
PeopleSoft HCM 9.2: Human Resources Track Global Assignments

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PeopleSoft HCM 9.2: Human Resources Track Global Assignments
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Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the [Oracle Help Center](#). The hosted PeopleSoft Online Help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see [Configuring Context-Sensitive Help Using the Hosted Online Help Website](#).

Locally Installed Help

If you're setting up an on-premise PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. See [Configuring Context-Sensitive Help Using a Locally Installed Online Help Website](#).

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the [Oracle Help Center](#). The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals
- Using PeopleSoft Applications

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

Typographical Convention	Description
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.
... (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 ().
[] (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.
=>	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation

does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

Information that applies only to a specific 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 region-specific heading: "(Latin America) Setting Up Depreciation"

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- 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 the PeopleSoft Online Help:

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

Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

Using and Managing the PeopleSoft Online Help

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help
- Managing Hosted online help
- Managing locally installed PeopleSoft Online Help

PeopleSoft HCM Application Fundamentals

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

Related Links for PeopleSoft HCM

[Oracle Help Center](#)

[PeopleSoft Information Portal](#)

[My Oracle Support](#)

[PeopleSoft Training from Oracle University](#)

[PeopleSoft Video Feature Overviews on YouTube](#)

[PeopleSoft Business Process Maps \(Microsoft Visio format\)](#)

[PeopleSoft Spotlight Series](#)

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Chapter 1

Getting Started with Track Global Assignments

Track Global Assignments Business Process Overview

Track Global Assignments business process in PeopleSoft HR 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.

These topics provide an overview of global assignment tracking and discuss:

- 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 HR 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 end. 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 "Understanding Job Data" (PeopleSoft HCM 9.2: Human Resources Administer 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.

Related Links

"Adding Organizational Instances for Employees, Contingent Workers, and POIs" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)

"Understanding the Process of Updating Person and Job Information" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)

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.

Related Links

[Understanding Global Assignment Tracking](#)

[Managing International Schools and Programs Allowances](#)

Track Global Assignments Business Process Integrations

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

Human Resources shared tables are available to many PeopleSoft HCM applications. In addition, data in many HR 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 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.

Refer to the *PeopleSoft HCM 9.2 - Reorganization of Component Interface Permissions* (Doc ID [2342162.1](#)) MOS posting for a list of system-delivered CIs and their usage, the mapping of CIs and associated permission lists, and the mapping of CI permission lists and user roles.

See the product documentation for *PeopleTools: Setup Manager*

Related Links

Application Fundamentals

Chapter 2

Setting Up Global 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 "Understanding PeopleSoft Security" (PeopleSoft HCM 9.2: Application Fundamentals).

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.

<i>Home/Host Access Type</i>	<i>Data Tied to Home Job Data</i>	<i>Data Tied to Host Job Data</i>
No Home/Host Security Option	Eastern BU users*	Australia BU users**
Home can see Host	Eastern BU users	<ul style="list-style-type: none">• Australia BU users• Eastern BU users

<i>Home/Host Access Type</i>	<i>Data Tied to Home Job Data</i>	<i>Data Tied to Host Job Data</i>
Host can see Home	<ul style="list-style-type: none"> Eastern BU users Australia BU users 	Australia BU users
Both (Home can see Host and Host can see Home)	<ul style="list-style-type: none"> Eastern BU users Australia BU users 	<ul style="list-style-type: none"> 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 many 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 "Implementing Data Permission Security" (PeopleSoft HCM 9.2: Application Fundamentals).

Defining Global Assignment Types

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

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

Page Used to Define Global Assignment Types

Page Name	Definition Name	Usage
Assignment Type Table Page	ASSGN_TYPE_TABLE	Create new types of employee assignments.

Assignment Type Table Page

Use the Assignment Type Table page (ASSGN_TYPE_TABLE) to create new types of employee assignments.

Navigation

Set Up HCM > Product Related > Workforce Administration > Global Assignments > Assignment Type Table > Assignment Type Table

Image: Assignment Type Table page

This example illustrates the fields and controls on the Assignment Type Table page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Assignment Type Table' page. At the top, it says 'Assignment Type D02'. Below that, there's a search bar with 'Find | View All' and navigation buttons for 'First', '1 of 1', and 'Last'. The main form has the following fields:

- *Effective Date: 01/01/1900 (with a calendar icon)
- *Status: Active (dropdown menu)
- *Description: Business Trip Out-of-Country
- Short Description: Bus Out-Cn

(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

Type	Description
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 topic discusses how to classify types of company-paid travel.

Pages Used to Classify Types of Company-Paid Travel

Page Name	Definition Name	Usage
Travel Type Table Page	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.

Travel Type Table Page

Use the Travel Type Table page (TRAVEL_TYPE_TABLE) to 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.

Navigation

Set Up HCM > Product Related > Workforce Administration > Global Assignments > Travel Type Table > Travel Type Table

Image: Travel Type Table page

This example illustrates the fields and controls on the Travel Type Table page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Travel Type Table' interface. At the top, it says 'Type of Travel K01'. Below that is a table with the following columns: *Effective Date, *Status, *Description, Short Description, and Home Leave. The first row contains the values: 01/01/1980, Active, Home Leave, Home Leave, and a checked checkbox for Home Leave. There are also navigation controls like 'First', '1 of 1', and 'Last'.

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 <i>Home Leave</i> , 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.

These topics discuss assignment deductions and earnings.

Pages Used to Define Deductions and Earnings for Assignment Compensation

Page Name	Definition Name	Usage
<u>Deduction Table Page</u>	DEDUCTION_TABLE1	Add deduction codes and classification information.
<u>Deduction Table2 Page</u>	DEDUCTION_TABLE2	Define tax treatments for assignment deductions.
<u>Earnings Table Page</u>	EARNINGS_TABLE1	Add earnings codes for global assignments.

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 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 [Deduction Table Page](#).

Note: Use the Payroll for North America Earnings and Deductions tables (Set Up HCM, 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.

Related Links

"Understanding Earnings Tables" (PeopleSoft HCM 9.2: Payroll for North America)

[Deduction Table Page](#)

[Tracking Assignment Compensation and Currency Fluctuation](#)

Deduction Table Page

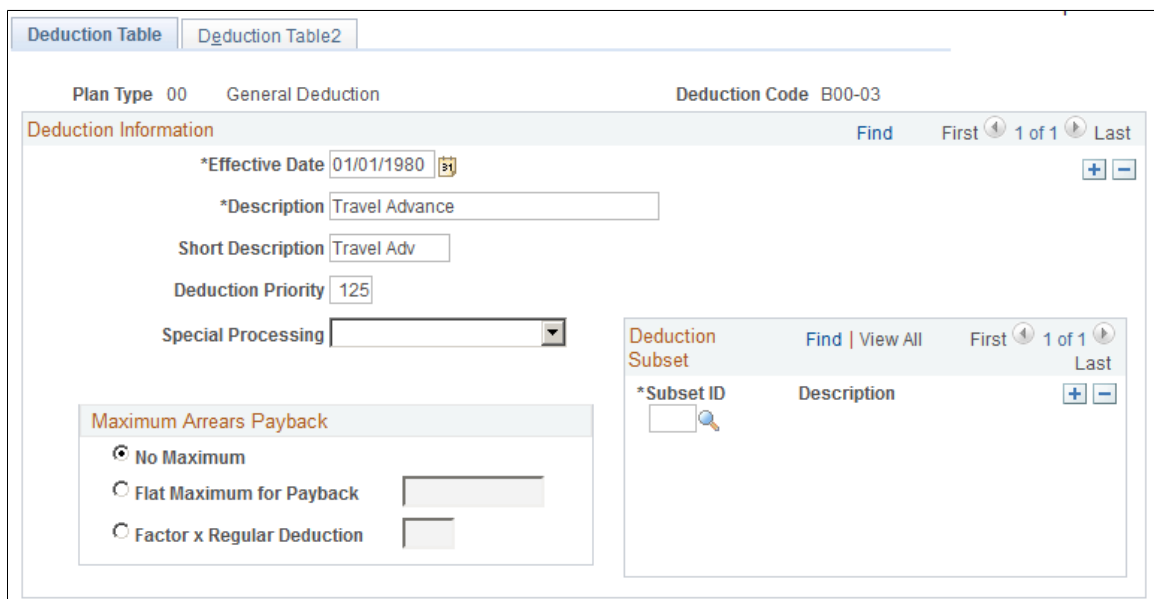
Use the Deduction Table page (DEDUCTION_TABLE1) to add deduction codes and classification information.

Navigation

Set Up HCM > Product Related > Workforce Administration > Global Assignments > Deductions > Deduction Table

Image: Deduction Table page

This example illustrates the fields and controls on the Deduction Table page. You can find definitions for the fields and controls later on this 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.

Deduction Table2 Page

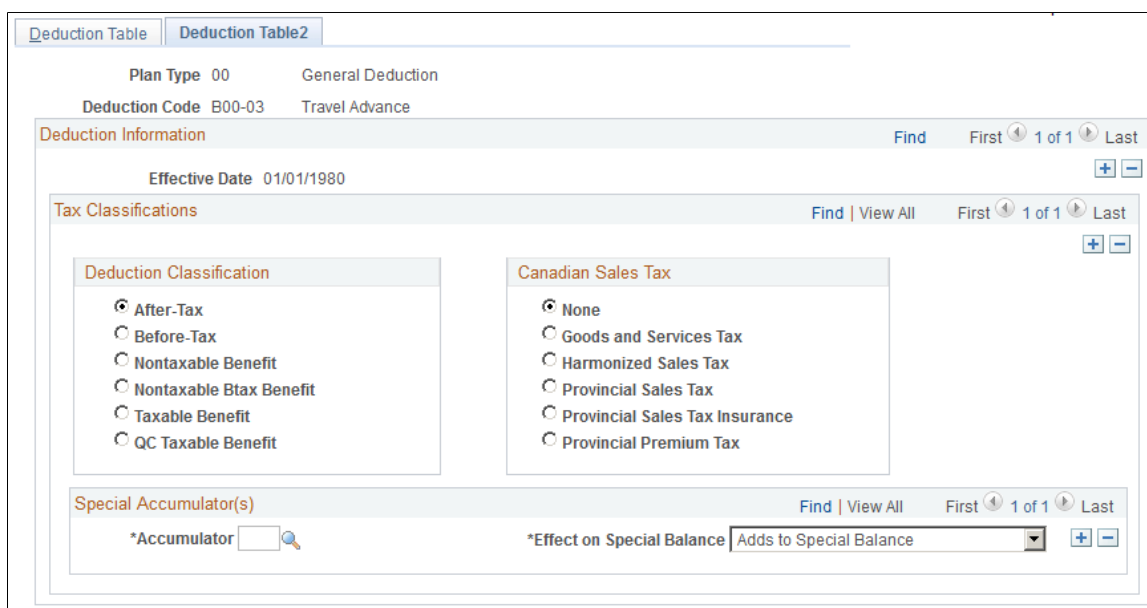
Use the Deduction Table2 page (DEDUCTION_TABLE2) to define tax treatments for assignment deductions.

Navigation

Set Up HCM > Product Related > Workforce Administration > Global Assignments > Deductions > Deduction Table2

Image: Deduction Table2 page

This example illustrates the fields and controls on the Deduction Table2 page. You can find definitions for the fields and controls later on this page.



Deduction Classification

Select a deduction type.

Canadian Sales Tax

Select the type that is required in Canada.

Earnings Table Page

Use the Earnings Table page (EARNINGS_TABLE1) to add earnings codes for global assignments.

Navigation

Set Up HCM > Product Related > Workforce Administration > Global Assignments > Earnings > Earnings Table

Image: Earnings Table page

This example illustrates the fields and controls on the Earnings Table page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Earnings Table' page for Earnings Code 'AUT'. It includes a search bar with 'Find', 'First', '1 of 1', and 'Last' buttons. The main form contains the following fields and controls:

- *Effective Date:** 01/01/1980 (with a calendar icon)
- *Status:** Active (dropdown menu with + and - buttons)
- *Description:** Automobile Allowance
- Short Description:** Auto Allow
- *Allowable Employee Types:** All Types Allowable (dropdown menu)
- 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

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.

These topics discuss assignment education data.

Pages Used to Set Up Assignment Educational Data

Page Name	Definition Name	Usage
School/Program Table Page	INTL_SCHPGM_TABLE	Enter school and program information.

Page Name	Definition Name	Usage
<u>School/Program Contact Table Page</u>	INTL_CONTACT_TABLE	Track contacts for schools and programs. You must already have set up information for international schools and programs in the School/Program table.
Majors Page	MAJOR_TABLE	Include areas of study most commonly associated with school degrees or certificates.

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 HR 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 Majors page if you need to set up a new major for global assignments.

See "Understanding Managing Profiles" (PeopleSoft HCM 9.2: Human Resources Manage Profiles).

School/Program Table Page

Use the School/Program Table page (INTL_SCHPGM_TABLE) to enter school and program information.

Navigation

Set Up HCM > Product Related > Workforce Administration > Global Assignments > Define Education Related Info > School/Program Table > School/Program Table

Image: School/Program Table page

This example illustrates the fields and controls on the School/Program Table page. You can find definitions for the fields and controls later on this page.

School/Program Table
School/Program Code K00003

Program Table Details Find | View All First 1 of 1 Last

*Effective Date 01/01/1980
*Description The British Council Schl Spain
*Sch/Pgm Typ Private School
*Status Active
Short Description BC Madrid
*Int/Ext External

Address

Country ESP Spain
Address Promenade del General Martinez Campos, 31.
28010- Madrid. Madrid [Edit Address](#)

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*.

Related Links

"Understanding Local Country Functionality Setup" (PeopleSoft HCM 9.2: Application Fundamentals)

School/Program Contact Table Page

Use the School/Program Contact Table page (INTL_CONTACT_TABLE) to track contacts for schools and programs.

You must already have set up information for international schools and programs in the School/Program table.

Navigation

Set Up HCM > Product Related > Workforce Administration > Global Assignments > Define Education Related Info > School/Program Contact Table > School/Program Contact Table

Image: School/Program Contact Table page

This example illustrates the fields and controls on the School/Program Contact Table page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'School/Program Contact Table' interface. At the top, it shows 'School/Program Code K00003 The British Council Schi Spain'. Below this, there are two main sections:

- Program Contact Table Details:** This section includes a 'Find | View All' button and navigation controls for 'First', '1 of 1', and 'Last'. It contains the following fields:
 - *Contact Nbr: 1
 - *Name: Labertino, Christophe
 - Title: Dean
 - Contact Type: Primary
- Contact Phone Numbers:** This section also has 'Find | View All' and navigation controls. It contains:
 - *Phone Type: Main (selected in a dropdown menu)
 - Phone: 331235843

Contact Nbr (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

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 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 HR system for the employee.

Creating Checklists

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

This topic discusses creating checklists.

Pages Used to Create Checklists

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Checklist Items Page	CHKLST_ITEM_TABLE	Define items that could appear on a checklist.
Checklist Page	CHECKLIST_TABLE	Define employee checklists.
"Person Assignment Checklist Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)	EMPLOYEE_CHECKLIST	Identify checklist items to use as a guide to process employees.
"Person Checklist Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)	PERSON_CHECKLIST	Identify checklist items to use as a guide to process people.

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 Items and Checklist pages. To tailor a checklist for an employee, use the Person Checklist page.

Related Links

"Creating Checklists" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)

Managing Employee Home and Host Data

These topics discuss managing employee home and host data.

Pages Used to Manage Employee Home and Host Data

Page Name	Definition Name	Usage
<u>Add Host Assignment Page</u>	PER_ORG_INST_ASGN	Add a host assignment and review a summary of an employee's home and host assignments.
<u>Home/Host Data Page</u>	HOME_HOST_DATA	<p>Add or view home information, and view and update host information.</p> <p>The page accessed from the button is an enterable page. The page accessed from the menu navigation path is a view-only page.</p> <p>Home data comes from the job data pages. You must have created an employment instance for the employee.</p> <p>You must establish a host employment record to manage assignments from the Assignment Data component.</p>
<u>Payroll Data Page</u>	JOB_DATA_2	<p>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.</p> <p>The page accessed from the button is an enterable page. The page accessed from the menu navigation path is a view-only page.</p>

Page Name	Definition Name	Usage
<u>Assignment Page</u>	HOME_HOST_ASGN	<p>Add or view host assignment data. You must have already created an employment instance for this employee.</p> <p>The page accessed from the button is an enterable page. The page accessed from the menu navigation path is a view-only page.</p> <p>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.</p>
Global Assignment Detail Page	ASGN_VLD_VW	<p>Associate the current host with the selected assignment.</p> <p>The Choose an Existing Assignment link appears only when you are in Correction mode.</p>
<u>Benefits Page</u>	JOB_DATA_BENPRG	<p>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.</p> <p>The page accessed from the button is an enterable page. The page accessed from the menu navigation path is a view-only page.</p>
"Work Location Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)	JOB_DATA1	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 HR 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.

Related Links

"Adding Organizational Instances for Employees, Contingent Workers, and POIs" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)

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.

Related Links

"Understanding Managing Profiles" (PeopleSoft HCM 9.2: Human Resources Manage 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 [Defining and Maintaining Host Location Information](#).

- 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.

Related Links

"Updating Job Data" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)

Add Host Assignment Page

Use the Add Host Assignment page (PER_ORG_INST_ASGN) to add a host assignment and review a summary of an employee's home and host assignments.

Navigation

Workforce Administration > Global Assignments > Track Assignment > Add a Host Assignment > Add Host Assignment

Image: Add Host Assignment page

This example illustrates the fields and controls on the Add Host Assignment page. You can find definitions for the fields and controls later on this page.

Add Host Assignment
 Patrick Seto Person ID KU0011

Organizational Instance Find | View All First 1 of 1 Last

Organizational Relationship Employee **Create Host Assignment**

Organizational Instance 0

HR Status Active Next Empl Rcd

Pay Status Active

Effective Date 11/10/2008

Business Unit GBIBU Global Business Institute BU

Department 16000 Corporate Legal

Company GBI Global Business Institute

Last Start 01/02/1980

Assignments Personalize | Find | First 1 of 1 Last

Empl Record▲	HR Status	Effective Date	Business Unit	Department	Home/Host
0	Active	11/10/2008	GBIBU	16000	Home

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.

Empl Record (employee record)

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.

Home/Host Data Page

Use the Home/Host Data page (HOME_HOST_DATA) to add or view home information, and view and update host information.

The page accessed from the button is an enterable page. The page accessed from the menu navigation path is a view-only page.

Home data comes from the job data pages. You must have created an employment instance for the employee.

You must establish a host employment record to manage assignments from the Assignment Data component.

Navigation

- Click the Create Host Assignment button on the Add Host Assignment page.
- Workforce Administration > Global Assignments > Track Assignment > Home and Host Data > Home/Host Data

Image: Home/Host Data page

This example illustrates the fields and controls on the Home/Host Data page. You can find definitions for the fields and controls later on this 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 "Defining Personnel Actions and Reasons" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).

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 "Defining Personnel Actions and Reasons" (PeopleSoft HCM 9.2: Human Resources Administer Workforce) and "Action Reasons Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).

Payroll Data Page

Use the Payroll Data page (JOB_DATA_2) to 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.

The page accessed from the button is an enterable page. The page accessed from the menu navigation path is a view-only page.

Navigation

- Click the Create Host Assignment button on the Add Host Assignment page, and then select the Payroll Data page.
- Workforce Administration > Global Assignments > Track Assignment > Home and Host Data > Payroll Data

Image: Payroll Data page

This example illustrates the fields and controls on the Payroll Data page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Home/Host Data' page for employee Patrick Seto (Empl ID KU0011). The 'Payroll Data' tab is active, showing payroll information for the system 'Payroll for North America'. Key fields include:

- Payroll Information:** Effective Date (01/02/2014), Effective Sequence (0), HR Status (Active), Payroll Status (Active), Action (Assignment), Reason, and Job Indicator (Secondary Job).
- System Selection:** *Payroll System (Payroll for North America) and Absence System (Other).
- Payroll for North America Details:** Pay Group (KU2), Employee Type (H), Tax Location Code (E-001), GL Pay Type, Holiday Schedule (KU01), *Tipped (Not Tipped), and FICA Status (Subject).

Navigation buttons (OK, Cancel, Apply) are located at the bottom of the form.

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.

Related Links

"Payroll Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)

Assignment Page

Use the Assignment page (HOME_HOST_ASGN) to add or view host assignment data.

You must have already created an employment instance for this employee.

The page accessed from the button is an enterable page. The page accessed from the menu navigation path is a view-only page.

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.

Navigation

- Click the Create Host Assignment button on the Add Host Assignment page , and then select the Assignment page.
- Workforce Administration > Global Assignments > Track Assignment > Home and Host Data > Assignment

Image: Assignment page

This example illustrates the fields and controls on the Assignment page. You can find definitions for the fields and controls later on this 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.

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.

Benefits Page

Use the Benefits page (JOB_DATA_BENPRG) to 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.

The page accessed from the button is an enterable page. The page accessed from the menu navigation path is a view-only page.

Navigation

- Click the Create Host Assignment button on the Add Host Assignment page, and then select the Benefits page.
- Workforce Administration > Global Assignments > Track Assignment > Home and Host Data > Benefits

Image: Benefits page

This example illustrates the fields and controls on the Benefits page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Benefits' page for employee Patrick Seto (Empl ID KU0011). The page is divided into several sections:

- Home/Host Data:** Shows the employee's name, Empl ID (KU0011), and Empl Record (1).
- Benefit Status:** Includes fields for Benefit Record Number (0), Effective Date (01/02/2014), Effective Sequence (0), HR Status (Active), Payroll Status (Active), Action (Assignment), Reason, and Job Indicator (Secondary Job). It also features a dropdown for Benefits System (Benefits Administration) and a field for Annual Benefits Base Rate (USD).
- Benefits Administration Eligibility:** Contains a BAS Group ID field (B01) and nine Elig Fld (Elig Fld 1 through Elig Fld 9) fields.
- Benefit Program Participation:** Includes fields for Effective Date (01/02/1980), Currency Code (USD), and Benefit Program (KU1).

At the bottom of the page, there are buttons for 'OK', 'Cancel', and 'Apply'.

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.

Related Links

"Benefit Program Participation Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)

Managing Assignments with Multiple Home or Host Data Records

These topics discuss 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 of the Home and Host Data component using the employee record number for the host that you want to associate with an assignment.
2. Click the Correct History button.

To use Correct History, navigate to the Home and Host Data component and access the correct ERN for the employee. When you select the Correct History button from within this component, the Existing Assignment Begin Date and Choose an Existing Assignment fields display on the Assignment page.

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

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

These topics discuss managing employee assignment data.

Pages Used to Manage Employee Assignment Data

Page Name	Definition Name	Usage
<u>Assignment Data Page</u>	ASSIGNMENT_DATA	Enter and view information about assignment types.
<u>Assignment Home/Host Page</u>	ASSIGNMENT_HOMHST	View home and host information.
<u>Residence Home Page</u>	RESIDENCE_HOME	Enter information about home residences and furniture.
<u>Residence Host Page</u>	RESIDENCE_HOST	Enter information about host residences and furniture.
<u>Vehicle Data Page</u>	VEHICLE_DATA	Track the location and status of vehicles.
"Person Organizational Summary Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)	PERSON_SUMMARY	Review a summary of a person's organizational relationships.
Review Assignment Summary Page	ASSGNMT_SUMMARY	Review a summary of an employee's assignment.
Employee on Assignment Report Page	RUNCTL_PER717	Run the Employees on Assignment report (PER717), which lists the employees who are on assignment.

Assignment Data Page

Use the Assignment Data page (ASSIGNMENT_DATA) to enter and view information about assignment types.

Navigation

Workforce Administration > Global Assignments > Track Assignment > Assignment Data > Assignment Data

Image: Assignment Data page

This example illustrates the fields and controls on the Assignment Data page. You can find definitions for the fields and controls later on this page.

The screenshot shows a web application interface for 'Assignment Data'. At the top, there are navigation tabs: 'Assignment Data', 'Assignment Home/Host', 'Residence Home', 'Residence Host', and 'Vehicle Data'. Below the tabs, the user's name 'Yves Chabot' and 'Person ID KF0018' are displayed. The main content area is titled 'Assignment Data' and includes a search bar with 'Find | View All' and pagination 'First 1 of 1 Last'. The form contains several input fields: '*Begin Date' (11/01/1989), '*End Date' (09/16/1993), '*Assignment Type' (FLA) with a dropdown arrow and the text 'Foreign Loan Assignment', 'Departure Date', and 'Arrival Date'. Below these are sections for 'Home Domicile' (Country, State, City) and 'Host Contact Information' (Contact). A 'Comments' section is also visible at the bottom right.

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.

Assignment Home/Host Page

Use the Assignment Home/Host page (ASSIGNMENT_HOMHST) to view home and host information.

Navigation

Workforce Administration > Global Assignments > Track Assignment > Assignment Data > Assignment Home/Host

Image: Assignment Home/Host page

This example illustrates the fields and controls on the Assignment Home/Host page. You can find definitions for the fields and controls later on this 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				
<input checked="" type="radio"/> Assignment Begin Date		<input type="radio"/> Assignment End Date		<input type="radio"/> Current Date
Home Instance				
Empl Record	0	HR Status	Active	Last Start 06/12/1983
Company	KF1	Business Unit	France Business Unit	End Date
Business Unit	FRA01	Department	Operations- Paris	
Department	13000	Job Code	Sales Manager	
Job Code	790000	Position Number		
Location Code	KFPA01	Paris	Country France	Currency FRF
Supervisor Level				
Host Data				
Find View All First 1 of 1 Last				
Empl Record	1	HR Status	Active	Last Start 11/01/1989
Company	KG1	Business Unit	BIUK	End Date
Business Unit	GBR02	Department	Sales and Marketing - UK	
Department	21300	Job Code	Sales and Marketing - Scotland	
Job Code	770045	Position Number	Representative-Sales	
Location Code	KG02	Edinburgh - Scotland	Country United Kingdom	Currency GBP
Supervisor Level				

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.

Residence Home Page

Use the Residence Home page (RESIDENCE_HOME) to enter information about home residences and furniture.

Navigation

Workforce Administration > Global Assignments > Track Assignment > Assignment Data > Residence Home

Image: Residence Home page

This example illustrates the fields and controls on the Residence Home page. You can find definitions for the fields and controls later on this page.

The screenshot shows a web application interface for managing residence information. At the top, there are tabs for 'Assignment Data', 'Assignment Home/Host', 'Residence Home' (selected), 'Residence Host', and 'Vehicle Data'. Below the tabs, the 'Residence Home' section displays 'Begin Date' (11/01/1989) and 'End Date' (09/16/1993), with a 'Type' of 'Foreign'. The 'Home Residence' section shows 'Yves Chabot' as the person, with a 'Person ID' of 'KF0018' and a '*Residence Number' of '1'. The 'Home Residence Detail' section includes an '*Effective Date' of '11/06/1989', '*Status Before Assignment' set to 'Rent', '*Status During Assignment' set to 'N/A', and '*Home Furniture' set to 'N/A'. There is also a checkbox for 'Property Management' and a 'Comment' field.

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.

Residence Host Page

Use the Residence Host page (RESIDENCE_HOST) to enter information about host residences and furniture.

Navigation

Workforce Administration > Global Assignments > Track Assignment > Assignment Data > Residence Host

Image: Residence Host page

This example illustrates the fields and controls on the Residence Host page. You can find definitions for the fields and controls later on this 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.

Related Links

"Understanding Job Data" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)

Vehicle Data Page

Use the Vehicle Data page (VEHICLE_DATA) to track the location and status of vehicles.

Note: PeopleSoft HR also includes Administer Company Cars to track an organization's car-specific benefits.

Navigation

Workforce Administration > Global Assignments > Track Assignment > Assignment Data > Vehicle Data

Image: Vehicle Data page

This example illustrates the fields and controls on the Vehicle Data page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Vehicle Data' page for 'Yves Chabot' (Person ID KF0018). The page is divided into several sections:

- Vehicle Information:** Includes 'Begin Date' (11/01/1989), 'End Date' (09/16/1993), and 'Type' (Foreign). It has 'Find | View All' and 'First 1 of 1 Last' navigation.
- Home Vehicle:** Includes '*Vehicle Nbr' (1) and 'Description'. It has 'Find | View All' and 'First 1 of 1 Last' navigation.
- Comments On Vehicle:** Includes '*Effective Date' (01/02/2014), '*Reason' (dropdown), and a 'Comment' field. It has 'Find | View All' and 'First 1 of 1 Last' navigation.
- Host Vehicle:** Includes '*Vehicle Nbr' (1) and 'Description'. It has 'Find | View All' and 'First 1 of 1 Last' navigation.
- Vehicle Information (under Host Vehicle):** Includes '*Effective Date' (01/02/2014), '*Reason' (dropdown), '*Vehicle Status' (dropdown), 'Date Available' (calendar), a 'Cash In Lieu' checkbox, and a 'Comment' field. It has 'Find | View All' and 'First 1 of 1 Last' navigation.

Home Vehicle

Vehicle Nbr (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 Nbr (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.

Related Links

"Allocating Company Cars" (PeopleSoft HCM 9.2: Administer Company Cars)

Managing Company-Paid Travel for Employees on Assignment

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

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Company Paid Travel Page	TRAVEL_CMPNY_PAID	Enter company-paid travel information.
Dependent Company Paid Travel Page	TRAVEL_CMPNY_DEP	Track travel for which dependents of employees are eligible.

Company Paid Travel Page

Use the Company Paid Travel page (TRAVEL_CMPNY_PAID) to enter company-paid travel information.

Navigation

Workforce Administration > Global Assignments > Track Assignment > Company Paid Travel > Company Paid Travel

Image: Company Paid Travel page

This example illustrates the fields and controls on the Company Paid Travel page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Company Paid Travel' page for employee Florence Gautier (Person ID KF0025). The page is divided into several sections:

- Company Paid Travel Details:**
 - *Date Eligible: 01/02/2014
 - Assignment Type: Foreign
 - *Type of Travel: (empty)
 - Amount/Currency: (empty) USD
 - Date Taken: (empty)
 - Begin Date: 11/01/1983
 - End Date: 12/31/1987
 - *Mode of Travel: Air
 - Cash In Lieu
 - Alternate Location
- From:**
 - Country: FRA (France)
 - Department: 75 (Paris)
 - City: Paris
- To:**
 - Country: (empty)
 - State: (empty)
 - City: (empty)
- Accompanying Dependent:**

*Dependent	Name	Relation	Birthdate	Marital Status
(empty)				

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. *Air* 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 - HCM 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 theTo group box.

Country, State, City

Enter the name of the country from which the employee is traveling.

The system supplies the From values from Host Assignment Data by default. These values can be overwritten. The system supplies the To values from Home Data by default. When the travel type is *Rest and Recreation* or *Business Travel*, the To default values can be overwritten.

If you change the country code in either the From orTo group box, the system clears theState andCity 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 theInsert Row button.

Birthdate

Displays the dependent's date of birth.

Managing Dependent Information for Employees on Assignment

These topics discuss managing dependent information for employees on assignment.

Pages Used to Manage Dependent Information for Employees on Assignment

Page Name	Definition Name	Usage
<u>Dependent Accompanying Page</u>	FAMILY_AT_HOST	Enter family and dependent information.
<u>Review Immediate Family Data Page</u>	IMMEDIATE_FAMILY	View information about an employee's immediate family.
<u>Dependent Data - Name Page</u>	DEPEND_BENEF1	Add or edit dependent and beneficiary names.
<u>Dependent Data - Address Page</u>	DEPEND_BENEF_ADDR	Add or edit dependent and beneficiary addresses.
<u>Dependent Data - Personal Profile Page</u>	DEPEND_BENEF2	Add or edit dependent and beneficiary personal information.

Entering Dependent Data

Enter and maintain dependent information on the Dependent Data (DEPEND_BENEF) component.

Navigation

Workforce Administration > Global Assignments > Track Assignment > Dependent Data

See "Tracking Dependent and Beneficiary Data" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).

Dependent Accompanying Page

Use the Dependent Accompanying page (FAMILY_AT_HOST) to enter family and dependent information.

Navigation

Workforce Administration > Global Assignments > Track Assignment > Dependent Accompanying > Dependent Accompanying

Image: Dependent Accompanying page

This example illustrates the fields and controls on the Dependent Accompanying page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Dependent Accompanying' page for Florence Gautier (Person ID KF0025). The page is divided into several sections:

- Family at Host:** This section contains a search bar, a 'Find | View All' link, and navigation controls (First, 1 of 1, Last). Below this are fields for '*Effective Date' (with a calendar icon), 'Assignment Type' (Foreign), 'Begin Date' (11/01/1983), and 'End Date' (12/31/1987). There are also '+' and '-' icons for expanding/collapsing the section.
- Family Size:** This section displays 'Immediate' (0) and 'Immediate at Host' (0). Below this, it shows 'Total at Host' (0).
- Dependents at Host:** This section has a 'Personalize | Find | View All' link and navigation controls. It contains a table with the following columns: '*Dependent ID', 'Name', 'Relation', 'Birthdate', 'Marital Status', 'At Host', and 'Occupation'. The table is currently empty, with a search icon and '+'/'-' icons at the bottom right.

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.

Deselect 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 non-family 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 non-family members who are accompanying the employee.

Adding Dependents to the Host Location

To add another dependent to the Dependent Accompanying 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 Dependent Accompanying 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.

Review Immediate Family Data Page

Use the Review Immediate Family Data page (IMMEDIATE_FAMILY) to view information about an employee's immediate family.

Navigation

Workforce Administration > Global Assignments > Track Assignment > Review Immediate Family Data > Review Immediate Family Data

Image: Review Immediate Family Data page

This example illustrates the fields and controls on the Review Immediate Family Data page. You can find definitions for the fields and controls later on this page.

Review Immediate Family Data					
Ted Baer			Person ID KUL401		
Dependent / Beneficiary Data					
Dependent Name	Birthdate	Birthplace	Relation	Marital Status	Occupation
Thomas Baer	10/12/1981		Child	Single	
Benjamin Baer	10/12/1983		Child	Single	
Tamara Baer	01/06/1990		Child	Single	

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.

Dependent Data - Name Page

Use the Dependent Data - Name page (DEPEND_BENEF1) to enter or update information about a dependent's name.

Navigation

Workforce Administration >Global Assignment >Track Assignment >Dependent Data >Name

For information regarding this page, please see "Dependent Information - Name Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).

Dependent Data - Address Page

Use the Dependent Data - Address page (DEPEND_BENEF_ADDR) to enter or update information about a dependent's address.

Navigation

Workforce Administration >Global Assignment >Track Assignment >Dependent Data >Address

For information regarding this page, please see "Dependent Information - Address Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).

Dependent Data - Personal Profile Page

Use the Dependent Data - Personal Profile page (DEPEND_BENEF2) to add or edit dependent and beneficiary personal information.

Navigation

Workforce Administration > Global Assignment > Track Assignment > Dependent Data > Person Profile

For information regarding this page, please see "Dependent Information - Personal Profile Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).

Tracking Assignment Compensation and Currency Fluctuation

This topic discusses how to track assignment compensation.

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

Page Used to Track Assignment Compensation and Currency Fluctuation

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Assignment Compensation Page	ASSGNMT_EARNS_DED	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.

Related Links

"Understanding Currency" (PeopleSoft HCM 9.2: Application Fundamentals)

Assignment Compensation Page

Use the Assignment Compensation page (ASSGNMT_EARNS_DED) to 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.

Navigation

Workforce Administration > Global Assignments > Track Assignment > Assignment Compensation > Assignment Compensation

Image: Assignment Compensation page

This example illustrates the fields and controls on the Assignment Compensation page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Assignment Compensation' page for employee Florence Gautier (Empl ID KF0025). The page is divided into several sections:

- Assignment Compensation:** Includes fields for *Effective Date (11/01/1983), *Amount Frequency (Annual), Assignment Type (Foreign), Begin Date (11/01/1983), End Date (12/31/1987), and Home/Emp Net Amount (35387.00).
- Home / Host:** Includes fields for *Home or Host (0), *From Currency Code (FRF), *To Currency Code (FRF), *Exchange Rate (1.00000000), and *Rate Type (OFFIC). Home/Host Net Amount is 35387.00.
- Earnings:** Shows a table with columns for *Code (AWA), Home Amount, and Host Amount. The Home Amount is 35387.00.
- Deductions:** Shows a table with columns for *Code, Home Amount, and Host Amount.

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

Managing International Schools and Programs Allowances

This topic discusses how to manage educational data.

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 HR helps determine any educational assistance to which employees are entitled and tracks multiple institutions.

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

Pages Used to Manage Educational Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>International School/Program Page</u>	INTL_SCHOOL_PROGRM	Enter payment information.
Dependent International School Page	INTL_SCHOOL_DEP	Track beginning and end dates. Set up payment schedules for reimbursement in the designated currency.

International School/Program Page

Use the International School/Program page (INTL_SCHOOL_PROGRM) to enter payment information.

Navigation

Workforce Administration > Global Assignments > Educational Allowances > International School/Program > International School/Program

Image: International School/Program page

This example illustrates the fields and controls on the International School/Program page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'International School/Program' page for user Florence Gautier (Person ID KF0025). The main section, 'International School Program Details', includes fields for:

- *School/Program Code: K00001 (La Sorbonne)
- Internal/External: E
- School/Program Type: Other
- Begin Date: []
- End Date: []
- Amount: \$0.00
- *Currency: USD
- Payment Frequency: []
- Total Scheduled Amt: 0.00

 Below this is a 'Payment Schedule' table with the following data:

Due Date	Total Amt	Employer Amt	Employee Amt	Paid	*Reimbursement Status
[]	\$0.00	\$0.00	\$0.00	<input type="checkbox"/>	Not Reimbursed

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 and Currency 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 - HCM 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.
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 <i>Not Reimbursed</i> to <i>Reimbursed</i> . If the amount that the employee paid can't be reimbursed, select <i>Unreimbursable</i> .

