
PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Track Global Assignments

December 2006

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About This PeopleBook Preface

PeopleSoft Enterprise PeopleBooks provide you with the information that you need to implement and use PeopleSoft Enterprise applications from Oracle.

This preface discusses:

- PeopleSoft Enterprise application prerequisites.
- Application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only elements, such as fields and check boxes, that require additional explanation. If an element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft Enterprise applications are defined in this preface.

PeopleSoft Enterprise Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft Enterprise applications.

You might also want to complete at least one introductory training course, if applicable.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft Enterprise menus, pages, or windows. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft Enterprise applications most effectively.

Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft Enterprise applications.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft Enterprise applications. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Download and order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on Oracle's PeopleSoft Customer Connection website. Through the Documentation section of Oracle's PeopleSoft Customer Connection, you can download files to add to your PeopleBooks Library. You'll find a variety of useful and timely materials, including updates to the full line of PeopleSoft Enterprise documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check Oracle's PeopleSoft Customer Connection for updates to the upgrade instructions. Oracle continually posts updates as the upgrade process is refined.

See Also

Oracle's PeopleSoft Customer Connection, http://www.oracle.com/support/support_peoplesoft.html

Downloading and Ordering Printed Documentation

In addition to the complete line of documentation that is delivered on your PeopleBook CD-ROM, Oracle makes PeopleSoft Enterprise documentation available to you via Oracle's website. You can:

- Download PDF files.
- Order printed, bound volumes.

Downloading PDF Files

You can download PDF versions of PeopleSoft Enterprise documentation online via the Oracle Technology Network. Oracle makes these PDF files available online for each major release shortly after the software is shipped.

See Oracle Technology Network, <http://www.oracle.com/technology/documentation/psftent.html>.

Ordering Printed, Bound Volumes

You can order printed, bound volumes of selected documentation via the Oracle Store.

See Oracle Store, http://oraclestore.oracle.com/OA_HTML/ibeCCtpSctDspRte.jsp?section=14021

Additional Resources

The following resources are located on Oracle's PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Support, Documentation, Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Pre-Built Integrations for PeopleSoft Enterprise and JD Edwards EnterpriseOne Applications
Minimum technical requirements (MTRs)	Implement, Optimize + Upgrade; Implementation Guide; Supported Platforms
Documentation updates	Support, Documentation, Documentation Updates
PeopleBooks support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Release Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft Enterprise or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
Monospace font	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().

Typographical Convention or Visual Cue	Description
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft Enterprise system.

Note. Example of a note.

If the note is preceded by *Important!*, the note is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Cross-References

PeopleBooks provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See*. Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: “(FRA) Hiring an Employee”

Example of a region-specific heading: “(Latin America) Setting Up Depreciation”

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other Oracle reference and training materials. Please send your suggestions to your product line documentation manager at Oracle Corporation, 500 Oracle Parkway, Redwood Shores, CA 94065, U.S.A. Or email us at appsdoc@us.oracle.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements Used in PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.

Once, Always, and Don't Run	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Request ID	An ID that represents a set of selection criteria for a report or process.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.
User ID	An ID that represents the person who generates a transaction.

PeopleSoft Enterprise Human Resources Track Global Assignments Preface

This preface discusses:

- PeopleSoft products.
- PeopleSoft Enterprise HRMS Application Fundamentals.
- PeopleBook structure.

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Enterprise Human Resources Track Global Assignments.

PeopleSoft Enterprise HRMS Application Fundamentals

Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “PeopleSoft Enterprise HRMS Application Fundamentals Preface”

PeopleBook Structure

PeopleSoft PeopleBooks follow a common structure. By understanding this structure, you can use this PeopleBook more efficiently.

The PeopleBooks structure conveys a task-based hierarchy of information. Each chapter describes a process that is required to set up or use the application. Chapter sections describe each task in the process. Subsections within a section describe a single step in the process task.

Some PeopleBooks may also be divided into parts. PeopleBook parts can group together similar implementation or business process chapters within an application or group together two or more applications that integrate into one overall business solution. When a book is divided into parts, each part is divided into chapters.

The following table provides the order and descriptions of chapters in a PeopleBook

Chapters	Description
Preface	This is the chapter you're reading now. It explains: • How to use the Application Fundamentals book. • How PeopleBooks are structured. • Common elements used in the PeopleBook, if necessary.
Getting Started With...	This chapter discusses product implementation guidelines. It explains: • The business processes documented within the book. • Integrations between the product and other products. • A high-level documentation to how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.
Navigation	(Optional) Some PeopleSoft applications provide custom navigation pages that contain groupings of folders that support a specific business process, task, or user role. When an application contains custom navigation pages, this chapter provides basic navigation information for these pages. Note. Not all applications have delivered custom navigation pages.
Understanding...	(Optional) This is an introductory chapter that broadly explains the product and the functionality within the product.
Setup and Implementation	This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the product. For example, if functionality X is part of a product, this chapter would be devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You would look to the corresponding business process chapter to learn how to use the functionality. Note. There may be times when a small amount of business process information is included in a setup chapter if the amount of business process documentation was insufficient to create a separate section in the book.

Chapters	Description
Business Process	This can be one or more chapters. These chapters contain documentation that addresses specific business processes with each chapter generally devoted to a specific functional area. For example, if functionality X is part of a product, this chapter would be devoted to explain how the functionality works, not necessarily how to set up functionality X. You would look to the corresponding setup and implementation chapter to learn how to set up the functionality. Note. There may be times when a small amount of setup and implementation information is included in a business process chapter if the amount of setup and implementation documentation was insufficient to create a separate chapter in the book.
Appendixes	(Optional) If the book requires it, one or more appendixes might be included in the book. Appendixes contain information considered supplemental to the primary documentation.
Delivered Workflow Appendix	(Optional) The delivered workflow appendix describes all of the workflows that are delivered for the application. Note. Not all applications have delivered workflows.
Reports Appendix	(Optional) This appendix contains an abbreviated list of all of the product's reports. The detailed documentation on the use of these reports is usually included in the related business process chapter.

CHAPTER 1

Getting Started with Track Global Assignments

This chapter provides an overview of the Track Global Assignments business process in and discusses:

- Track Global Assignments business processes.
- Track Global Assignments business process integrations.
- Track Global Assignments business process implementation.

Track Global Assignments Business Process Overview

Track Global Assignments business process in PeopleSoft Enterprise Human Resources enables you to assign employees to a global assignment and to monitor, compensate, and track education and qualification for the employees and their dependents as they move from project to project in your organization's operations in multiple countries.

This section provides an overview of global assignment tracking and discusses:

- Temporary versus permanent assignments.
- Managing employees on global assignment.

Understanding Global Assignment Types

If your organization has operations in more than one country, you process large amounts of information about employees as they move from project to project. PeopleSoft Enterprise Human Resources enables you to ensure smooth transitions for employees on global assignments.

You can manage temporary assignments for:

- Expatriate employees.

Home base employees who work in other countries or locations.

- Inpatriate employees.

Employees from other countries who work in your organization's home country.

- Third country nationals.

Employees who are citizens of one country and have a home base in a second country but go on assignment to a third country. For example, a Canadian citizen with a home base in the United States may go on assignment to Saudi Arabia.

Temporary Versus Permanent Assignments

Before you begin to administer a new assignment, determine whether the assignment is temporary or permanent.

- Temporary Assignments

In a temporary assignment, you expect the employee to return to a home base when the assignment ends. An assignment is considered temporary even if it lasts up to several years.

Before the employee leaves for a temporary global assignment, you establish a home base (where the employee is permanently based) for the employee where you keep central employee, benefit, and payroll data for that employee. Create new records to track employee data for the new location. The new location is referred to as the host location.

You maintain two sets of employee data: one set is home data and the other is host data for the new assignment abroad. To keep two sets of current data for an employee, you create new employment record numbers, which precludes you from overwriting existing home information.

- Permanent Assignments

A permanent assignment is one where the host location becomes the employee's new home base. You do not expect the employee to return to his or her previous home base. For permanent assignments, all employee, benefit, and payroll data tracking should occur at the new location. You no longer need to keep employee data at the previous home base. When employees change to permanent assignments elsewhere, you transfer employee data using the Job Data pages in the Workforce Administration menu.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce*, "Increasing the Workforce".

Managing Employees on Global Assignment

To manage employees on global assignment:

1. Ensure that employees have home data—standard, permanent personnel administration data in Human Resources, including employee IDs.
2. Establish host data for each assignment, such as location, job code, and department.
3. Enter assignment details, including the start and end date of the assignment, the disposition of the employee residence, vehicle information, and furniture arrangements.
4. Set up data for dependents who are accompanying the employee on the assignment, including non-family members such as nannies.
5. Enter payment instructions for supplemental earnings or deductions, such as cost-of-living adjustments, school tuition reimbursements, hypothetical tax deductions, and housing allowances.
6. When the assignment is completed, enter the end date.

Human Resources also contains several supplemental pages to help you process assignments. You can:

- Track visas and permits required for employees and their dependents.
- Track company-paid travel.
- Provide information on international schools and programs.
- Review educational qualifications, competencies, accomplishments, and languages of employees.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, "Increasing the Workforce," Adding Organizational Instances for Employees, Contingent Workers, and POIs

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, "Updating Person and Job Information"

Track Global Assignments Business Processes

Track Global Assignment provides the following business processes:

- Track assignees qualifications.

Track assignees qualifications for assignments, such as education, languages, and competencies.

- Track assignments.

- Manage assignments.

Manage assignees assignment details, such as their home base job information and their job information (host) while on assignment, in addition to assignment beginning and end dates, travel details, residence details, and vehicle assignments.

- Track dependent information.

Track information about assignee's dependents.

- Track company paid travel.

Track company paid travel for assignees and their dependents.

- Track assignment compensation.

Track employee compensation that results from an assignment.

- Track educational allowances.

Track educational allowances for assignees and their dependents.

We discuss these business processes in the business process chapters in this PeopleBook.

See Also

[Chapter 3, "Tracking Assignments," page 17](#)

[Chapter 4, "Managing Educational Allowances," page 43](#)

Track Global Assignments Business Process Integrations

Human Resources integrates with all PeopleSoft HRMS applications, other PeopleSoft applications, and third-party applications.

Human Resources shared tables are available to many PeopleSoft HRMS applications. In addition, data in many Human Resources tables is available to PeopleSoft applications set up to subscribe to the published messages.

Track Global Assignments Business Process Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “PeopleSoft Enterprise HRMS Application Fundamentals Preface”

Enterprise PeopleTools PeopleBook: PeopleSoft Setup Manager

CHAPTER 2

Setting Up Global Assignments

This chapter discusses how to:

- Implement employee data security for global assignments.
- Define global assignment types.
- Classify types of company-paid travel.
- Define deductions and earnings for assignment compensation.
- Set up education data for assignments.

Understanding Special Security Options for Global Assignments

Employees on global assignment have two Job Data records: a Home assignment and Host assignment. Because of the challenges of managing someone with two job data records that are separate, yet connected, PeopleSoft HCM security provides you with Home/Host security options that apply to the data permission security that you have already set up for your users.

Using Home/Host security options you can:

- Limit a user's access to the Job Data records to which their standard data permission grants them access.

Note. This is the default option in effect when you choose not to enable any Home/Host security options.

- Enable a user who has access to an employee's Home data to also be able view the Host data.
- Enable a user who has access to an employee's Host data to also be able to view the Home data.
- Enable users with Home data to be able to view Host data and users with access to Host data to be able to view Home data.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up and Administering HRMS Security".

Example: Using Home/Host Security Options

Jan Smit is ordinarily based in New York but has been sent on assignment to Sydney, Australia. Jan's organization uses the Business Unit field to secure person data. Her Home Job Data record is in the Eastern US business unit and her Host Job Data record is in the Australia Business Unit.

The following table illustrates who can access Jan's data, depending on how Home/Host access has been set up:

Note. The system uses a number of fields from the Job Data pages to secure the data of people with jobs, but their data is secured using this data on a variety of pages throughout the system, not just the job pages.

Home/Host Access Type	Data Tied to Home Job Data	Data Tied to Host Job Data
No Home/Host Security Option	Eastern BU users*	Australia BU users**
Home can see Host	Eastern BU users	• Australia BU users • Eastern BU users
Host can see Home	• Eastern BU users • Australia BU users	Australia BU users
Both (Home can see Host and Host can see Home)	• Eastern BU users • Australia BU users	• Australia BU users • Eastern BU users

Note. Eastern BU users: People with access to the Eastern US business unit, such as Jan's Home manager or the Eastern US HR Administrator.

Australia BU users: People with access to Australia business unit, such as Jan's Host manager or the Australian HR Administrator.

Setting Up Home/Host Security Options

To enable home host security:

1. Select the Include Home/Host Access? check box on the Security Install Settings page (SCRTY_INSTALL) and indicate which version of Home/Host security you want to use.
2. On the Security Access Type page (SCRTY_TYPE2_TBL), select which version of Home/Host security to use.

By enabling Home/Host security at the security access type level, you can use it with one security type but not another.

For example, managers may have data permission using the Job Department Tree security access type and HR administrators have access using the Job Location access type. You could enable Home/Host Security for the Job Location access type to allow HR administrators to continue to administer employees on assignment, while not enabling it for managers so that they can continue to only see their current direct reports.

Note. The options available depend on which option you selected on the Security Install Settings page.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up and Administering HRMS Security," Implementing Data Permission Security.

Defining Global Assignment Types

To set up global assignment types, use the Assignment Type Table (ASSGN_TYPE_TABLE) component.

This section discusses how to create new types of employee assignments.

Page Used to Define Global Assignment Types

Page Name	Object Name	Navigation	Usage
Assignment Type Table	ASSGN_TYPE_TABLE	Set Up HRMS, Product Related, Workforce Administration, Global Assignments, Assignment Type Table	Create new types of employee assignments.

Creating New Types of Employee Assignments

Access the Assignment Type Table page.

Assignment Type Table

Assignment Type: D02

Assignment Type

Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900 31

*Status: Active

*Description: Business Trip Out-of-Country

Short Description: Bus Out-Cn

Assignment Type Table page

(GER) Defining German Assignment Types

When entering assignment types for Germany, select from these options:

Type	Description
A01	Assignment In-Country
A02	Assignment Expat DBA taxfree
A03	Assignment Expat DBA taxable
A04	Assignment Expat ATE taxfree
A05	Assignment Expat ATE taxable
D01	Business Trip In-Country
D02	Business Trip Out-of-Country
D03	Assembly Assignment DBA taxable

Classifying Types of Company-Paid Travel

To set up types of company-paid travel, use the Travel Type Table (TRAVEL_TYPE_TABLE) component.

This section discusses how to classify types of company-paid travel.

Pages Used to Classify Types of Company-Paid Travel

Page Name	Object Name	Navigation	Usage
Travel Type Table	TRAVEL_TYPE_TABLE	Set Up HRMS, Product Related, Workforce Administration, Global Assignments, Travel Type Table	Classify types of company-paid travel. Use the codes that you set up here to make travel arrangements for employees and their dependents in the Company Paid Travel page.

Classifying Types of Company-Paid Travel

Access the Travel Type Table page.

Travel Type Table page

Effective Date

Enter the date the travel type becomes effective.

Status

Select a status for the travel type. Available options: *Active* or *Inactive*

Description

Enter a descriptive label for the travel type you are defining.

Home Leave

Select to indicate that a worker is going on leave to his or her home (permanent) location.

If you select *Home Leave*, the system automatically disables the fields in the To section on the Company Paid Travel page when this travel type is used.

Defining Deductions and Earnings for Assignment Compensation

To set up deductions and earning for assignment compensation, use the Earnings (EARNINGS_TABLE1), and Deductions (DEDUCTION_TABLE1) components.

This section provides an overview of assignment deductions and earnings and discusses how to:

- Add deduction codes and classification information.
- Define tax treatments.
- Add earnings codes.

Understanding Assignment Deductions and Earnings

Employees on global assignments often are entitled to supplemental earnings, such as cost-of-living adjustments and hardship premiums. You might also take additional deductions from the employee's paycheck because of estimated taxes.

Enter earnings and deductions as they relate to home and host assignment data. For example, an employee might receive a cost-of-living adjustment that is paid for by the host location and a hardship premium that the home location absorbs. Enter these components in multiple currencies; the system automatically calculates the equivalent amounts in the home currency.

To identify recurring payments or isolated incidents of supplemental earnings or deductions, track compensation data by employee and payment instruction type. PeopleSoft includes two types of payment instructions: global compensation and one-time payments. These are sufficient for most compensation that relates to global assignments.

If the organization is not using PeopleSoft Enterprise Payroll for North America and you want to track assignment compensation, set up deduction, tax, and earnings information on the Earnings and Deductions components.

You can track assignment compensation on the Assignment Compensation component.

See [Chapter 2, “Setting Up Global Assignments,” Adding Deduction Codes and Classification Information, page 10](#).

Note. Use the Payroll for North America Earnings and Deductions tables (Set Up HRMS, Product Related, Payroll for North America) to set up earnings and deductions if you use Payroll for North America. The global assignments tables do not contain enough information to substitute for the payroll tables.

Make the tables in the Global Assignments menu display-only to ensure that all updates take place by using the pages in North American Payroll.

See Also

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, “Defining Earnings Codes and Earnings Programs”

[Chapter 2, “Setting Up Global Assignments,” Adding Deduction Codes and Classification Information, page 10](#)

[Chapter 3, “Tracking Assignments,” Tracking Assignment Compensation and Currency Fluctuation, page 40](#)

Pages Used to Define Deductions and Earnings for Assignment Compensation

Page Name	Object Name	Navigation	Usage
Deduction Table	DEDUCTION_TABLE1	Set Up HRMS, Product Related, Workforce Administration, Global Assignments, Deductions	Add deduction codes and classification information.
Deduction Table2	DEDUCTION_TABLE2	Set Up HRMS, Product Related, Workforce Administration, Global Assignments, Deduction Table2	Define tax treatments for assignment deductions.
Earnings Table	EARNINGS_TABLE1	Set Up HRMS, Product Related, Workforce Administration, Global Assignments, Earnings	Add earnings codes for global assignments.

Adding Deduction Codes and Classification Information

Access the Deduction Table page.

Deduction Table | Deduction Table2

Plan Type: 00 General Deduction **Deduction Code:** B00-03

Deduction Information Find First 1 of 1 Last

*Effective Date: 01/01/1980

*Description: Travel Advance

Short Description: Travel Adv

Deduction Priority: 125

Special Processing: [Dropdown]

Maximum Arrears Payback

☒ No Maximum

☐ Flat Maximum for Payback [Text Box]

☐ Factor x Regular Deduction [Text Box]

Deduction Subset Find View All First 1 of 1 Last

*Subset ID	Description
[Text Box]	[Text Box]

Deduction Table page

For deduction codes for global assignments, enter a Plan Type of 00.

Warning! Enter information in these fields only: Effective Date, Description, and Short Description. Otherwise, the system assumes that the code that you define here is for payroll purposes when you enter the code on other assignment pages. You could also receive an error message if you don't fill in all of the required fields that are on the other pages for the table that is in the Payroll for North America or Payroll Interface menus, depending on the payroll system that you use.

Defining Tax Treatments

Access the Deduction Table2 page.

Deduction Table **Deduction Table2**

Plan Type: 00 General Deduction

Deduction Code: B00-03 Travel Advance

Deduction Information Find First 1 of 1 Last

Effective Date: 01/01/1980

Tax Classifications Find | View All First 1 of 1 Last

Deduction Classification

- ☒ After-Tax
- ☐ Before-Tax
- ☐ Nontaxable Benefit
- ☐ Nontaxable Btax Benefit
- ☐ Taxable Benefit
- ☐ QC Taxable Benefit

Canadian Sales Tax

- ☒ None
- ☐ Goods and Services Tax
- ☐ Harmonized Sales Tax
- ☐ Provincial Sales Tax
- ☐ Provincial Sales Tax Insurance
- ☐ Provincial Premium Tax

Special Accumulator(s) Find | View All First 1 of 1 Last

*Accum Code:

*Effect on Special Balance: Adds to

Deduction Table2 page

Deduction Classification Select a deduction type.

Canadian Sales Tax Select the type that is required in Canada.

Adding Earnings Codes

Access the Earnings Table page.

Earnings Table	
Earnings Code: AUT	
Earnings Information Find First 1 of 1 Last	
*Effective Date:	01/01/1980
*Status:	Active
*Description:	Automobile Allowance
Short Description:	Auto Allow
*Allowable Employee Types:	All
Payment Type ☐ Either Hours or Amount OK ☐ Both Hours and Amount OK ☐ Hours Only ☒ Amounts Only ☐ Unit/Override Rate ☐ Flat Amount	Effect on FLSA ☒ None ☐ Both Hours and Amount ☐ Hours Only ☐ Amounts Only
Eligible for Retro Pay ☐ Eligible for Retro Pay ☐ Used to Pay Retro	
☐ Hours Distribution	

Earnings Table page

Warning! Enter information in these fields only: Effective Date, Description, and Short Description. Otherwise, the system assumes that the code that you define here is for payroll purposes when you enter the code on other assignment pages. You could also get an error message because you don't fill in all of the required fields that are on the other pages for the table that is in the Payroll for North America or Payroll Interface menus, depending on the payroll system that you use.

Setting Up Education Data for Assignment

To set up additional education data, use the Majors (MAJOR_TABLE), School/Program Table (INTL_SCHPGM_TABLE), and School/Program Contact Table (INTL_CONTACT_TABLE) components.

This section provides an overview of assignment education data and discusses how to:

- Enter school and orientation program information.
- Track contacts for schools and programs.

Understanding Assignment Education Data

The organization may provide financial assistance to employees who are on global assignments, such as school tuition for children and language and orientation classes for adults. PeopleSoft Enterprise Human Resources helps determine any educational assistance to which employees are entitled and tracks multiple institutions.

If the organization offers education allowances for employees or dependents, set up information about the schools and programs that are available to the employees and their dependents.

Setting Up Majors

Use the Major Table page if you need to set up a new major for global assignments.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles*, “Managing Profiles”.

Pages Used to Set Up Assignment Educational Data

Page Name	Object Name	Navigation	Usage
School/Program Table	INTL_SCHPGM_TABLE	Set Up HRMS, Product Related, Workforce Administration, Global Assignments, Define Education Related Info, School/Program Table	Enter school and program information.
School/Program Contact Table	INTL_CONTACT_TABLE	Set Up HRMS, Product Related, Workforce Administration, Global Assignments, Define Education Related Info, School/Program Contact Table	Track contacts for schools and programs. Note. You must already have set up information for international schools and programs in the School/Program table.
Major Table	MAJOR_TABLE	Set Up HRMS, Product Related, Workforce Administration, Global Assignments, Define Education Related Info, Majors	Include areas of study most commonly associated with school degrees or certificates.

Entering School and Orientation Program Information

Access the School/Program Table page.

School/Program Table	
School/Program Code: K00003	
Program Table Details Find View All First 1 of 1 Last	
*Effective Date:	01/01/1980
*Status:	Active
*Description:	The British Council Schl Spain
Short Description:	BC Madrid
*Sch/Pgm Typ:	Private School
*Int/Ext:	External
Address Country: ESP Spain Address: Promenade del General Martinez Campos, 31. 28010- Madrid, Madrid Edit Address	

School/Program Table page

Sch/Pgm Typ (school or program type) Select a school or program type. Options are: *Language School*, *Private School*, *Public School*, *Other*, and *Local Customs*.

Int/Ext (internal or external) Select *Internal* to the organization or *External*.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “Setting Up Local Country Functionality”

Tracking Contacts for Schools and Programs

Access the School/Program Contact Table page.

School/Program Contact Table	
School/Program Code: K00003 The British Council Schl Spain	
Program Contact Table Details Find View All First 1 of 1 Last	
*Contact #:	1
*Name:	Labrtino,Christophe
Title:	Dean
Contact Type:	Primary
Contact Phone Numbers Find View All First 1 of 1 Last	
*Phone Type Main	Phone 331-235843

School/Program Contact Table page

- Contact # (contact number)** Enter the contact number of the school or program. For example, enter the headmistress of a school as the first contact, and the assistant headmistress as the second contact.
- Contact Phone Numbers** Select the phone type and enter the phone number for the contact. Add new data rows to list more than one contact phone number for each contact.

CHAPTER 3

Tracking Assignments

This chapter provides an overview of global assignment tracking and discusses how to:

- Create checklists.
- Manage employee home and host data.
- Manage assignments with multiple home or host data records.
- Manage employee assignment data.
- Manage company-paid travel for employees on assignment.
- Manage dependent information for employees on assignment.
- Track assignment compensation and currency fluctuation.

Understanding Global Assignment Tracking

When you send an employee on a global assignment, you track new assignment details, additional employee earnings and deductions, and different benefits packages. You might also administer an employee's personal affairs, such as housing, vehicles, and furniture. With PeopleSoft Enterprise Human Resources, you can settle employees and their dependents in new locations.

Note. Before you process a global assignment, a human resources record and emplID must already exist in the PeopleSoft Enterprise Human Resources system for the employee.

Creating Checklists

To set up checklists, use the Checklist Items (CHKLST_ITEM_TBL) and Checklist (CHECKLIST_TABLE) components.

This section provides an overview of creating checklists and lists the pages used to create checklists.

Understanding Creating Checklists

Much of the information that you process for different assignment types and countries remains constant. To save yourself work (and prevent data entry errors or omissions), create standard checklists to streamline global assignment processing. For special situations, use standard checklists as the basis for creating modified checklists.

Set up checklists by using the Checklist Item Table and Checklist Table pages. To tailor a checklist for an employee, use the Person Checklist page.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, “Setting Up the Administer Workforce Business Process,” Creating Checklists

Pages Used to Create Checklists

Page Name	Object Name	Navigation	Usage
Chklst Item Table (checklist item table)	CHKLST_ITEM_TABLE	Set Up HRMS, Common Definitions, Checklists, Checklist Items	Define items that could appear on a checklist.
Checklist Table	CHECKLIST_TABLE	Set Up HRMS, Common Definitions, Checklists, Checklist	Define employee checklists.
Employee Checklist	EMPLOYEE_CHECKLIST	Workforce Administration, Personal Information, Organizational Relationships, Person Assignment Checklist	Identify checklist items to use as a guide to process employees.
Person Checklist	PERSON_CHECKLIST	Workforce Administration, Personal Information, Organizational Relationships, Person Checklist	Identify checklist items to use as a guide to process people.

Managing Employee Home and Host Data

This section discusses how to:

- Define and maintain home location information.
- Define and maintain host location information.
- Define assignee qualifications.
- Begin assignments.
- End assignments.
- Transfer an employee permanently.
- Add a host assignment.
- View and update home and host information.
- Add or view home and host payroll data.
- Add or view home and host assignment data.
- Add or view home and host benefits data.

Pages Used to Manage Employee Home and Host Data

Page Name	Object Name	Navigation	Usage
Add Host Assignment	PER_ORG_INST_ASGN	Workforce Administration, Global Assignments, Track Assignment, Add a Host Assignment	Add a host assignment and review a summary of an employee's home and host assignments.
Home/Host Data	HOME_HOST_DATA	- Workforce Administration, Global Assignments, Track Assignment, Add a Host Assignment Click the Add Assignment button to access the Home and Host Data component and select the Home/Host Data page. - Workforce Administration, Global Assignments, Track Assignment, Home and Host Data, Home/Host Data	View home information, and view and update host information. Note. Home data comes from the job data pages. You must have created an employment instance for the employee. Note. You must establish a host employment record to manage assignments from the Assignment Data component.
Payroll Data	JOB_DATA_2	- Workforce Administration, Global Assignments, Track Assignment, Add a Host Assignment Click the Add Assignment button to access the Home and Host Data component and select the Payroll Data page. - Workforce Administration, Global Assignments, Track Assignment, Home and Host Data, Payroll Data	Add or view home and host payroll data. Home data comes from the job data pages. You must have already created an employment instance for this employee.

Page Name	Object Name	Navigation	Usage
Assignment	HOME_HOST_ASGN	- Workforce Administration, Global Assignments, Track Assignment, Add a Host Assignment Click the Add Assignment button to access the Home and Host Data component and select the Assignment page. - Workforce Administration, Global Assignments, Track Assignment, Home and Host Data, Assignment	Add or view host assignment data. You must have already created an employment instance for this employee. Note. The system displays this page on the Home and Host Data component only when the employee has a current assignment and you have used a Host employee record number to access it.
Global Assignment Detail	ASGN_VLD_VW	Workforce Administration, Global Assignments, Track Assignment, Add a Host Assignment, Assignment Click the Choose an Existing Assignment link on the Assignment page.	Associate the current host with the selected assignment.
Benefits	JOB_DATA_BENPRG	- Workforce Administration, Global Assignments, Track Assignment, Add a Host Assignment Click the Add Assignment button to access the Home and Host Data component, and select the Benefits page. - Workforce Administration, Global Assignments, Track Assignment, Home and Host Data, Benefits	Add or view home and host benefits data. Home data comes from the job data pages. You must have already created an employment instance for this employee.
Work Location	JOB_DATA1	Workforce Administration, Job Information, Job Data, Work Location	Update position and location information for a person's job.

Defining and Maintaining Home Location Information

To manage employee global assignments, first establish an employee's permanent, or home, location and data on the Job Data component (JOB_DATA). The home location is the place to which the employee returns when a temporary assignment ends, and the home data is the employee's job data when the employee is not on assignment.

If you added an employment instance for a person into the PeopleSoft Enterprise Human Resources system, the employee has a job data record that serves as the home information. If the employee is a new employee, create an employment instance before processing the assignment.

Note. An employee may have more than one job at home, and so may have more than one home human resources record.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, “Increasing the Workforce,” Adding Organizational Instances for Employees, Contingent Workers, and POIs

Defining and Maintaining Host Location Information

Each time that you send an employee on a temporary assignment, you need to create a separate set of host and benefits data for that assignment. Host data includes information such as job, department, and location. Host benefits data consists of the employee’s benefits program participation. By creating a separate set of data for the assignment, you retain permanent home and benefits data for the employee and track data for the current assignment.

The first time that you add host data for a new assignment, create a new job record on the Add a Host Assignment component (ADD_HOST_ASSIGN).

When you create a host job record, the job information fields are available for entry on the Home/Host Data page. Use the Home and Host Data component (HOME_HOST_DATA) to manage and review employees’ host location information and to assign job records to assignments. When you save the new host information, the system stores the data in the employee’s employment, job, and benefit program participation tables. These are the same tables in which all standard job data is stored.

When one global assignment ends, reuse the same job record and enter a new data row for the new assignment.

Note. You generally use one host employment record to track all global assignments for an employee, except in special circumstances, such as concurrent host assignments or different sets of benefits for a particular assignment. For these cases, add another employment record number to track the data separately.

Defining Assignee Qualifications

To identify the best-qualified employees to send on assignments, review employees’ person profiles. You can use person profiles to record employees’ educational qualifications and skills, and track additional education and skills acquired while on assignments.

You can access the Person Profiles component (JPM_PERSON_PROFILE) from Workforce Administration, Global Assignments, Assignee Qualifications.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles, “Managing Profiles”

Beginning Assignments

To begin an employee’s assignment:

- Create a host job record if one does not already exist.

Note. Use the same job record for all assignments, entering a new data row for each assignment.

See [Chapter 3, “Tracking Assignments,” Defining and Maintaining Host Location Information, page 21.](#)

- The Action code *Assignment* (ASG) is selected automatically. Select any appropriate Reason code.
- Enter the host information for this assignment.

Ending Assignments

To end an assignment, insert a data row on the Home/Host Data page and select *Assignment Completion* (ASC) in the Action field.

End an assignment only if the employee is not immediately sent on a new assignment.

If the employee is going on a new assignment immediately, enter a new row for the new assignment.

Transferring an Employee Permanently

Sometimes an employee on temporary assignment stays at a location permanently. As a permanent employee, he or she shares the same status as a local employee and should no longer be managed as an employee on temporary assignment. All employee, benefit, and payroll data tracking for the employee takes place at the new location because it is the employee's new home base.

To transfer an employee permanently:

1. End all open temporary global assignments.
2. Access the Work Location page, insert a row, and enter the department, location, and job code for the permanent host assignment.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, "Updating Person and Job Information," Updating Job Data

Adding a Host Assignment

Access the Add Host Assignment page.

Add Host Assignment

Patrick Seto

Person ID:
KU0011

Organizational Instance

Find | View All First 1 of 1 Last

Org Relation: Employee

Organizational Instance: 0

HR Status: Active

Pay Status: Active

Effective Date: 01/02/1980

Business Unit: US001 GBI BU for US001

Department: 13000 Finance

Company: GBI Global Business Institute 9999

Last Start: 01/02/1980

Create Host Assignment

Next Empl_Rcd 2

Assignments

Customize | Find 1-2 of 2 Last

Empl Rcd Nbr	HR Status	Effective Date	Business Unit	Department	Home/Host
0	Active	01/02/1980	US001	13000	Home
1	Active	01/06/2006	GBIBU	10500	Host

Add Host Assignment page

Create Host Assignment

Click to access the Home/Host Data page, on which you create a host assignment. For employees with more than one organizational instance, click the Create Host Assignment button that corresponds to the organizational instance for which you want to create a host assignment.

Note. You normally use the same job data record for all of an employee's host assignments. Do not create a new assignment record unless you have a compelling reason to do so. Instead, insert a new row into the employee's existing host record.

Next Empl_Rcd (next employee record)

When you create a new host record, the system identifies it using this employee record number.

Refresh

Click to refresh the Assignments table and view a new assignment. The Refresh button appears when a new assignment is created.

Assignments

Displays all current assignments.

Emp Rcd Nbr (employee record number)

For employees with multiple assignments, the system generates employment record numbers to track data for each concurrent job. A new hire's employee record number for his or her initial job is set to 0. For each subsequent job that the employee receives, an additional, sequential employee record number is assigned.

Home/Host

For employees with multiple assignments, the system populates this field with:

- *Home* if an assignment is based at the employee's home location.
- *Host* if an assignment is based at a location other than the employee's home location.

Viewing and Updating Home and Host Information

Access the Home/Host Data page.

Home/Host Data		Payroll Data	Assignment	Benefits
Patrick Seto		EMP		ID: KU0011 Empl Rcd #: 1
Home Organizational Instance				
Organizational Instance:	0	Last Start Date:	01/02/1980	Termination Date:
Home/Host Data Find View All First 1 of 1 Last				
*Effective Date:	01/06/2006	HR Status:	Active	Pay Status: Active Action Date: 04/21/2006
*Action:	Assignment	Reason:		*Job Indicator: Secondary
Position Number:		Override Position Data ☐ Position Management Record		
*Reg Region:	USA			
*Business Unit:	GBIBU	Global Business Institute BU		
Company:	GBI	Global Business Institute 9999		
*Department:	10500	Benefits		
Location:	KUNY00	Corporation Headquarters	United States	
*Job Code:	120000	Administrator	*Full/Part Time: Full-Time	
Supervisor:	KUZ009	Eduardo Campos		
Reports To:				
Standard Hours				
Standard Hours:	40.00	Combined Std Hours / FTE:	80.00	/ 2.000000
Work Period:	W	Weekly	As of Date:	01/06/2006
FTE:	1.000000			

Home/Host Data page

To create a host assignment and enter the employee's job information for the assignment, you access this page using the Add a Host Assignment component. To add or change assignment data for an existing host, access this page using the Home and Host Data component by selecting the employee's host employment record number.

If you access the component by using an employee's home employment record number, the elements on this page are display-only, showing data from the employee's job record. The Assignment tab is not available if you access the component by using an employee's home employment record number.

The elements that are on this page are the same as those that appear on the Job Data component.

Action Date

Displays the date on which you enter this row.

Action

Select an action to distinguish global assignments from other administrative actions. For new assignments, the action *Assignment* is automatically selected. When an assignment is completed and you add a new row, *Assignment Completion* is automatically selected.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce*, “Setting Up the Administer Workforce Business Process”.

Reason

You can identify specific reasons for sending employees on assignments. For example, you might process some assignments that are due to a transfer of skills and others that are due to a shortage of local skilled personnel. To track assignment types more easily, specify reasons for them.

Use the Action Reason table to set up reasons that are specific to global assignments.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce*, “Setting Up the Administer Workforce Business Process”.

Adding or Viewing Home and Host Payroll Data

Access the Payroll Data page.

Payroll Data page

The elements that are on this page are the same as those that appear in the Job Data component.

Payroll System

Enter the payroll system used for the host. Doing so does not affect employee home data.

You can make changes on the Payroll Data page, or on the Payroll page in the Workforce Administration menu.

Tax Location Code

Select the tax location code for the assignment.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, “Increasing the Workforce,” Entering Payroll Processing Data

Adding or Viewing Home and Host Assignment Data

Access the Assignment page.

Home/Host Data		Payroll Data		Assignment		Benefits	
Patrick Seto		EMP		ID: KU0011		Empl Rcd #: 2	
Home Organizational Instance							
Organizational Instance:		0		Last Start Date:		01/02/1980	
				Termination Date:			
Host Data Find View All First 1 of 1 Last							
Effective Date:		01/06/2006		HR Status:		Active	
Last Asgn Start:				Action:		Assignment	
				Termination Date:			
Global Assignment Detail							
Enter New Assignment Begin DT:				01/07/2006			
*End Date:				01/06/2007			
*Assignment Type:				Foreign Loan Assignment			
Departure Date:							
*Country:				USA United States			
City:				Paia			
Contact ID:							
Comment:							
				Arrival Date:			
				State: Hawaii			

Assignment page

This page appears only when you are creating a new host assignment, or when an existing assignment exists and you use a host employee record number to access the Home and Host Data component.

The elements that are on this page are the same as those that appear in the Job Data component.

Enter New Assignment Begin DT (enter new assignment begin date)

Select the beginning date for the assignment. When you select the date, the following fields appear on the page.

Existing Assignment Begin Date

This field appears when you have an existing assignment. When you are in the correction mode, you can select a new date to change the assignment date, or change the assignment that is associated with the host.

Choose an Existing Assignment

This link appears when you are in the correction mode. Click this link to access the Global Assignment Detail page (ASGN_VLD_VW) and select an existing assignment. The current host will then be associated with the selected assignment. An assignment date can have up to two hosts associated with it.

End Date

Enter the ending date for the assignment.

Assignment Type

Select a value that is created in the Assignment Type table.

Departure Date and Arrival Date

Enter or change the employee's estimated date of departure from the home location and arrival at the new primary host.

Country

Select the assignment host country.

Adding or Viewing Home and Host Benefits Data

Access the Benefits page.

Home/Host Data		Payroll Data		Assignment		Benefits	
Patrick Seto		EMP		ID: KU0011		Empl Rcd #: 1	
Benefit Record Number: 0							
Benefit Status Find First 1 of 1 Last							
Effective Date: 01/06/2006		Effective Sequence: 0		Go To Row			
Action: Assignment		Reason:					
*Benefits System:		Benefits Administration		Benefits Employee Status:		Active	
Annual Benefits Base Rate:				USD			
Benefits Administration Eligibility							
BAS Group ID: B01		BAS Group					
Elig Fld 1:		Elig Fld 2:		Elig Fld 3:		Elig Fld 4:	
Elig Fld 5:		Elig Fld 6:		Elig Fld 7:		Elig Fld 8:	
Elig Fld 9:		Elig Fld 10:		Elig Fld 11:		Elig Fld 12:	
Benefit Program Participation Find View All First 1 of 1 Last							
*Effective Date		*Benefit Program		Currency Code			
01/02/1980		KU1 GBI Master US Benefit Program		USD			

Benefits page

The elements that are on this page are the same as those that appear in the Job Data component.

Benefits System

Enter a benefit program. Doing so does not affect other employee home data.

You can make changes on the Benefits page, or on the Benefit Program Participation page which you select from the Workforce Administration menu.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, “Increasing the Workforce,” Specifying Benefit Program Enrollment

Managing Assignments with Multiple Home or Host Data Records

This section discusses how to:

- Add assignments when an employee has multiple jobs at home.
- Add assignments when an employee has multiple host locations.
- Associate multiple home or host data with an assignment.

Adding Assignments When an Employee Has Multiple Jobs at Home

For most global assignments, the employee has one home job record and one host job record; however, you may encounter situations in which an employee has more than one job at home or more than one assignment.

Some employees have more than one employment record in the system before they go on a global assignment. For example, an American university professor going to teach at Oxford for a year might have two jobs in the U.S., one as a professor and another as a researcher. The employee already has two employment records in the system for the home jobs, so you need to create a third employment record for the host.

To track host data for an employee with multiple home records:

1. Create a new host employment record on the Add a Host Assignment component (ADD_HOST_ASSIGN).

On the Add Host Assignment page, click the Create a New Assignment button for the organizational instance for the home record for which you are creating the assignment.

The system adds another employment record so that you (and the system) can differentiate between the jobs.

2. Enter payroll information on the Payroll Data page.
3. Enter assignment dates on the Assignment page.

When you enter the assignment end date, the system checks whether other host records have effective dates that are equal to or before the end date that you enter.

4. Enter benefits data on the Benefits page.
5. Click OK to save entries.

Adding Assignments When an Employee Has Multiple Host Locations

Some employees split their time between two or more locations during an assignment. For example, a manager who was sent to Japan might also be assigned to work in Korea at the same time. Whether this is known before the assignment starts or arises during the assignment, the jobs are treated as different, concurrent host records in the system.

To track data for an employee with multiple host records:

1. Create a separate employment record for each host on the Add a Host Assignment component.

The system automatically assigns the next available employment record number, such as 2 or 3, for the host assignment.

2. Enter assignment dates and other details on the Home/Host Data, Assignment, Payroll Data, and Benefits pages.
3. Click OK to save entries.

Tying Multiple Home or Host Data to an Assignment

Assignments can be associated with only one Home record. If an employee has more than one home record (within an organizational instance), host records will be associated with the first home record.

If the employee has multiple, concurrent host records, associate all the host records with the assignment. Assignments are determined by the assignment begin date. The information that you enter on the Assignment and Assignment Data pages controls the earnings and deductions that track for home and host data on the Assignment Compensation page.

To associate a home and host record with an assignment:

1. Access the Add Host Assignment page.
2. On the Add Host Assignment page, click the Create New Assignment button for the home record for which you are creating the assignment.
3. Enter payroll information on the Payroll Data page.
4. Enter assignment dates on the Assignment page.
5. Enter benefits information on the Benefits page.
6. Click OK to save entries.

To associate multiple host records with an assignment:

1. Access the Assignment page using the employee record number for the host that you want to associate with an assignment.
2. Click the Correct History button.
3. Click the Choose an Existing Assignment link. The Global Assignment Detail page appears.
4. Select the check box for the assignment that you want to associate with the host.

If no entries automatically appear on the Additional Assignments page, then you selected an employment record number for a host record that's effective after the end date of the assignment. Either update the effective date of the host job information or change the end date of the assignment.

5. Save entries.

Managing Employee Assignment Data

This section discusses how to:

- Enter basic assignment data.
- View home and host information.
- Enter home residences and furniture information.
- Enter host residences and furniture information.
- Track home and host vehicle information.

Note. PeopleSoft Enterprise Human Resources also includes Administer Company Cars to track an organization's car-specific benefits.

Use the Assignment Data component (ASSIGNMENT_DATA) to manage employee assignment data.

Pages Used to Manage Employee Assignment Data

Page Name	Object Name	Navigation	Usage
Assignment Data	ASSIGNMENT_DATA	Workforce Administration, Global Assignments, Track Assignment, Assignment Data, Assignment Data	Enter and view information about assignment types.
Assignment Home/Host	ASSIGNMENT_HOMHST	Workforce Administration, Global Assignments, Track Assignment, Assignment Data, Assignment Home/Host	View home and host information.
Residence Home	RESIDENCE_HOME	Workforce Administration, Global Assignments, Track Assignment, Assignment Data, Residence Home	Enter information about home residences and furniture.
Residence Host	RESIDENCE_HOST	Workforce Administration, Global Assignments, Track Assignment, Assignment Data, Residence Host	Enter information about host residences and furniture.
Vehicle Data	VEHICLE_DATA	Workforce Administration, Global Assignments, Track Assignment, Assignment Data, Vehicle Data	Track the location and status of vehicles.
Person Org Summary (person organizational summary)	PERSON_SUMMARY	- Workforce Administration, Global Assignments, Track Assignment, Person Organizational Summary, Person Org Summary - Workforce Administration, Personal Information, Person Organizational Summary, Person Org Summary	Review a summary of a person's organizational relationships.
Assignment Summary	ASSGNMT_SUMMARY	Workforce Administration, Global Assignments, Track Assignment, Review Assignment Summary	Review a summary of an employee's assignment.
Employees on Assignment	RUNCTL_PER717	Workforce Administration, Global Assignments, Track Assignment, Employee on Assignment Report	Run the Employees on Assignment report (PER717), which lists the employees who are on assignment.

Entering Basic Assignment Data

Access the Assignment Data page.

Assignment Data	Assignment Home/Host	Residence Home	Residence Host	Vehicle Data
Yves Chabot		Person ID: KF0018		
Assignment Data Find View All First 1 of 1 Last				
*Begin Date: 11/01/1989		*End Date: 09/16/1993		
*Assignment Type: FLA		Foreign Loan Assignment		
Departure Date:		Arrival Date:		
Home Domicile				
*Country: FRA		France		
Department: 92		Hauts de Seine		
City: Levallois				
Host Contact Information		Comments		
Contact:				

Assignment Data page

Begin Date and End Date Change the begin and end dates for the assignment, if necessary.

Assignment Type Change the assignment value, if necessary.

Departure Date and Arrival Date Enter or change the employee's estimated date of departure from the home location and arrival at the new primary host.

Home Domicile

View information about the employee's home domicile.

The system uses the home domicile values from the employee personal data as default values. Use this information to process home leave travel on the Company Paid Travel page.

Host Contact Information

Enter a contact in the employee's host country who can be contacted by the home supervisor in case of emergency. The employee's name and work telephone number are provided.

Entering Home and Host Information

Access the Assignment Home/Host page.

Assignment Data		Assignment Home/Host		Residence Home		Residence Host		Vehicle Data	
Yves Chabot				Person ID:		KF0018			
Assignment Home/Host Find View All First 1 of 1 Last									
Assignment Type: Foreign		Begin Date: 11/01/1989		End Date: 09/16/1993					
Display Data as of									
☒ Assignment Begin Date ☐ Assignment End Date ☐ Current Date									
Home Instance									
Empl Rcd #:	0	HR Status:	Active	Last Start:	06/12/1983	End Date:			
Company:	KF1	Business I							
Business Unit:	FRA01	France Business Unit							
Department:	13000	Operations- Paris							
Job Code:	790000	Sales Manager							
Position Number:									
Location Code:	KFPA01	Paris	Country:	France	Currency:	FRF			
Supervisor Level:									
Host Data Find View All First 1 of 1 Last									
Empl Rcd #	1	HR Status:	Active	Last Start:	11/01/1989	End Date:			
Company:	KG1	BIUK							
Business Unit:	GBR02	Sales and Marketing - UK							
Department:	21300	Sales and Marketing - Scotland							
Job Code:	770045	Representative-Sales							
Position Number:									
Location Code:	KG02	Edinburgh - Scotland	Country:	United Kingdom	Currency:	GBP			
Supervisor Level:									

Assignment Home/Host page

Display Data as of

Select a date option to change the view of the home or host data. Values are:

- *Assignment Begin Date*
Select to view the home or host data as of the start date for the assignment.
- *Assignment End Date*
Select to view the home or host data as of the end date for the assignment.
- *Current Date*
Select to view the home or host data as of today's date.

The system populates the rest of the elements on the page with the data that is associated with them on the Home and Host Data component as of the date selected.

Home Instance and Host Data

The system displays the home and host location and job data according to the selected date.

Entering Home Residences and Furniture Information

Access the Residence Home page.

The screenshot shows the 'Residence Home' page. At the top, there are tabs for 'Assignment Data', 'Assignment Home/Host', 'Residence Home' (which is active), 'Residence Host', and 'Vehicle Data'. Below the tabs, the 'Residence Home' section has a header with 'Find | View All' and navigation buttons. The main form area includes fields for 'Begin Date' (11/01/1989), 'End Date' (09/16/1993), and 'Type' (Foreign). Below these is a 'Home Residence' section with 'Person ID' (KF0018), '*Residence Number' (1), and 'Description'. At the bottom is a 'Home Residence Detail' section with '*Effective Date' (11/06/1989), '*Status Before Assignment' (Rent), '*Status During Assignment' (N/A), '*Home Furniture' (N/A), and a checkbox for 'Property Management'. A 'Comment' field is also present.

Residence Home page

Residence Number

Displays the default value, *1*.

Leave the default value as is, unless you are using a different numbering sequence. Each time that you insert a new data row for another residence, the system assigns the next number in the sequence, such as 2 or 3.

Status Before Assignment and Status During Assignment

Select the status of the employee's residence before and during the assignment.

Home Furniture

Select the disposition of the employee's home furniture that is associated with the residence.

Property Management

Select if the company is using a property management company to assist in administering residence details.

Entering Host Residences and Furniture Information

Access the Residence Host page.

Assignment Data Assignment Home/Host Residence Home **Residence Host** Vehicle Data

Yves Chabot Person ID: KF0018

Residence Host Find | View All First 1 of 1 Last

Begin Date: 11/01/1989 End Date: 09/16/1993 Type: Foreign

Host Residence Find | View All First 1 of 1 Last

*Residence Number:	1	+ -
Description:	Edit Host Address	

Host Residence Detail Find | View All First 1 of 1 Last

*Effective Date:	11/11/1989	+ -
*Host Residence Status:	Cmpy Ownr	*Host Furniture: N/A
Comment:		

Residence Host page

Residence Number

Displays the default value, 1. Leave the default value as it is, unless you use a different numbering sequence. Each time that you insert a new data row for another residence, the system assigns the next number in the sequence, such as 2 or 3.

Edit Host Address

Click to edit the host residence address.

Host Residence Status

Select the host residence status.

Host Furniture

Select the disposition of the host furniture that is associated with the residence. Use a set of values that are different from those that are available for home residences. These values are in the Translate table.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, “Increasing the Workforce”

Tracking Home and Host Vehicle Information

Access the Vehicle Data page.

Yves Chabot Person ID: KF0018

Vehicle Information Find | View All First 1 of 1 Last

Begin Date: 11/01/1989 End Date: 09/16/1993 Type: Foreign

Home Vehicle Find | View All First 1 of 1 Last

*Vehicle #: 1 Description: + -

Comments On Vehicle Find | View All First 1 of 1 Last

*Effective Date: 04/24/2006 31 *Reason: + -

Comment: + -

Host Vehicle Find | View All First 1 of 1 Last

*Vehicle #: 1 Description: + -

Vehicle Information Find | View All First 1 of 1 Last

*Effective Date: 04/24/2006 31 *Reason: + -

*Vehicle Status: Date Available: 31 ☐ Cash In Lieu

Comment: + -

Vehicle Data page

Home Vehicle

Vehicle # (vehicle number) Displays the default value, 1. Leave the default value as is, unless you are using a different numbering sequence. Each time that you insert a new data row for another vehicle, the system assigns the next number in the sequence, such as 2 or 3.

Reason Enter the reason or status of the employee's vehicle.

Host Vehicle

Vehicle # (vehicle number) Displays the default value, 1. Leave the default value as is, unless you are using a different numbering sequence. Each time that you insert a new data row for another vehicle, the system assigns the next number in the sequence, such as 2 or 3.

Reason Select a reason for the status.

Vehicle Status Select a vehicle status by using a set of values that are different from those that are available for home vehicles. These values are also in the Translate table.

Date Available Enter the date on which the vehicle is available to the employee.

Cash in Lieu Select if the employee chooses to take cash instead of a company vehicle.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Company Cars, "Administering Company Cars for a Workforce"

Managing Company-Paid Travel for Employees on Assignment

This section discusses how to manage company-paid travel for employees on assignment.

Pages Used to Manage Company-Paid Travel for Employees on Assignment

Page Name	Object Name	Navigation	Usage
Company Paid Travel	TRAVEL_CMPNY_PAID	Workforce Administration, Global Assignments, Track Assignment, Company Paid Travel	Enter company-paid travel information.
Travel Company Dep (travel company dependents)	TRAVEL_CMPNY_DEP	Workforce Administration, Global Assignments, Track Assignment, Dependent Company Paid Travel	Track travel for which dependents of employees are eligible.

Managing Company-Paid Travel for Employees on Assignment

Access the Company Paid Travel page.

Company Paid Travel

Florence Gautier **Person ID:** KF0025

Company Paid Travel Details Find | View All First 1 of 1 Last

*Date Eligible: 11/03/2006
 Assignment Type: Foreign
 *Type of Travel:
 Amount/Currency: USD
 Date Taken:
 Begin Date: 11/01/1983 End Date: 12/31/1987
 *Mode of Travel: Air
☐ Cash In Lieu ☐ Alternate Location

From **To**

Country: USA USA
 State:
 City:

Accompanying Dependent Customize | Find | View All First 1 of 1 Last

*Dependent	Name	Relation	Birthdate	Marital Status

Company Paid Travel page

Note. If you don't see any data in these fields, then the date on which the employee is eligible for travel is after the end date that is entered in the assignment data for the current assignment. If the employee should be eligible for this travel during the assignment only, adjust either the date eligible here or the end date in the assignment data.

Date Eligible

Displays the date on which the employee is eligible for travel. Today's date appears automatically, which you can change.

Date Taken	Enter the date of travel.
Type of Travel	Enter one of the values that is created in the Travel Type table.
Mode of Travel	Enter one of the values that is created in the Translate table. <i>Air</i> appears by default, which you can change.
Amount/Currency	Enter the cost of the travel ticket or the maximum amount that the company authorizes for travel. The currency that is designated on the Installation Table - HRMS Options page appears by default, which you can change. Values are in the Currency Code table.
Cash In Lieu	Select if the employee opts for cash instead of company-paid travel.
Alternate Location	Select if the employee chooses to travel to a location other than his or her home domicile. If you select this check box, the To group box becomes available for alternate information entry.
	Note. This check box is available only if you select the Home Leave check box in the Travel Type table. The system displays the employee home domicile information from the Assignment Date page in the To group box.
Country	Enter the name of the country from which the employee is traveling. If you change the country code in either the From or To group box, the system clears the State and City fields so that you can enter new information. Enter a new data row, to track other instances of company-paid travel.
Dependent	Enter the appropriate dependent ID. To add more dependents, move the cursor to the Dependent field and click the Insert Row button.
Birthdate	Displays the dependent's date of birth.

Managing Dependent Information for Employees on Assignment

This section discusses how to:

- Enter dependent data.
- Enter and maintain data for accompanying dependents.
- View immediate family data.

Pages Used to Manage Dependent Information for Employees on Assignment

Page Name	Object Name	Navigation	Usage
Family at Host	FAMILY_AT_HOST	Workforce Administration, Global Assignments, Track Assignment, Dependent Accompanying, Family at Host	Enter family and dependent information.
Immediate Family	IMMEDIATE_FAMILY	Workforce Administration, Global Assignments, Track Assignment, Review Immediate Family Data, Immediate Family	View information about an employee's immediate family.
Dependent Data - Name	DEPEND_BENEF1	Workforce Administration, Global Assignments, Track Assignment, Dependent Data, Name	Add or edit dependent and beneficiary names.
Dependent Data - Address	DEPEND_BENEF_ADDR	Workforce Administration, Global Assignments, Track Assignment, Dependent Data, Name	Add or edit dependent and beneficiary addresses.
Dependent Data - Personal Profile	DEPEND_BENEF2	Workforce Administration, Global Assignments, Track Assignment, Dependent Data, Personal Profile	Add or edit dependent and beneficiary personal information.

Entering Dependent Data

Enter and maintain dependent information on the Dependent Data component (Workforce Administration, Global Assignments, Track Assignment, Dependent Data).

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce*, “Entering Additional Data in Human Resources Records,” Tracking Dependent and Beneficiary Data.

Entering and Maintaining Data for Accompanying Dependents

Access the Family at Host page.

Family at Host

Florence Gautier **Person ID:** KF0025

Family at Host Find | View All First 1 of 1 Last

*Effective Date: 31

Assignment Type: Foreign **Begin Date:** 11/01/1983 **End Date:** 12/31/1987

Family Size

Immediate:	0	Immediate at Host:	0	Total at Host:	0
-------------------	---	---------------------------	---	-----------------------	---

Dependents at Host Find | View All First 1 of 1 Last

*Dependent ID	Occupation	Birthdate	Marital Status	At Host
				☐

Family at Host page

Assignment Type, Begin Date and End Date

Displays the assignment type, begin date, and end date of the assignment, based on the effective date.

If these fields are not populated, then the information that you enter takes effect after the end date that is entered in the Assignment Data component. To see assignment data, adjust either the effective date here or the end date in Assignment Data.

Family Size

Displays the size of the immediate family, which is defined as dependents who are the employee's spouse, son, or daughter.

Dependent ID

Displays information about all dependents who are added by using the Dependent Data pages.

At Host

Displays the number of dependents who are accompanying the employee to the host location. The system automatically selects each dependent who is an immediate family member. Clear the At Host check box for any dependents who are not accompanying the employee to the host location.

Select the At Host check box for any nonfamily member, such as a nanny, who is accompanying the employee.

As you make changes to at host information, the system calculates and displays the number for immediate at host and the number for total at host, which includes any nonfamily members who are accompanying the employee.

Adding Dependents to the Host Location

To add another dependent to the Family at Host page, first add the new dependent by using the Dependent/Beneficiary pages. Move the cursor to the Effective Date field. When you enter the effective date of the change and move out of this field, the system refreshes the dependent list.

Removing Dependents from the Host Location

Access the Family at Host page. To reduce the number of dependents at host, click the Delete Row button and save the changes. The deleted dependents are removed from the list of dependents at host, but are still tracked in the system as dependent or beneficiaries for the given employee.

Viewing Immediate Family Data

Access the Immediate Family page.

Immediate Family

Ted Baer

Person ID: KUL401

Dependent / Beneficiary Data					
Dependent Name	Birthdate	Birthplace	Relation	Marital Status	Occupation
Thomas Baer	10/12/1981		Son	Single	
Benjamin Baer	10/12/1983		Son	Single	
Tamara Baer	01/06/1990		Daughter	Single	

Immediate Family page

The system displays the employee's name and employee ID, along with the names and birth information for all dependents who are in the employee's immediate family, their relationship to the employee, occupations (if any), and marital statuses.

Tracking Assignment Compensation and Currency Fluctuation

This section discusses how to track assignment compensation.

Warning! The Assignment Compensation page isn't linked to payroll processing in Payroll for North America.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Working with Currencies"

Page Used to Track Assignment Compensation and Currency Fluctuation

Page Name	Object Name	Navigation	Usage
Assignment Compensation	ASSGNMT_EARNS_DED	Workforce Administration, Global Assignments, Track Assignment, Assignment Compensation	Enter supplemental earnings and deductions that the home location pays, such as hardship premiums and relocation costs, or that an employee receives from the host location, such as foreign housing or rent.

Tracking Assignment Compensation

Access the Assignment Compensation page.

Assignment Compensation

Florence Gautier EmplID: KF0025 Payment Instruction Type: Onetime

Assignment Compensation Find | View All First 1 of 1 Last

*Effective Date: 11/01/1983 *Amount Frequency: A Annual

Assignment Type: Foreign

Begin Date: 11/01/1983 End Date: 12/31/1987

Home Employee Net Amount: 35387.00

Home / Host Find | View All First 1 of 1 Last

*Home or Host: 0 Home

*From Currency Code: FRF *To Currency Code: FRF

*Exchange Rate: 1.00000000 *Rate Type: OFFIC

Home/Host Net Amount: 35387.00

Earnings Find First 1 of 1 Last

*Code: AWA Award -- Cash Home Amount: 35387.00 Host Amount:

Deductions Find First 1 of 1 Last

*Code: Home Amount: Host Amount:

Assignment Compensation page

Amount Frequency

Enter the amount of compensation frequency from the values that are in the Frequency table. Values are *Annual*, *Hourly*, or *Monthly*. All the amounts that you specify for both earnings and deductions must be for the frequency that you select in this field.

Assignment Type

Displays the assignment type, which is based on the effective date that is entered on this page. If no information appears, then the information that you

enter takes effect after the end date that you enter in the Assignment Data component. A warning message appears.

If you make a onetime payment that occurs after the end date of the assignment, ignore the message. Otherwise, to see assignment data, adjust either the effective date here or the end date in the Assignment Data component.

Home or Host

Enter the employee record numbers that correspond to the home or host records. Generally, enter *0* for the home record and *1* for the host record.

From Currency Code and To Currency Code

If assignment data exists, in the From Currency Code field, view the currency for the country that is designated in the employee's home data.. View the home currency in the To Currency Code field. The system automatically populates these fields. Override these default values by selecting another currency code from the Currency Code table.

Exchange Rate

Displays the exchange rate type. The rate that is specified in the Installation table appears by default.

Rate Type

Displays the rate type. The rate type that is specified in the Installation table appears by default. You can override this default value.

Code

Enter a code that denotes additional earnings that are charged to the home location. Create these codes in the Earnings table.

Base Compensation

Displays the amount that the employee earns at the home location, which you specify in Job Data Compensation.

Home Amount

Enter the home amount. Because you are entering information about home data, the Host Amount field doesn't appear.

Base Compensation

Displays the amount that the employee earns at the home location, which you specify on the Job Data - Payroll page.

Code

Enter a code from the Deductions table that denotes deductions that should be taken from the employee compensation that you specify for the home location.

Home Amount

Enter the home amount for the deduction code.

The net earnings and deductions that are specified for the home location appear. The Home/Host Net Amount field displays the net amount of all supplemental earnings and deductions for both home and host. Both amounts appear in the home currency.

Because you are entering information that is related to home data, the Host Amount field doesn't appear.

CHAPTER 4

Managing Educational Allowances

This chapter discusses how to manage international schools and programs allowances.

Your organization may provide financial assistance to employees on global assignments, such as school tuition for children and language and orientation classes for adults. PeopleSoft Enterprise Human Resources helps determine any educational assistance to which employees are entitled and tracks multiple institutions.

Managing International Schools and Programs Allowances

This section discusses how to manage educational data.

Use the International School/Program and Intl School Dep pages to track educational allowances for your employees and their dependents.

Pages Used to Manage Educational Data

Page Name	Object Name	Navigation	Usage
International School/Program	INTL_SCHOOL_PROGRM	Workforce Administration, Global Assignments, Educational Allowances, International School/Program	Enter payment information.
Intl School Dep (international school dependents)	INTL_SCHOOL_DEP	Workforce Administration, Global Assignments, Educational Allowances, Dependent International School	Track beginning and end dates. Set up payment schedules for reimbursement in the designated currency.

Managing Educational Data

Access the International School/Program page.

International School/Program					
Florence Gautier Person ID: KF0025					
International School Program Details Find View All First 1 of 1 Last					
*School/Program Code: K00001	La Sorbonne Internal/External: E				
School/Program Type: Other	Begin Date: End Date:				
Amount: \$0.00 USD					
Payment Frequency:	Total Scheduled Amt: 0.00				
Payment Schedule Find View All First 1 of 1 Last					
Due Date	Total Amt	Employer Amt	Employee Amt	Paid	*Reimbrsmnt Status
	\$0.00	\$0.00	\$0.00	☐	Not Reimb

International School/Program page

School/Program Code	Enter a school/program code. When you complete this field, the system displays the school/program type and indicates whether the school is internal or external. Create this information in the International School/Program table.
Begin Date	Enter the period during which the employee attends the school or program.
Amount	Complete this field only if you pay in a lump sum; enter the total amount. If you set up a payment schedule, leave this field blank. Once you create the schedule, the system calculates and sets the amount to the total scheduled amount. The currency appears by default as the base currency that was designated on the Installation Table - HRMS Options page, which you can change. Currency codes are in the Currency Code table.
Payment Frequency	Enter a payment frequency, if you set up a payment schedule. Values are in the Translate table.
Total Scheduled Amt (total scheduled amount)	Displays the total that the system calculates as you enter the payment schedule. Save the information entered on the page; the system sets the amount to the total scheduled amount.
Payment Schedule	To add more payments, position your cursor in the Payment Schedule group box and click the Insert Row button.
Due Date	Enter the due date for each payment that is due.
Total Amt (total amount)	Enter the total amount of each payment.
Employer Amt (employer amount)	Enter the amount that the company pays.
Employee Amt (employee amount)	Displays the amount that the employee pays. If the total and employer amounts are different, when you complete the Employer Amt field, the system calculates and displays the employee amount.

Paid

Select when you've paid the total amount to the provider of the school or program.

Reimbrsmnt Status
(reimbursement status)

Select the status that reflects your organization's reimbursement policy for this particular payment. After you reimburse the employee, change the status from *Not Reimb* to *Reimbursed*. If the amount that the employee paid can't be reimbursed, select *Unreimb* (unreimbursable).

Glossary of PeopleSoft Enterprise Terms

absence entitlement	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
absence take	This element defines the conditions that must be met before a payee is entitled to take paid time off.
academic career	In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).
academic institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
academic organization	In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.
academic plan	In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.
academic program	In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.
accounting class	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
accounting date	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
accounting split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
action reason	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Enterprise Human Resources, PeopleSoft Enterprise Benefits

	Administration, PeopleSoft Enterprise Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
action template	In PeopleSoft Enterprise Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.
activity	In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities. In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing. In PeopleSoft Enterprise Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks. In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.
address usage	In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.
adjustment calendar	In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.
administrative function	In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.
admit type	In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.
agreement	In PeopleSoft Enterprise eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft Enterprise General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
analysis database	In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered

	for satisfying a requirement but that are rejected. It also contains information on courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.
Application Messaging	PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft Enterprise and third-party applications. An application message defines the records and fields to be published or subscribed to.
AR specialist	Abbreviation for <i>receivables specialist</i> . In PeopleSoft Enterprise Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	The arbiter when multiple price rules match the transaction. This plan determines the order in which the price rules are applied to the transaction base price.
assessment rule	In PeopleSoft Enterprise Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Enterprise Directory Interface, relates the data that makes up an entry in the directory information tree.
auction event	In PeopleSoft Strategic Sourcing, a sourcing event where bidders actively compete against one another to achieve the best price or score.
audience	In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Enterprise Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Enterprise Workforce Analytics Solution, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
bid response	In PeopleSoft Strategic Sourcing, the response by a bidder to an event.
billing career	In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.
bio bit or bio brief	In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.
book	In PeopleSoft Enterprise Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."

budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business activity	The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.
business event	In PeopleSoft Enterprise Receivables, defines the processing characteristics for the Receivable Update process for a draft activity. In PeopleSoft Enterprise Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
business process	A standard set of 17 business processes are defined and maintained by the PeopleSoft Enterprise product families and are supported by the Business Process Engineering group. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth. See also <i>detailed business process</i>.
business unit constraints	In PeopleSoft Strategic Sourcing, these constraints apply to a selected Strategic Sourcing business unit. Spend is tracked across all of the events within the selected Strategic Sourcing business unit.
business task	The name of the specific function depicted in one of the business processes.
business unit	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
buyer	In PeopleSoft Enterprise eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
buy event	In PeopleSoft Strategic Sourcing, for event creators, the purchase of goods or services, most typically associated with a request for quote, proposal, or reverse auction. For bidders, the sale of goods or services.
campus	In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.
cash drawer	A repository for monies and payments taken locally.
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.
catalog map	In PeopleSoft Enterprise Catalog Management, translates values from the catalog source data to the format of the company's catalog.

catalog partner	In PeopleSoft Enterprise Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
categorization	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
category	In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.
channel	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft Enterprise application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.
ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
checkbook	In PeopleSoft Enterprise Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
checklist code	In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.
claimback	In the wholesale distribution industry, a contract between supplier and distributor, in which monies are paid to the distributor on the sale of specified products or product groups to targeted customers or customer groups.
class	In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term. See also <i>course</i> .
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
clearance	In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Enterprise Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.
clone	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
cohort	In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>division</i> .

collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleTools maintains a set of collections (one per language code) for each search index object.
collection rule	In PeopleSoft Enterprise Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.
comm key	See <i>communication key</i> .
communication key	In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called <i>comm keys</i> or <i>speed keys</i>) can be created for background processes as well as for specific users.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
component interface	A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft Enterprise database information using a program instead of the PeopleSoft client.
condition	In PeopleSoft Enterprise Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
configuration parameter catalog	Used to configure an external system with PeopleSoft Enterprise. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
constituents	In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).
constraint	A business policy or rule that affects how a sourcing event is awarded. There are three types of constraints: business, global, and event.
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running. In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to

	3C access groups so that you can assign data-entry or view-only privileges across functions.
	In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost plus contract line	A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines.
cost plus pricing	In PeopleSoft Enterprise Pricer, a pricing method that begins with cost of goods as the basis.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.
counter sale	A face-to-face customer transaction where the customer typically selects items from the storefront or picks up products that they ordered ahead of time. Customers pay for the goods at the counter and take the goods with them instead of having the goods shipped from a warehouse.
course	In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab. See also <i>class</i> .
course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data cube	In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method	In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method. In PeopleSoft Enterprise Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, and rail). The delivery method is specified when creating shipment schedules.
delivery method type	In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.
detailed business process	A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.
dimension	In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.
direct receipt	Items shipped from a warehouse or vendor to another warehouse.
direct ship	Items shipped from the vendor or warehouse directly to the customer (formerly referred to as <i>drop ship</i>).
directory information tree	In PeopleSoft Enterprise Directory Interface, the representation of a directory's hierarchical structure.
division	In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>cohort</i>.
document sequencing	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft Enterprise application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft Enterprise applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM ledger	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

elimination set	In PeopleSoft Enterprise General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft Enterprise General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.
equitization	In PeopleSoft Enterprise General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.
equity item limit	In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.
event	A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete. In PeopleSoft Enterprise Human Resources, also refers to an incident that affects benefits eligibility.
event constraints	In PeopleSoft Strategic Sourcing, these constraints are associated with a specific sourcing event. Spend is tracked within the selected event.
event propagation process	In PeopleSoft Enterprise Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. PeopleSoft Enterprise Enterprise Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
exception	In PeopleSoft Enterprise Receivables, an item that either is a deduction or is in dispute.
exclusive pricing	In PeopleSoft Enterprise Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
fact	In PeopleSoft Enterprise applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
financial aid term	In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.
financial sanctions	For U.S. based companies and their foreign subsidiaries, a federal regulation from the Office of Foreign Assets Control (OFAC) requires that vendors be validated against a Specially Designated Nationals (SDN) list prior to payment. For PeopleSoft Payables, eSettlements, Cash Management, and Order to Cash, you can validate your vendors against any financial sanctions list (for example, the SDN list, a European Union list, and so on).
forecast item	A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.

fund	In PeopleSoft Enterprise Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.
gap	In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
gift table	In PeopleSoft Enterprise Campus Solutions, a table or so-called <i>donor pyramid</i> describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Enterprise Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.
GDS	Abbreviation for <i>Global Distribution System</i> . Broad-based term to describe all computer reservation systems for making travel plans.
GL business unit	Abbreviation for <i>general ledger business unit</i> . A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books. See also <i>business unit</i> .
GL entry template	Abbreviation for <i>general ledger entry template</i> . In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.
GL Interface process	Abbreviation for <i>General Ledger Interface process</i> . In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.
global constraints	In PeopleSoft Strategic Sourcing, these constraints apply across multiple Strategic Sourcing business units. Spend is tracked across all of the events from the multiple Strategic Sourcing business units.
group	In PeopleSoft Enterprise Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs). In PeopleSoft Enterprise Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Enterprise Time and Labor, for example, employees are placed in groups for time reporting purposes.
ideal response	In PeopleSoft Strategic Sourcing, a question that requires the response to match the ideal value for the bid to be considered eligible for award. If the response does not match the ideal value, you can still submit the bid, but it will be disqualified and ineligible for award.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, and user interaction objects.

incentive rule	In PeopleSoft Enterprise Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
incur	In PeopleSoft Enterprise Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
initiative	In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.
inquiry access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data. See also <i>update access</i> .
institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
integration	A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft Enterprise applications to work seamlessly with other PeopleSoft Enterprise applications or with third-party systems or software.
integration point	An interface that a system uses to communicate with another PeopleSoft Enterprise application or an external application.
integration set	A logical grouping of integrations that applications use for the same business purpose. For example, the integration set <code>ADVANCED_SHIPPING_ORDER</code> contains all of the integrations that notify a customer that an order has shipped.
item	In PeopleSoft Enterprise Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse). In PeopleSoft Enterprise Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained. In PeopleSoft Enterprise Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.
item shuffle	In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.
itinerary	In PeopleSoft Expenses, a collection of travel reservations. Itineraries can have reservations that are selected and reserved with the travel vendor. These itineraries are not yet paid for and can be referred to as <i>pending reservations</i> . Reservations that have been paid for are referred to as <i>confirmed reservations</i> .
joint communication	In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.

keyword	In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Enterprise Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.
KPI	An abbreviation for <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.
KVI	Abbreviation for <i>Known Value Item</i> . Term used for products or groups of products where the selling price cannot be reduced or increased.
landlord	In PeopleSoft Real Estate Management, an entity that owns real estate and leases the real estate to tenants.
LDIF file	Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft Enterprise data and directory data.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.
learning components	In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.
learning environment	In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.
lease	In PeopleSoft Real Estate Management, a legally binding agreement between a landlord and a tenant, where the tenant rents all or part of a physical property from the landlord.
lease abstract	In PeopleSoft Real Estate Management, a summarized version of the complete lease contract with only the important terms. The lease abstract usually fits on one page and does not include legal terminology.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
line	In PeopleSoft Strategic Sourcing, an individual item or service upon which there can be a bid.

linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
LMS	Abbreviation for <i>learning management system</i> . In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Enterprise Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.
load	In PeopleSoft Enterprise Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Enterprise Inventory that is used to track the weight, the volume, and the destination of a shipment.
local functionality	In PeopleSoft Enterprise HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a <i>1</i> —is the address you use most often and may be different from the main address.
logistical task	In PeopleSoft Enterprise Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
mass change	In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution. See also <i>3C engine</i> .
match group	In PeopleSoft Enterprise Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.
MCF server	Abbreviation for <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration.
merchandising activity	In PeopleSoft Enterprise Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

meta-SQL	Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
metastring	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	In PeopleSoft Enterprise General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
national allowance	In PeopleSoft Enterprise Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.
NDP	Abbreviation for <i>Non-Discountable Products</i> . Term used for products or groups of products where the selling price cannot be decreased.
need	In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called <i>need analysis</i> .
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
Optimization Engine	A PeopleTools component that Strategic Sourcing leverages to evaluate bids and determine an ideal award allocation. The award recommendation is based on maximizing the value while adhering to purchasing and company objectives and constraints.
pagelet	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft Enterprise and non-PeopleSoft Enterprise content.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also <i>compensation object</i> .
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Enterprise Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
payment shuffle	In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.
pending item	In PeopleSoft Enterprise Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft Enterprise component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft Enterprise applications wherever PeopleCode can be executed.
PeopleCode event	See <i>event</i> .
PeopleSoft Pure Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
person of interest	A person about whom the organization maintains information but who is not part of the workforce.
personal portfolio	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.
phase	A level 1 task, meaning that if a task had subtasks, the level 1 task would be considered the phase.
pickup quantity	The product quantity that the customer is taking with them from the counter sales environment.
plan	In PeopleSoft Enterprise Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Enterprise Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
population	In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and

	Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it. See also <i>division</i> and <i>cohort</i> .
portal registry	In PeopleSoft Enterprise applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
predecessor task	A task that you must complete before you start another task.
price breaks	In PeopleSoft Strategic Sourcing, a price discount or surcharge that a bidder may apply based on the quantity awarded.
price components	In PeopleSoft Strategic Sourcing, the various components, such as material costs, labor costs, shipping costs, and so on that make up the overall bid price.
price list	Enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	The conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.
price rule conditions	Conditions that select the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields relate to the transaction.
price rule key	The fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
primacy number	In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.
primary name type	In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Enterprise Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.

process request	A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product	A PeopleSoft Enterprise or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products appear with the product name and release number.
product adds	The pricing functionality where buying product A gets product B for free or at a price (formerly referred to as <i>giveaways</i>).
product bidding	In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the PeopleSoft Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
product family	A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are Oracle's PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified partners.
product line	The name of a PeopleSoft Enterprise product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.
progress log	In PeopleSoft Enterprise Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
project transaction	In PeopleSoft Enterprise Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Enterprise Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
prospects	In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution. In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.
proxy bidding	In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.

publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
rating components	In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Enterprise Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Enterprise Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Enterprise Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
recname	The name of a record that is used to determine the associated field to match a value or set of values.
recognition	In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.
reference data	In PeopleSoft Enterprise Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, and channels.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
regional sourcing	In PeopleSoft Enterprise Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.
relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
remote data source data	Data that is extracted from a separate database and migrated into the local database.

REN server	Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
requester	In PeopleSoft Enterprise eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
reservations	In PeopleSoft Expenses, travel reservations that have been placed with the travel vendor.
reversal indicator	In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.
RFI event	In PeopleSoft Strategic Sourcing, a request for information.
RFx event	In PeopleSoft Strategic Sourcing, a request for proposal or request for a quote event when bidders submit their overall best bids and during which bidders do not actively compete against one another.
role	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
role user	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
run control	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
run control ID	A unique ID to associate each user with his or her own run control table entries.
run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
saved bid	In PeopleSoft Strategic Sourcing, a bid that has been created but not submitted. Only submitted bids are eligible for award.
score	In PeopleSoft Strategic Sourcing, the numerical sum of answers (percentages) to bid factors on an event. Scores appear only to bidders on auction events.
SCP SCBM XML message	Abbreviation for <i>Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message</i> . Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
search/match	In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.
seasonal address	In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.

section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
sell event	In PeopleSoft Strategic Sourcing, for event creators, the sale of goods or services most typically associated with forward auctions. For bidders, the purchase of goods or services.
serial genealogy	In PeopleSoft Enterprise Manufacturing, the ability to track the composition of a specific, serial-controlled item.
serial in production	In PeopleSoft Enterprise Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
service impact	In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.
service indicator	In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.
session	In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Enterprise Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements. In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
share driver expression	In PeopleSoft Enterprise Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.
short-term customer	A customer not in the system who is entered during sales order entry using a template.

single signon	With single signon, users can, after being authenticated by a PeopleSoft Enterprise application server, access a second PeopleSoft Enterprise application server without entering a user ID or password.
source key process	In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.
source transaction	In commitment control, any transaction generated in a PeopleSoft Enterprise or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
sourcing objective	For constraints, the option to designate whether a business rule is required (mandatory) or is only recommended (target).
speed key	See <i>communication key</i> .
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.
standard letter code	In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft Enterprise, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Enterprise Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
storage level	In PeopleSoft Enterprise Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
subcustomer qualifier	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary time period	In PeopleSoft Enterprise Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.
system function	In PeopleSoft Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger.
system source	The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch). When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft Enterprise system. For example, processes that import data from Microsoft Project into PeopleSoft Enterprise applications create transaction rows with a source code of MSP (Microsoft Project).
TableSet	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
TableSet sharing	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
task	A deliverable item on the detailed sourcing plan.
tax authority	In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.
template	A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft Enterprise, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft Enterprise portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
tenant	In PeopleSoft Real Estate Management, an entity that leases real estate from a landlord.
territory	In PeopleSoft Enterprise Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
third party	A company or vendor that has extensive PeopleSoft Enterprise product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft Enterprise applications.
tiered pricing	Enables different portions of a schedule to be priced differently from one another.
time span	A relative period, such as year-to-date or current period, that various PeopleSoft General Ledger functions and reports can use when a rolling time frame, rather than a specific date, is required.
total cost	In PeopleSoft Strategic Sourcing, the estimated dollar cost (sum of real price dollars and potential “soft” or non-price dollars) of a particular award approach.

travel group	In PeopleSoft Expenses, the organization's travel rules and policies that are associated with specific business units, departments, or employees. You must define at least one travel group when setting up the PeopleSoft Expenses travel feature. You must define and associate at least one travel group with a travel vendor.
travel partner	In PeopleSoft Expenses, the travel vendor with which the organization has a contractual relationship.
3C engine	Abbreviation for <i>Communications, Checklists, and Comments engine</i> . In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.
3C group	Abbreviation for <i>Communications, Checklists, and Comments group</i> . In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.
trace usage	In PeopleSoft Enterprise Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and "picked up" by a different section for further processing.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft Enterprise systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
tuition lock	In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or <i>locked</i>) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
universal navigation header	Every PeopleSoft Enterprise portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.
update access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.

See also *inquiry access*.

user interaction object	In PeopleSoft Enterprise Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All PeopleSoft Enterprise Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).
variable	In PeopleSoft Enterprise Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This term refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft Enterprise data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
weight or weighting	In PeopleSoft Strategic Sourcing, how important the line or question is to the overall event. Weighting is used to score and analyze bids. For RFx and RFI events, weightings may or may not appear to bidders.
work order	In PeopleSoft Enterprise Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worker	A person who is part of the workforce; an employee or a contingent worker.
workset	A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.
worksheet	A way of presenting data through a PeopleSoft Enterprise Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
worklist	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.
XML link	The XML Linking language enables you to insert elements into XML documents to create a links between resources.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
XPI	Abbreviation for <i>eXtended Process Integrator</i> . PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with JD Edwards EnterpriseOne applications.

yield by operation

In PeopleSoft Enterprise Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

zero-rated VAT

Abbreviation for *zero-rated value-added tax*. A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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