PeopleSoft HCM 9.2: PeopleSoft Human Resources Administer Training

October 2025

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at https://docs.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit https://docs.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit https://docs.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Contents

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 PeopleSoft Online Help

If you're setting up an on-premises 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. Installable PeopleSoft Online Help is made available with selected PeopleSoft Update Images and with PeopleTools releases for on-premises installations, through the Oracle Software Delivery Cloud.

Your installation documentation includes a chapter with instructions for how to install the online help for your business environment, and the documentation zip file may contain a README.txt file with additional installation instructions. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help."

To configure the context-sensitive help for your PeopleSoft applications to use a locally installed online help website, 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.

Typographical Convention	*Description*
⇒	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 Related Links

Oracle Help Center

PeopleSoft Online Help Home

PeopleSoft Information Portal

My Oracle Support

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

PeopleSoft Business Process Maps (Microsoft Visio format)

HCM Abbreviations

PeopleSoft Spotlight Series

Contact Us

Send your suggestions to psoft-infodev_us@oracle.com.

Please include the applications update image or PeopleTools release that you’re using.

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Chapter 1

Getting Started with Administer Training

Administer Training Overview

Administer Training supports your company's training needs.

With this application, you can:

- Establish the company training architecture.
- Manually enroll employees into the training program.
- Track course information for all students, including employees, temporary workers, and customers.
- Track the demand for training in an at the department or employee level.

Administer Training Business Processes

Administer Training supports the following business processes:

- Setting up training programs and courses.

  You set up courses to create course sessions. After you set up courses, you can group the courses in categories and subcategories to further help administer and plan training.

- (Optional) Setting up training costs.

  After you set up the training tables for vendors, instructors, training facilities, and equipment and define course codes and training programs, you can set up training costs.

- (Optional) Setting up training requirements.

  You identify training demands on three levels: general, departmental, and employee.

- (Optional) Planning training budgets and run scenarios.

  You can use budgetary scenarios (budgetary plans) to help plan budgets, approve demands, and track and freeze budgets. You can define as many scenarios as you need for different budgetary training plans.

- Administering course sessions.

  Course sessions can be divided into cut sessions. Each cut session has its own start date, end date, location, and instructor.

- Enrolling or wait listing students.

You can set up different methods of enrolling students and set up waiting lists when sessions are full. For all enrollment options, you can generate letters to notify students when you enroll them in a course, reschedule a course, or cancel a course session.

- Tracking student training.

  You can track requirements and achieve career objectives. You can track on- and off-site training courses for both employees and nonemployees (such as contractors or temporary workers).

- (Optional) Tracking student training costs.

  You can handle student reimbursements for external course expenses. The system calculates reimbursable amounts according to schedules that you create. You run processes that update the organization's training costs as students complete courses and are reimbursed for training expenses. Costs are posted against the training budget.

We cover these business processes in the business process topics in this documentation.

Administer Training Integrations

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

PeopleSoft HR shared tables are available to many PeopleSoft HCM applications. In addition, data in many PeopleSoft HCM tables is available to any PeopleSoft application that is set up to subscribe to the published messages.

We cover integration considerations in this documentation.

Supplemental information about third-party application integration is located on the My Oracle Support website.

Administer Training 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 product documentation.

Other Sources of Information

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

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.

For more information on PeopleSoft Setup Manager, see the product documentation for *PeopleTools: Setup Manager*.

Chapter 2

Defining Training Courses and Programs

Understanding Course and Program Setup

These topics list prerequisites and discuss:

- Training courses
- Training programs

Training Courses

Courses are the foundation of in-house course session administration. To set up courses:

1. Define training resources.

   Enter information about the vendors, instructors, training facilities, equipment, and materials that are needed for course delivery.

2. Define course categories and subcategories.

   Categories and subcategories help organize courses by topic so that users can find them easily in the training catalog.

3. Define courses.

   For each course, define general information, such as the duration, primary delivery method, and whether the course is internal or external. Also identify course prerequisites, instructor competencies and target competencies for the course (if you're using the Manage Profiles business process), equipment and materials, and the course category and subcategory.

4. Organize the course catalog, as needed.

Training Programs

After you define courses, you can create training programs. You specify the courses within the program, the sequence in which the courses are to be taken, and which are required.

Prerequisites

When you set up training courses, you can specify competencies, accomplishments, education, and skills that are required to teach a course or that are assigned to students after successful completion of the course. To do this, you need to set up your content catalog provided in the HR: Manage Profiles business process.

Related Links

"Understanding the Content Catalog" (PeopleSoft Human Resources Manage Profiles)

"Understanding Profile Management" (PeopleSoft Human Resources Manage Profiles)

Setting Up Vendors and Vendor Contacts

To set up vendors and vendor contacts, use the Vendors (TRN_VENDOR_TABLE1) and the Vendor Contacts (TRN_VNDR_CNTCT_TB1) components.

You'll probably outsource some of the services that you use to run training course sessions. For example, you might use caterers to provide meals for attendees or hotel conference rooms to hold some courses. In the Vendors component, you enter information about the vendors that you use frequently.

Note: (FRA) Use the Vendors component to set up finance fund providers for 2483 reporting in France.

Pages Used to Set Up Vendors and Vendor Contacts

Page Name	***Definition Name***	***Usage***
Vendor Profile Page	TRN_VENDR1_TBL_GBL	Enter basic information about a vendor.
Vendors - Address Page	TRN_VENDR2_TBL_GBL	Enter the vendor's address and the default cost charged by the vendor.
Vendor Contact Phone Page	TRN_VNDR_CNTCT_TB1	Enter the details of a vendor contact.
Vendor Contact Address Page	TRN_VNDR_CNTCT_TB2	Enter the address of a vendor contact.

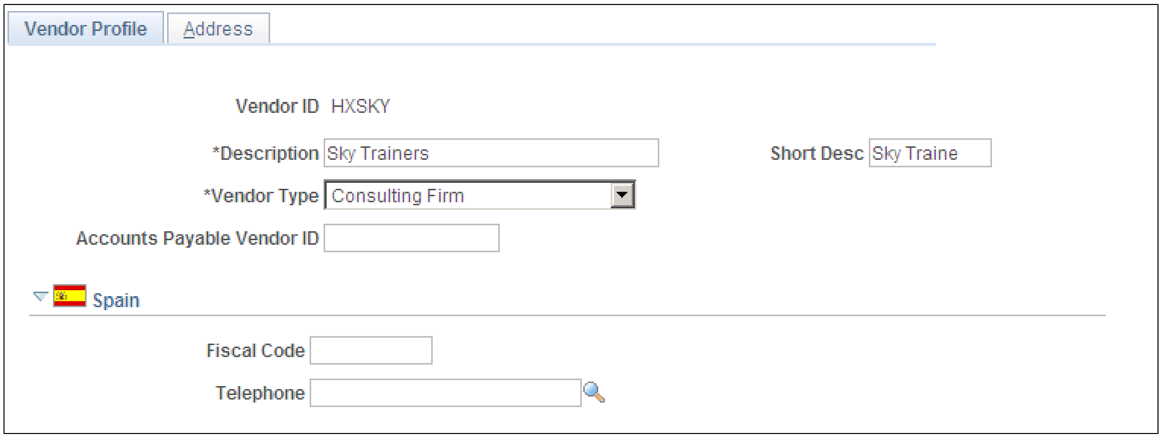
Vendor Profile Page

Use the Vendor Profile page (TRN_VENDR1_TBL_GBL) to enter basic information about a vendor.

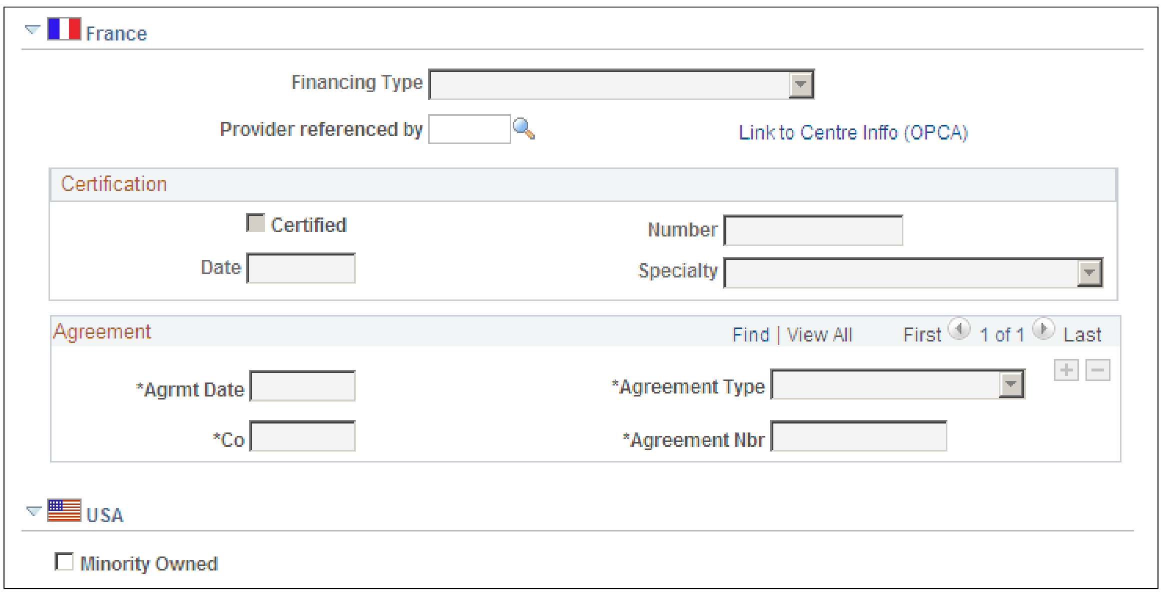
Navigation:

Administer Training > **Define Training Resources** > **Vendors** > **Vendor Profile**

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



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



Field or Control	***Description***
Vendor Type	Select the type of services provided by the vendor: *Consulting Firm, Equipment Rental, Facilities Rentals, Financing Fund, Guest Speaker, Other, Outside Instructors, Training Materials,* or *Training Provider.* **Note:** (FRA) The *Consulting Firm, Training Provider,* and *Financing Fund* values activate the France section of the page. Select *Consulting Firm* to designate that the vendor provides competency checks. Select *Training Provider* to designate that the vendor delivers training. Select *Financing Fund* when the vendor represents a financing organization to which you contribute funds for training.

(FRA) France

This section is activated only when the selected vendor type is *Consulting Firm, Training Provider,* or *Financing Fund.*

Field or Control	***Description***
Financing Type	When the vendor type is *Financing Fund,* identify the type of fund the vendor finances: Select *Financing Training Leave Fund* if the fund pertains to individual training leave *(Congé Individuel de Formation* or CIF). Select *Financing Fund* if the fund is not used for individual training leave. Your selection determines the section (Group L, indicator 5 or Group L, indicator 11) of the 2483 report, under which training funded by this vendor are reported.
Provider Referenced By	This field is available only when the vendor type is *Consulting Firm* or *Training Provider.* Select the organization that provides funding for competency checks. Funding organizations are delivered as system data in the Vendor table (PS_TRN_VENDOR_TBL).
Link to Centre Inffo (OPCA)	Click this link to access the website that lists the names and addresses of the fund collecting organizations (Organismes paritaires collecteurs agréés (OPCA).

(FRA) Certification

If the vendor type is *Training Provider,* enter the provider's certification details in this group box

Field or Control	***Description***
Certified, Number, and **Date**	Select if the government certifies the provider, and enter the certification number and date.
Specialty	Select the provider's area of expertise.

(FRA) Agreement

For each training provider, record all agreements that have been reached with your organization. This information is needed to meet French legal reporting requirements. Add a row for each agreement.

Field or Control	Description
Agrmt Date (agreement date)	Enter the date of the agreement between your organization and the training provider.
Agreement Type	Select the type of agreement: *Simple, Annual,* or *Multi-ann* (multiannual).
Co (company)	Select the provider name from the vendors that you defined in the Vendor table.
Agreement Nbr (agreement number)	Enter the number of the agreement between your organization and the training provider.

(USA) USA

Field or Control	Description
Minority Owned	Select if a member of an ethnic minority owns the vendor's business.

Related Links

Understanding the French Training Report 2483 Process

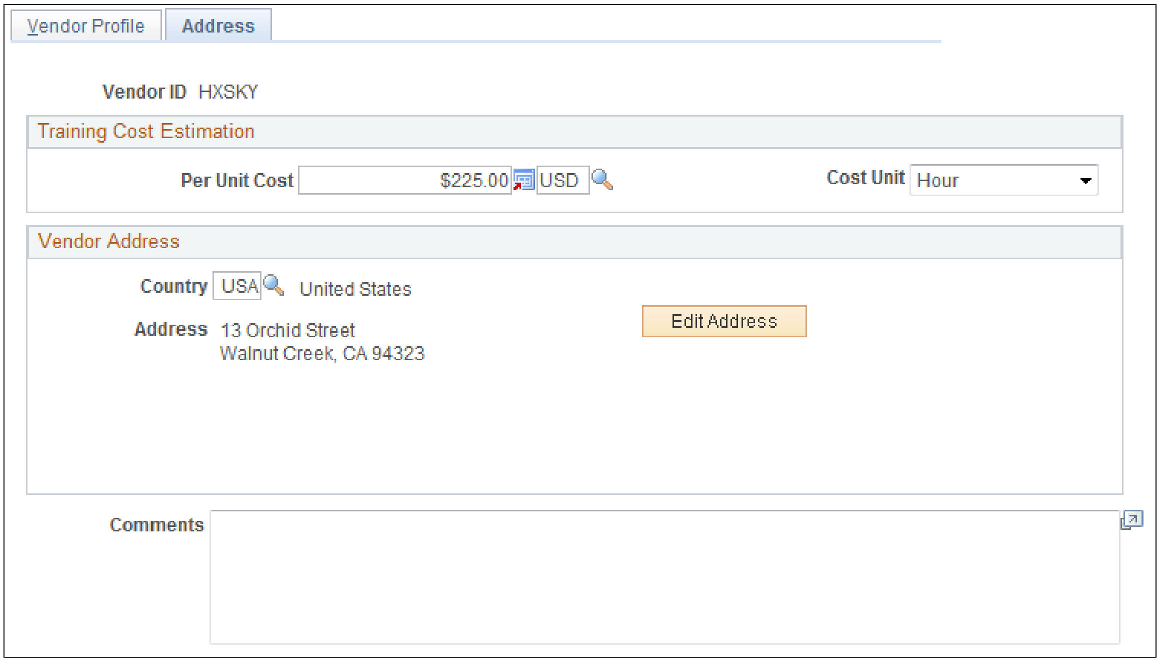
Vendors - Address Page

Use the Vendors - Address page (TRN_VENDR2_TBL_GBL) to enter the vendor's address and the default cost charged by the vendor.

Navigation:

Administer Training > **Define Training Resources** > **Vendors** > **Address**

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



Training Cost Estimation

Field or Control	***Description***
Per Unit Cost	Enter the vendor cost and update the currency in the currency field if necessary. The system uses this value as a default vendor cost when you define course costs.
Cost Unit	Select the unit for the vendor cost.

Related Links

Understanding Training Cost Tracking
"Understanding Country Codes" (Application Fundamentals)

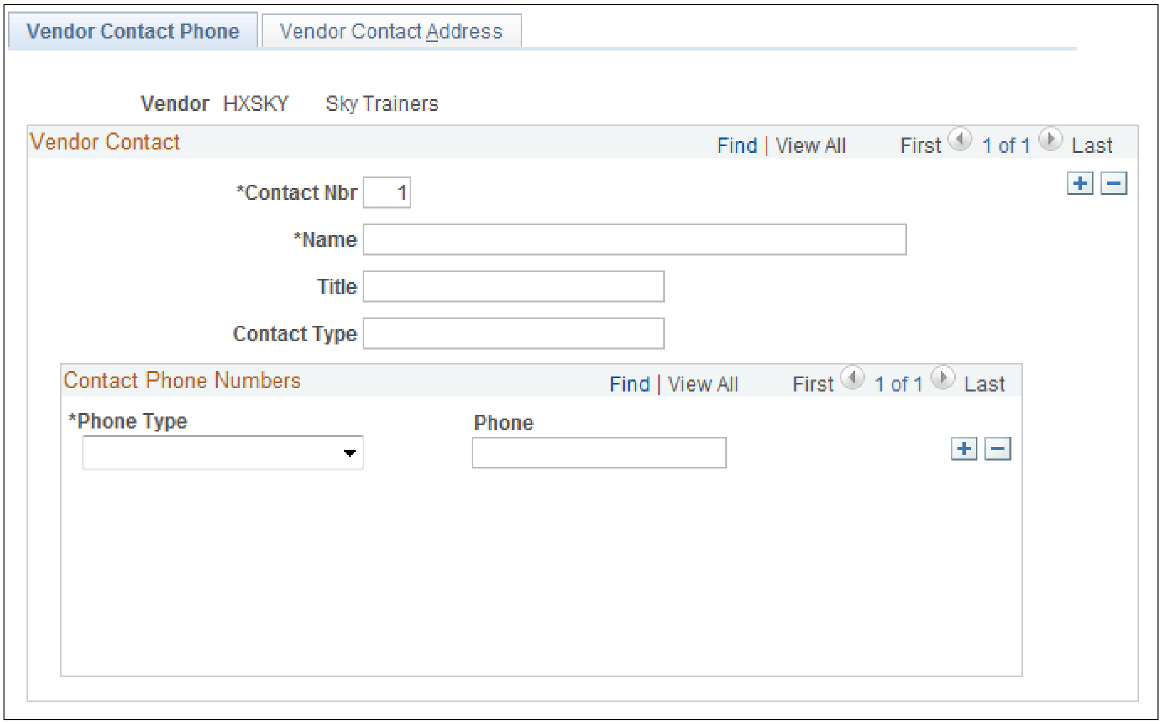
Vendor Contact Phone Page

Use the Vendor Contact Phone page (TRN_VNDR_CNTCT_TB1) to enter the details of a vendor contact.

Navigation:

Administer Training > **Define Training Resources** > **Vendor Contacts** > **Vendor Contact Phone**

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



Vendor Contact

Field or Control	***Description***
Contact Nbr (contact number)	The system assigns a sequential number to each contact that you add. You can renumber contacts.

Contact Phone Numbers

Add a row for each phone number, such as a business telephone number, fax number, or cellular phone number.

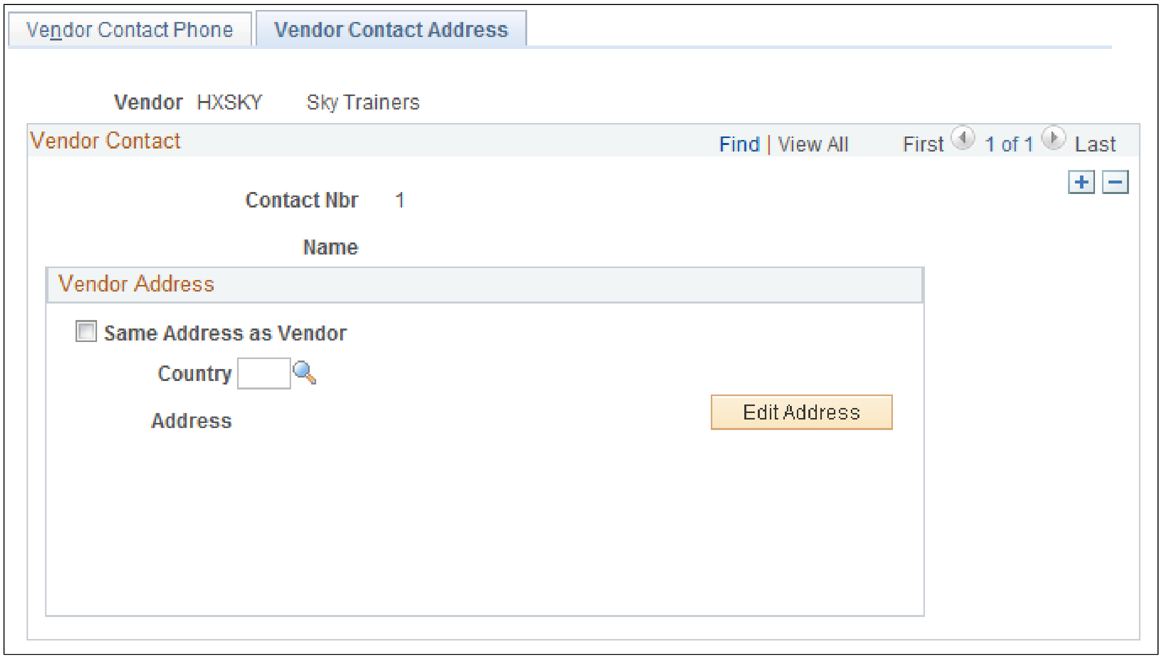
Vendor Contact Address Page

Use the Vendor Contact Address page (TRN_VNDR_CNTCT_TB2) to enter the address of a vendor contact.

Navigation:

Administer Training > **Define Training Resources** > **Vendor Contacts** > **Vendor Contact Address**

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



Field or Control	*Description*
Same Address as Vendor	Select if the contact's address is the same as the vendor address that you entered on the Address page. The system displays the vendor address and makes the address fields unavailable. When you change the vendor address on the Address page, the system updates the business address on this page for each contact for which this check box is selected.

Setting Up Training Equipment, Materials, and Facilities

To set up training equipment, materials, and facilities, use the Equipment and Materials (TRN_EQUIP_TABLE) and the Training Facilities (TRN_FACILITY_TBL) components.

Pages Used to Set Up Training Equipment, Materials, and Facilities

Page Name	*Definition Name*	*Usage*
Equipment and Materials Page	TRN_EQUIP_TABLE	Identify equipment and materials used for in-house training courses. To ensure that equipment is available where the courses take place, you associate equipment and materials with specific training facilities.

Page Name	***Definition Name***	***Usage***
Training Facilities - Address Page	TRN_FACILITY_TBL1	Record the address of each training facility that your organization uses.
Contacts and Equipment Page	TRN_FACILITY_TBL2	Enter the contact name and telephone number for the training facility and list the available equipment.
Training Facilities - Training Rooms Page	TRN_FACILITY_TBL4	Track information about each training room at a facility: location, capacity, cost, and the fixed equipment that is available in the room.
Training Facilities - Directions Page	TRN_FACILITY_TBL3	Enter directions to a training facility.

Equipment and Materials Page

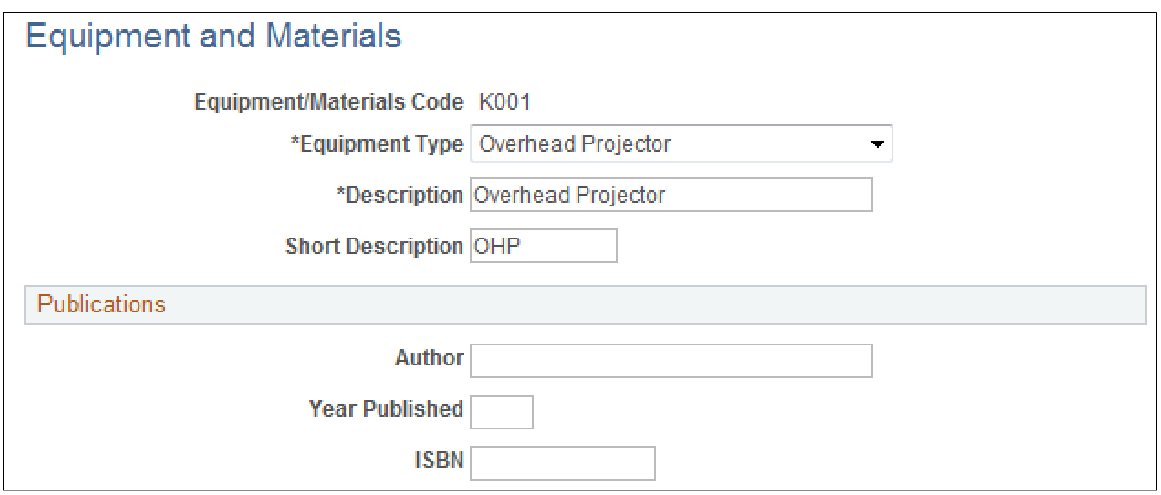
Use the Equipment and Materials page (TRN_EQUIP_TABLE) to identify equipment and materials used for in-house training courses.

To ensure that equipment is available where the courses take place, you associate equipment and materials with specific training facilities.

Navigation:

Administer Training > **Define Training Resources** > **Equipment and Materials** > **Equipment and Materials**

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



Field or Control	***Description***
Equipment Type	Select from the available options.

Publications

Field or Control	***Description***
Author, Year Published, and **ISBN**	Enter bibliographic information in these fields.

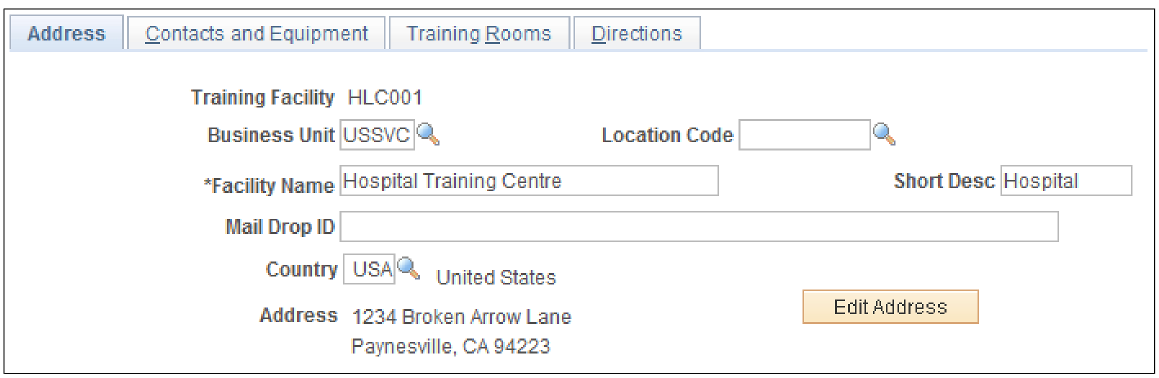
Training Facilities - Address Page

Use the Training Facilities - Address page (TRN_FACILITY_TBL1) to record the address of each training facility that your organization uses.

Navigation:

Administer Training > **Define Training Resources** > **Training Facilities** > **Address**

This example illustrates the fields and controls on the Training Facilities - Address page. You can find definitions for the fields and controls later on this page.



Training facilities can be on company premises or offsite at an external vendor's facility.

Field or Control	***Description***
Business Unit	Select the business unit that is linked to the training facility.

Field or Control	*Description*
Location Code	If the training facility is on company premises, select a location code. You can select only location codes that are assigned to the business unit that you selected. If you change the business unit after entering a location code, and the location code isn't tied to this business unit, the system displays a warning message and clears this field. If the training facility is offsite, leave this field blank.
Facility Name	If you didn't enter a location code, enter the facility's name and address. If you entered a location code, the system completes this field and makes it unavailable.
Mail Drop ID	Enter a mail drop identifier, if there is a designated collection point for mail that is addressed to the training facility. **Note:** The mail drop isn't part of the normal address and isn't included in the standard training letters that are supplied by PeopleSoft.
Country	If you entered a location code, the system completes this field. If you didn't enter a location code, select a country. When you move out of the field, the system generates the address format for that country, as specified on the Country Table - Address Format page.

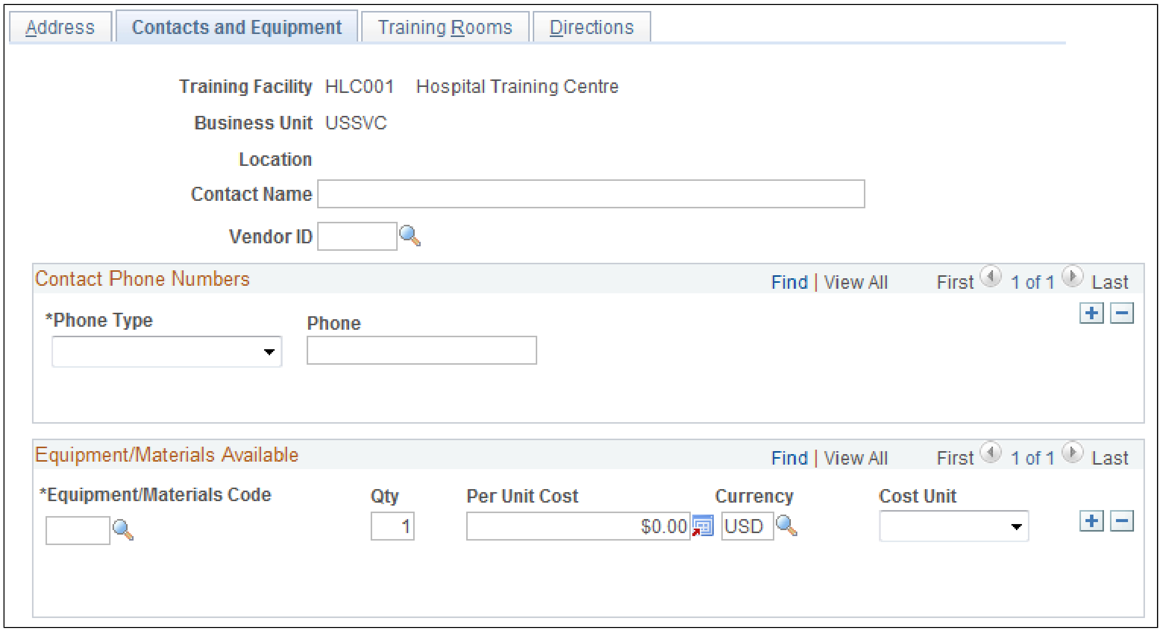
Contacts and Equipment Page

Use the Contacts and Equipment page (TRN_FACILITY_TBL2) to enter the contact name and telephone number for the training facility and list the available equipment.

Navigation:

Administer Training > **Define Training Resources** > **Training Facilities** > **Contacts and Equipment**

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



Note: You need to fill out this page if you use training budgets.

Field or Control	***Description***
Contact Name	Enter a contact name for the training facility. This field is required to generate the Equipment Checklist report (TRN034).
Vendor ID	If the contact works for a vendor, select the vendor ID.

Contact Phone Numbers

Field or Control	***Description***
Phone Type and **Phone**	Select a phone type and enter the number. These fields are required to generate the Equipment Checklist report (TRN034).

Equipment/Materials Available

List all equipment that is shared between training rooms. Don't include fixed equipment that is tied to a particular room.

Field or Control	***Description***
Equipment/Materials Code	The system displays the name of the selected equipment.
Qty (quantity)	Enter the quantity of each piece of equipment that is available at the training facility.
Per Unit Cost	Enter a per unit cost for each item. This field is optional, but it's helpful as a reference, especially for comparing facility site costs. In the field next to per unit cost, select the currency code for the item. The default currency code is from the value that is specified in the EXCHNG_TO_CURRENCY field in the BUS_UNIT_OPT_HR record. You can override this value.
Cost Unit	Select a cost unit that is associated with the item.

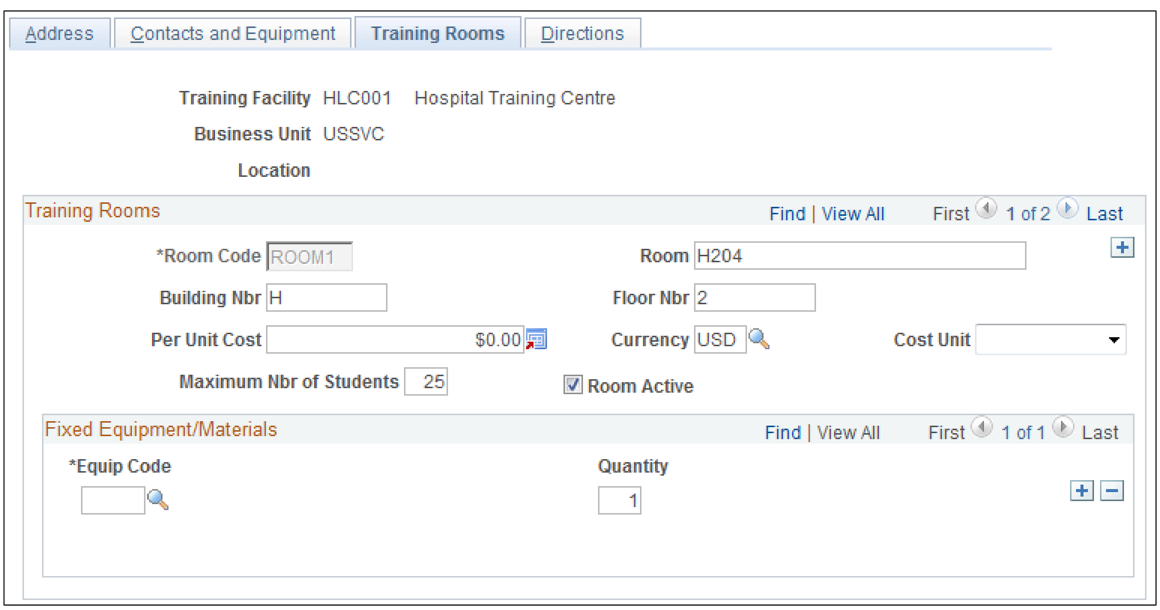
Training Facilities - Training Rooms Page

Use the Training Facilities - Training Rooms page (TRN_FACILITY_TBL4) to track information about each training room at a facility: location, capacity, cost, and the fixed equipment that is available in the room.

Navigation:

Administer Training > **Define Training Resources** > **Training Facilities** > **Training Rooms**

This example illustrates the fields and controls on the Training Facilities - Training Rooms page. You can find definitions for the fields and controls later on this page.



Note: You only need to fill out this page if you use training budgets.

Training Rooms

Field or Control	*Description*
Room Code	Each room in a training facility must have a unique room code.
Building Nbr and **Floor Nbr** (building number and floor number)	Enter the room name, the name or number of the building in which the room is located, and the floor number.
Per Unit Cost	Enter a per unit cost for the room.
Cost Unit	Select the cost unit that is associated with the per unit cost.
Maximum Nbr of Students (maximum number of students)	Enter the maximum number of students that can be accommodated in the room. When you set up a course session, the system checks this field to determine whether the room is large enough for the selected course.
Room Active	Deselect this check box if the training room isn't available for training. You can schedule sessions in a room only if **Room Active** is selected.

Fixed Equipment/Materials

Field or Control	*Description*
Equip Code and **Quantity** (equipment code and quantity)	Select a code for each item in the training room and the number of each item. Include only fixed equipment that is tied to the room. The system displays the item's name.

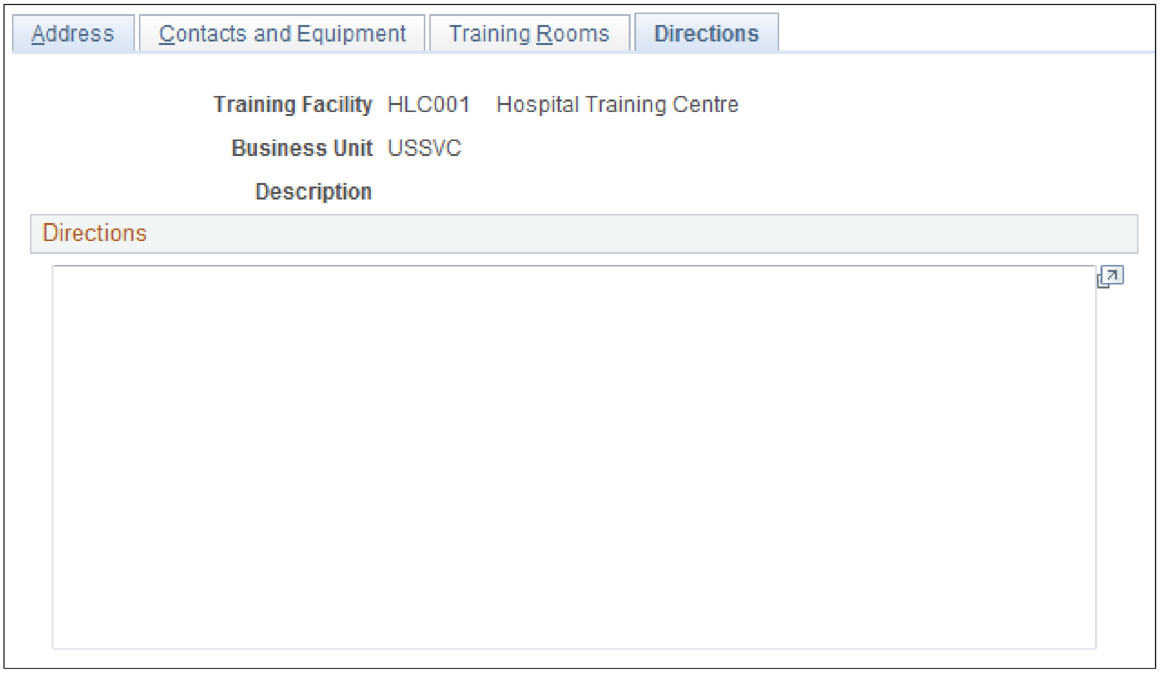
Training Facilities - Directions Page

Use the Training Facilities - Directions page (TRN_FACILITY_TBL3) to enter directions to a training facility.

Navigation:

Administer Training > **Define Training Resources** > **Training Facilities** > **Directions**

This example illustrates the fields and controls on the Training Facilities - Directions page. You can find definitions for the fields and controls later on this page.



You can use the directions that you enter here in the confirmation form letters that you send to students.

Related Links

Understanding How to Produce Training Letters

Setting Up Instructors

To set up profiles for internal and external instructors, use the Instructors (TRN_INSTRUCTR_TBL1) component.

Instructor profiles help you track instructor costs and areas of expertise; and choose the most qualified instructor for a course.

Pages Used to Set Up Instructors

Page Name	***Definition Name***	***Usage***
Instructors - Instructor Profile Page	TRN_INSTRUCTR_TBL1	Add an instructor to the Instructor table.
Instructors - Qualification Page	TRN_INSTRUCTR_TBL2	Define the courses that an instructor is qualified to teach.

Page Name	***Definition Name***	***Usage***
Matching Competencies Page	TRN_MTCH_CMPS_SEC	View the instructor's competencies, along with the course requirements. This page helps you determine the instructor's suitability to teach the course.
Matching Accomplishments Page	TRN_MTCH_ACPS_SEC	View the instructor's accomplishments, along with the course requirements. This page helps you determine the instructor's suitability to teach the course.

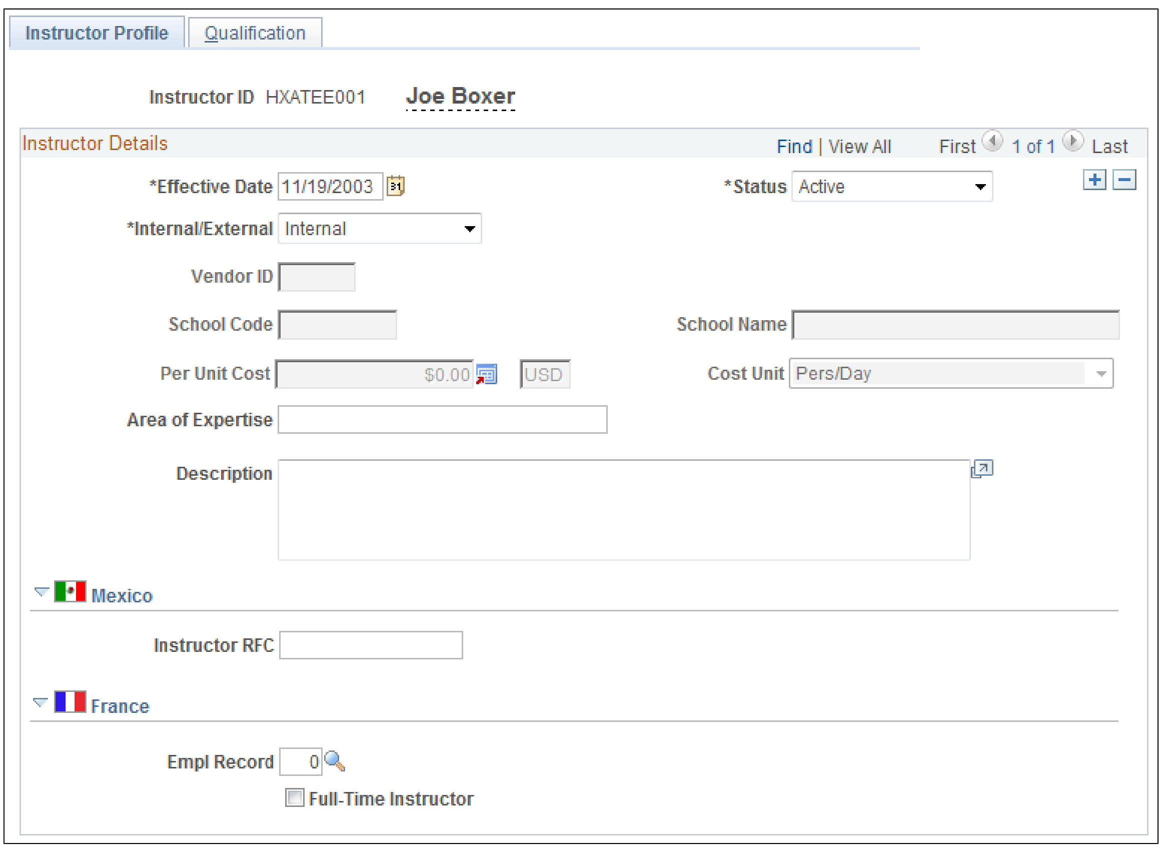
Instructors - Instructor Profile Page

Use the Instructors - Instructor Profile page (TRN_INSTRUCTR_TBL1) to add an instructor to the Instructor table.

Navigation:

Administer Training > **Define Training Resources** > **Instructors** > **Instructor Profile**

This example illustrates the fields and controls on the Instructors - Instructor Profile page. You can find definitions for the fields and controls later on this page.



An individual must have a person record in PeopleSoft HR in order to be added as an instructor.

See “(Classic) Adding a Person” (PeopleSoft Human Resources Administer Workforce).

Note: You only need to complete this page if you use training budgets.

Field or Control	***Description***
Internal/External	The system populates this field as follows: *Internal:* Instructor is an employee. *External:* Instructor is a nonemployee.
Vendor ID	Select a vendor ID if the instructor works for a vendor that you added through the Vendors component. If the instructor is internal, this field is unavailable.
School Code and **School Name**	If the instructor works at a school that you added to the School Table page, select a school code. The system displays the school name. To enter a school that isn't in the School table, leave the **School Code** field blank and enter a name in the School Name field. If the instructor is internal, these fields are unavailable.
Per Unit Cost	Enter the per unit cost for this instructor. This value is used as the default instructor cost in the course cost setup. If the instructor is internal, the cost for the instructor appears as the default from the Trainees Salary Costs page. See Trainees Salary Costs Page.
Cost Unit	Select a cost unit for the instructor's time.
Area of Expertise	Enter a brief description of the instructor's area of expertise.
Comments	Enter any further comments about the instructor's area of expertise. You don't need to specify the courses that the instructor teaches: these are added to the Instructors - Qualification page.

(MEX) Mexico

Field or Control	***Description***
Instructor RFC	Enter the RFC for the instructor.

(FRA) France

Field or Control	*Description*
Full-Time Instructor	Select if the instructor works full-time.

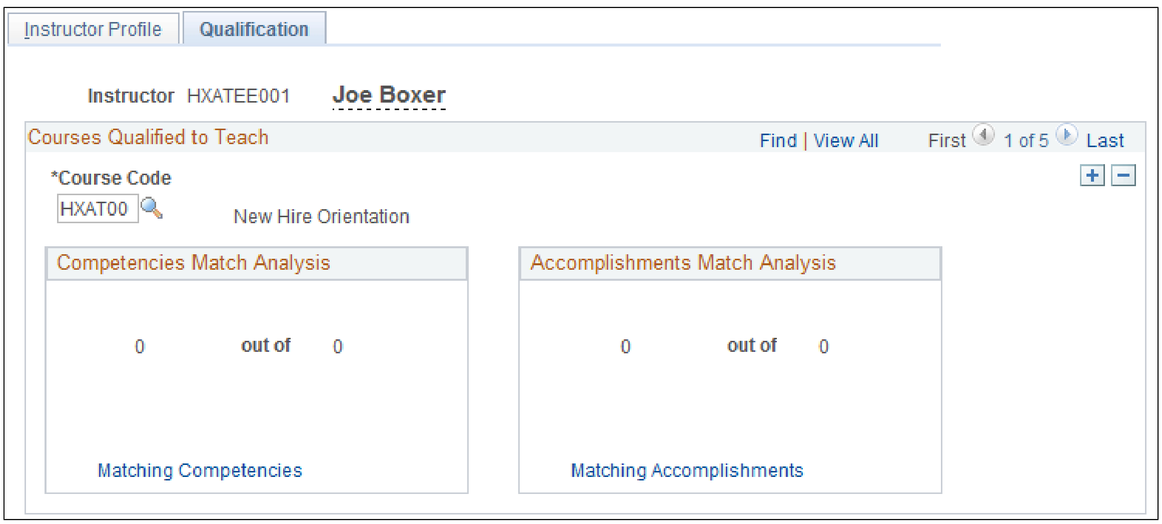
Instructors - Qualification Page

Use the Instructors - Qualification page (TRN_INSTRUCTR_TBL2) to define the courses that an instructor is qualified to teach.

Navigation:

Administer Training > **Define Training Resources** > **Instructors** > **Qualification**

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



Note: Complete this page after you define courses.

Courses Qualified to Teach

Field or Control	***Description***
Course Code	When you move out of this field, the system displays the course title and compares the course requirements with the instructor's competencies and accomplishments that are included in the instructor's profile. The results of this comparison appear in the **Competencies Match Analysis** and **Accomplishments Match Analysis** group boxes. If the instructor is qualified to teach the course, add the course to the instructor's profile.

Competencies Match Analysis

If you haven't set up course competency requirements, the system displays *0 out of 0*

Field or Control	***Description***
Matching Competencies	Click to access the Matching Competencies page and view required competencies alongside the instructor's competencies.

Accomplishments Match Analysis

If you haven't set up course accomplishments, the system displays *0 out of 0*.

Field or Control	***Description***
Matching Accomplishments	Click to access the Matching Accomplishments page and view required accomplishments alongside the instructor's accomplishments.

Matching Competencies Page

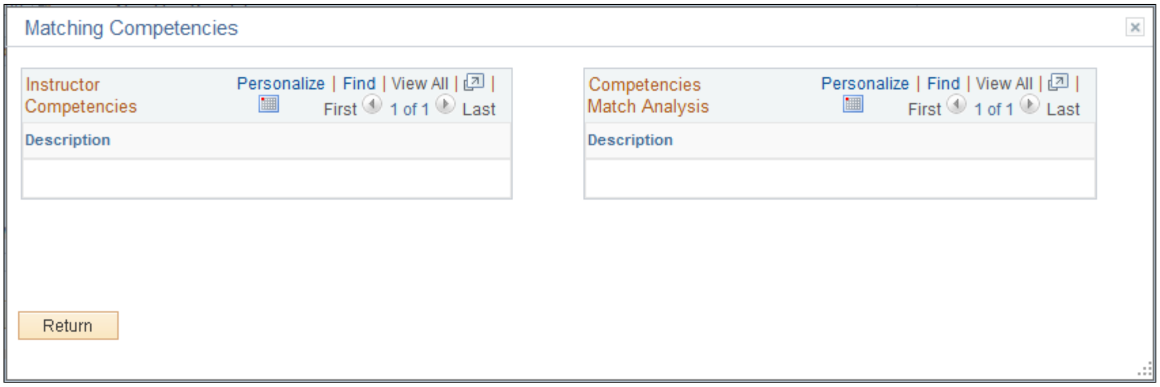
Use the Matching Competencies page (TRN_MTCH_CMPS_SEC) to view the instructor's competencies, along with the course requirements.

This page helps you determine the instructor's suitability to teach the course.

Navigation:

Click the **Matching Competencies** link on the Qualification page.

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



Instructor Competencies

This group box lists the competencies in the instructor's profile. The system compares the instructor's profile of type PERSON with the course requirements.

Competencies Match Analysis

This group box lists the competencies that are required to teach the course as defined on the Courses - Required Instr Comps/Accomps (courses - required instructor competencies and accomplishments) page. If the competency is included in the instructor's PERSON profile, the check box is selected.

Related Links

“Understanding Profile Management” (PeopleSoft Human Resources Manage Profiles)

Matching Accomplishments Page

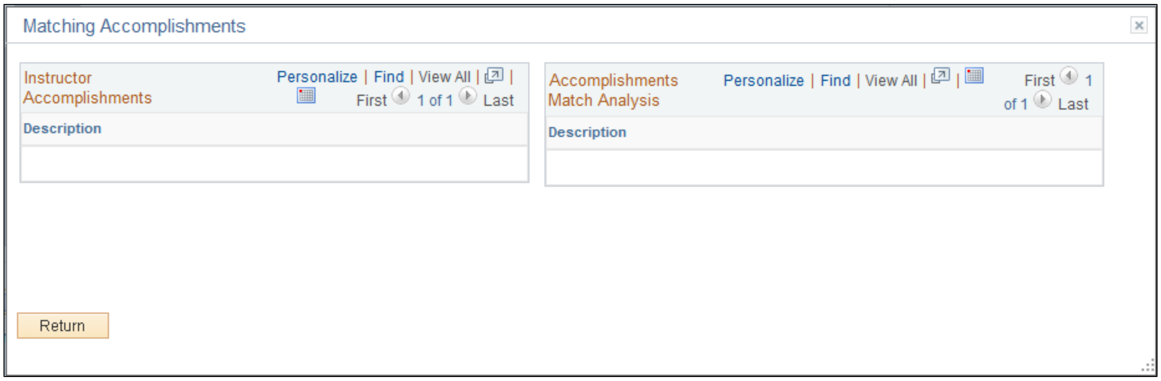
Use the Matching Accomplishments page (TRN_MTCH_ACPS_SEC) to view the instructor's accomplishments, along with the course requirements.

This page helps you determine the instructor's suitability to teach the course.

Navigation:

Click the **Matching Accomplishments** link on the Qualification page.

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



Instructor Accomplishments

This group box lists the accomplishments in the instructor's profile. The system compares the instructor's profile of type PERSON with the course requirements.

Accomplishments Match Analysis

This group box lists the accomplishments that are required to teach the course as defined on the Courses - Required Instr Comps/Accomps (courses required instructor competencies and accomplishments) page. If the accomplishment is included in the instructor's profile, the check box is selected.

Related Links

“Understanding Profile Management” (PeopleSoft Human Resources Manage Profiles)

Defining Course Categories

To set up course categories, use the Category/Subcategory (CATEGORY_TABLE) component.

You can classify each course by category and further by subcategory. This organizational structure can help employees find courses and determine training plans.

The following example shows how PeopleTools courses 1 and 2 have been classified as technical courses in the HR category. Likewise, the Supervisory Skills and Performance Reviews courses are classified as administrative courses in the same category. All courses have been added to the catalog.

Category	***Subcategory***	***Course Name***	***Catalog Status***
Human Resources	Technical	PeopleTools 1	Active
Human Resources	Technical	PeopleTools 2	Active
Human Resources	Administrative	Supervisory Skills	Active

Category	**Subcategory**	**Course Name**	**Catalog Status**
Human Resources	Administrative	Performance Reviews	Active

When you create a new category, the system uses the default subcategory code value *UNKNOWN.* Use the *UNKNOWN* subcategory to assign courses to a category that you don't want to divide into subcategories. This enables you to limit the catalog structure to a single category level. The Subcategory Code field value is display-only, but you can modify the description fields.

Note: Every category that you define has an *UNKNOWN* subcategory associated with it.

To make it easier to automatically populate values, the *UNKNOWN* subcategory is at the same level as the category. For example, on the Define Training Costs component, you can populate the table with any courses that are tagged with a category and subcategory value that you identify. This enables you to specify the costs that are associated with similar courses quickly, without having to enter them into the Define Training Costs component one at a time.

Page Used to Set Up Course Categories

Page Name	**Definition Name**	**Usage**
Category/Subcategory Page	TRN_CATEGORY_TABLE	Define the course categories that form the training catalog.

Category/Subcategory Page

Use the Category/Subcategory page (TRN_CATEGORY_TABLE) to define the course categories that form the training catalog.

Navigation:

Set Up HCM > **Product Related** > **Enterprise Learning** > **Category/Subcategory** > **Category/ Subcategory**

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

Description tab

Add a row for each subcategory that you want to add to the category.

Duration/Capacity tab

Enter the category duration time for the allocated course and the associated unit of time.

Enter the minimum and maximum number of students allowed in the course session.

Note: The system uses the **Duration Time, Unit, Min Students,** and **Max Students** field values as defaults when you define session costs.

Related Links

Organizing the Course Catalog

Setting Up Courses

These topics discuss how to use the Courses (COURSE_TABLE2) component.

Pages Used to Set Up Training Courses

Page Name	***Definition Name***	***Usage***
Courses - Course Profile Page	COURSE_TABLE1_GBL	Define general course information.

Page Name	Definition Name	Usage
Courses - Required Instr Comps/ Accomps Page	COURSE_TABLE6	Define competencies and accomplishments that instructors need to teach the course. When you add an instructor using the Instructors component, you can compare the instructor's profile with the course requirements before you add the course to the instructor's list.
Courses - Prereqs,Goals Page	COURSE_TABLE2	Specify the courses that a student must complete before taking this course, as well as target skills and certifications.
Courses - Equipment Page	COURSE_TABLE3	Define required equipment and materials. Add this information only for in-house courses.
Courses - Catalog Page	COURSE_TABLE4	Specify how courses are classified in the catalog.
Courses - Description Page	COURSE_TABLE5	Enter information about course content, target audience, and agenda.

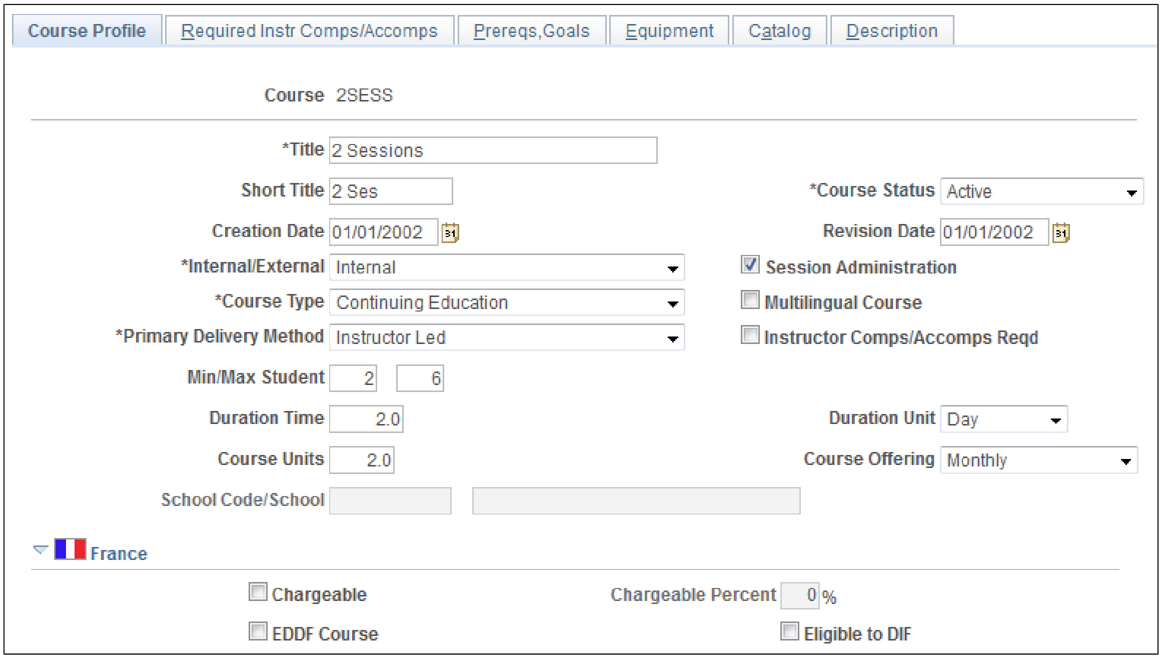
Courses - Course Profile Page

Use the Courses - Course Profile page (COURSE_TABLE1_GBL) to define general course information.

Navigation:

Set Up HCM > **Product Related** > **Enterprise Learning** > **Courses** > **Course Profile**

This example illustrates the fields and controls on the Courses - Course Profile page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Title and **Short Title**	Enter the course title and an abbreviated title.
Course Status	Select from: *Active:* The course is currently available, and you can set up a course session. *Inactive:* You cannot set up a course session *Proposed:* The course is not yet available. You can't set up a course session.
Creation Date	If you're setting up a new course, the system date (usually today's date) appears by default. You can change it.
Revision Date	Enter a revision date when you make changes to an existing course.
Internal/External	Select *Internal* if the course is held in-house and *External* if the course is held offsite.

Field or Control	***Description***
Session Administration	With **Session Administration** selected, you can create course sessions, set up waiting lists, enroll students in courses, and send out form letters. You can select Session Administration for internal and external courses. **Note:** If you can't find a session when you're administering course sessions in the Administer Training business process, check to see if Session Administration is selected for the course code, or check to see if the course session is active.
Course Type	Use this field to categorize the courses. It doesn't affect the way that you administer the course in Human Resources. Select from: *Contin Ed:* Continuing education. *Comp check:* Competency check. *Functional* *Mgmt Devel:* Management development. *Skill Dev:* Skill development. *Supv Skill:* Supervisory skills. *Technical*
Multilingual Course	Select if the course is offered in multiple languages. This check box is available if you selected **Session Administration.**
Primary Delivery Method	Select from: *Audio:* For audio training, such as language tapes. *Computer:* For computer-based training. *Instructor* : For instructor-led courses. *On-the-Job:* For on-the-job training. *Video:* For video-based training. *Workbook:* For self-taught courses with workbooks.
Instructor Comps/Accomps Req (instructor competencies/ accomplishments required)	Select to define a set of instructor competencies and accomplishments for the course. This check box is only available if the **Primary Delivery Method** is *Instructor.* Selecting this check box makes the Required Instr Comps/ Accomps page available.

Field or Control	*Description*
Min/Max Students (minimum/maximum students)	Enter the minimum and maximum number of students that can enroll in the course.
Duration Time	Enter the duration of the course.
Duration Unit	If you completed the **Duration Time** field, select the unit in which duration time is measured.
Course Units	Enter the number of course units for external courses.
Course Offering	Indicate how often the course is offered.
School Code/School	This field is not available for internal courses. For external courses, enter details of the school in the **School Code** or **School** field. If the school doesn't have a code, leave the **School Code** field blank and enter the school name in the **School** field.

(FRA) France

The fields in this group box pertain to French regulatory reporting requirements.

Field or Control	*Description*
Chargeable	Select to have the costs that you enter for this course treated as chargeable, by default, for 2483 reporting. The Compute Student Cost process will consider this option when splitting the training cost by student.
Chargeable Percent	Specify the percentage of this course's time that a student must attend for the course to be considered chargeable. For example, a value of 80% indicates that a student must attend at least 80% of the course for the course to be chargeable.
EDDF Course	Select if this course is eligible for funding under the Engagement De Développment de la Formation (EDDF). Costs related to EDDF courses appear on the 2483 report in Group C – Line 7.
Eligible to DIF	Select to enable students to request the use of DIF entitlement for this course and to enable administrators to record the DIF hours taken.

Related Links

Understanding the French Training Report 2483 Process

Courses - Required Instr Comps/Accomps Page

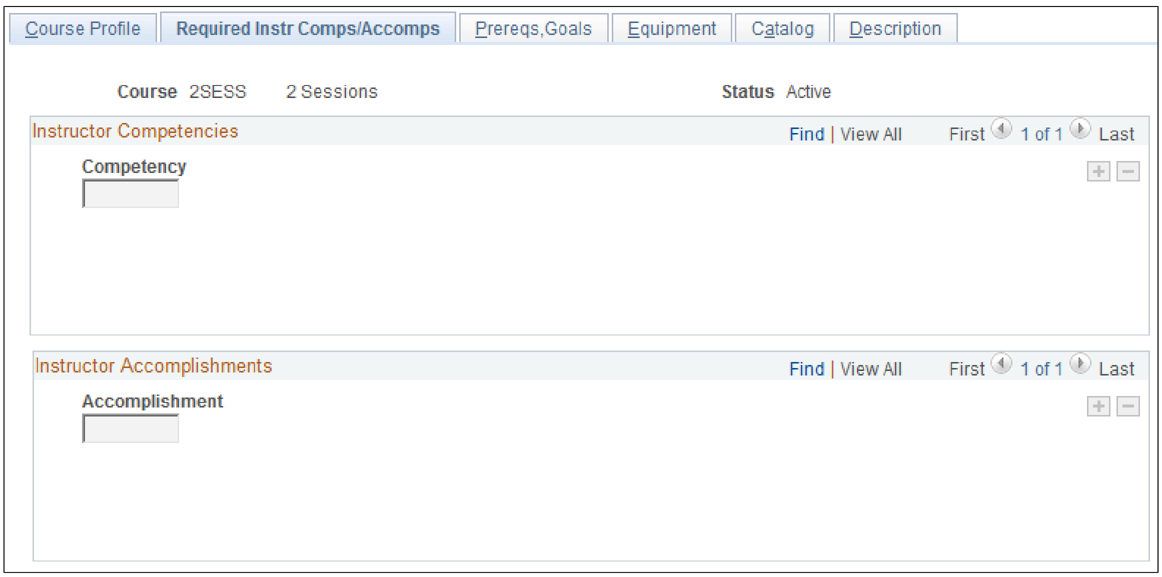
Use the Courses - Required Instr Comps/Accomps (courses required instructor competencies / accomplishments) page (COURSE_TABLE6) to define competencies and accomplishments that instructors need to teach the course.

When you add an instructor using the Instructors component, you can compare the instructor's profile with the course requirements before you add the course to the instructor's list.

Navigation:

Set Up HCM > **Product Related** > **Enterprise Learning** > **Courses** > **Required Instr Comps/ Accomps**

This example illustrates the fields and controls on the Courses - Required Instr Comps/Accomps page. You can find definitions for the fields and controls later on this page.



Note: Select the **Instructor Comps/Accomps Req** check box on the Course Profile page to make the fields on this page available.

Specify the competencies and accomplishments that instructors must have to teach this course. Competencies and accomplishments are defined in the Content Catalog, which is part of the Manage Profiles business process.

Related Links

"Understanding the Content Catalog" (PeopleSoft Human Resources Manage Profiles)

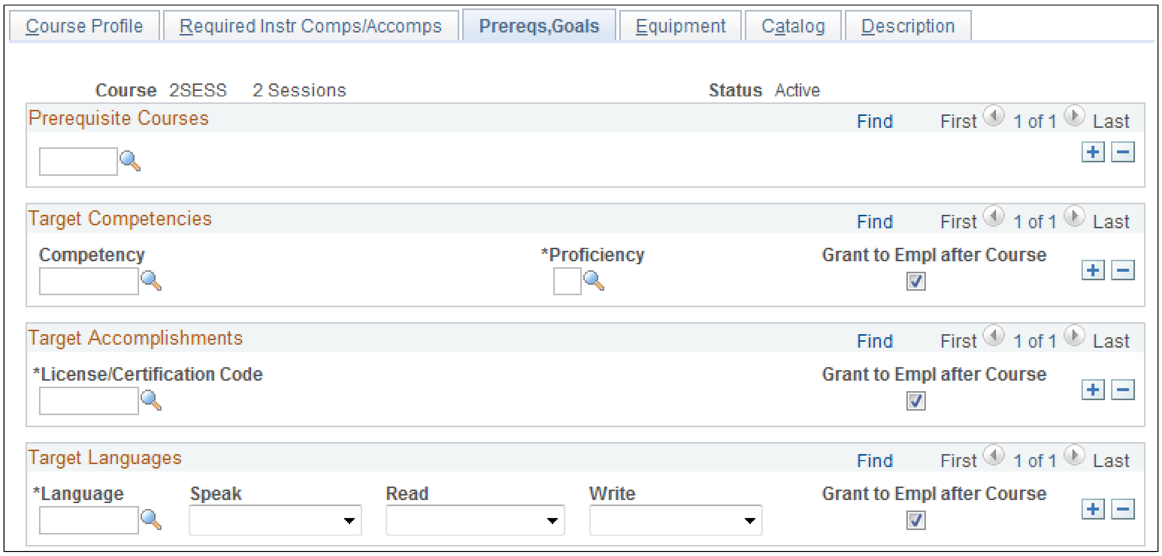
Courses - Prereqs,Goals Page

Use the Prereqs,Goals (prerequisites, goals) page (COURSE_TABLE2) to specify the courses that a student must complete before taking this course, as well as target skills and certifications.

Navigation:

Set Up HCM > **Product Related** > **Enterprise Learning** > **Courses** > **Prereqs,Goals**

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



Prerequisite Courses

Before you can select courses as prerequisites, you have to create them using the Course table. Enter the basic courses first and work your way up to the courses that require prerequisites.

Target Competencies

Field or Control	***Description***
Competency	Select a target competency. Competencies are defined in the Content Catalog, which is part of the Manage Profiles business process.
Proficiency	Select the default proficiency level for a competency that the student receives upon completing the course. For example, a beginner's course competency might give a rating of *Fair,* while an advanced-level course competency could warrant a rating of *Expert.*

Field or Control	***Description***
Grant to Empl after Course (grant to employee after course)	Select to have the system add the selected competency to the employee's profile and set the specified proficiency rating upon completing the course. The system adds the competency to the employee's profile with the profile type PERSON. Competencies that are automatically assigned to an employee's profile have the evaluation type *Approved/Official.*

Target Accomplishments

Field or Control	***Description***
License/Certification Code	Select a code if students are awarded a license or certification upon completion of the course.
Grant to Empl after Course (grant to employee after course)	Select to have the system update employees' profiles upon course completion. The system adds the accomplishment to the employee's profile with the profile type PERSON.

Target Languages

Field or Control	***Description***
Language	Select a language.
Speak, Read, Write	Select *High, Moderate,* or *Low* in each field to indicate the level of proficiency that you expect students to have achieved upon completion of the course.
Grant to Empl after Course (grant to employee after course)	Select to have the system update employees' profiles upon course completion. The system adds the accomplishment to the employee's profile with the profile type PERSON.

Related Links

"Understanding Profile Management" (PeopleSoft Human Resources Manage Profiles)

Courses - Equipment Page

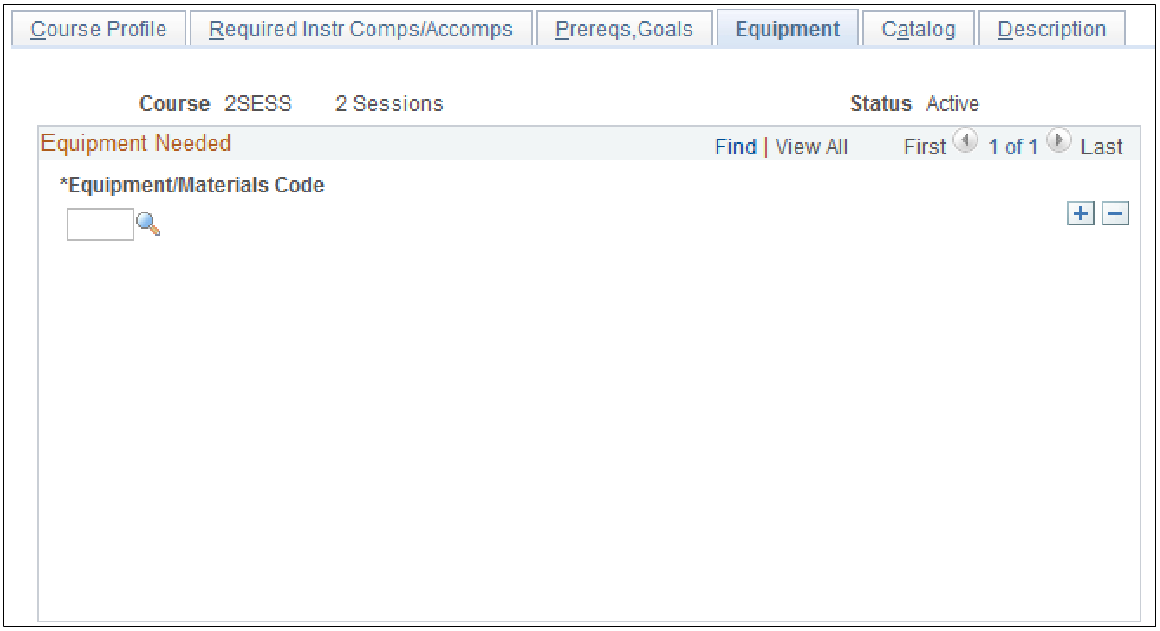
Use the Courses - Equipment page (COURSE_TABLE3) to define required equipment and materials.

Add this information only for in-house courses.

Navigation:

Set Up HCM > **Product Related** > **Enterprise Learning** > **Courses** > **Equipment**

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



Specify the equipment and materials that are needed for the course. Define equipment and materials on the Equipment and Materials page.

Related Links

Setting Up Training Equipment, Materials, and Facilities

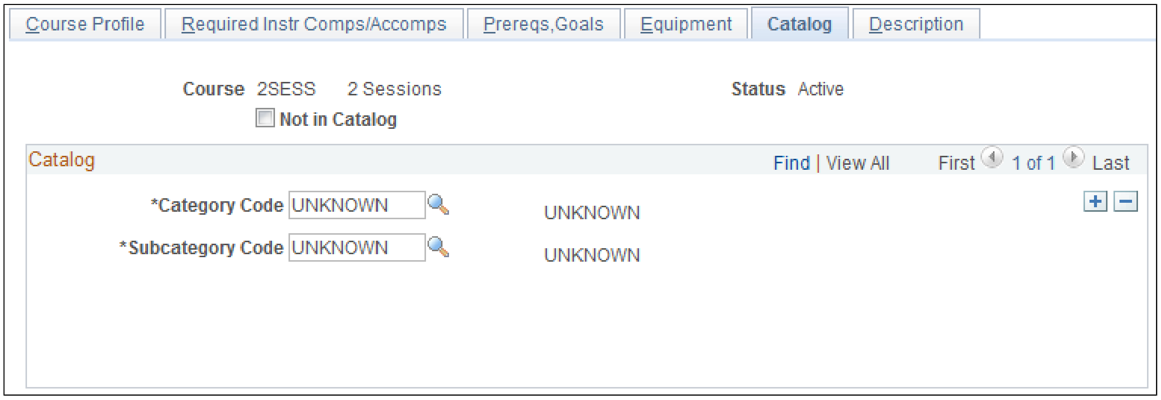
Courses - Catalog Page

Use the Courses - Catalog page (COURSE_TABLE4) to specify how courses are classified in the catalog.

Navigation:

Set Up HCM > **Product Related** > **Enterprise Learning** > **Courses** > **Catalog**

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



Place courses in a catalog to organize training courses into a structure that helps you administer courses more efficiently.

Field or Control	***Description***
Not in Catalog	Select if you don't want to include the course in the catalog. If selected the **Category Code** and **Subcategory Code** fields are unavailable. **Note:** If you've already specified a category or subcategory for a course, and you select this check box, the system clears any category or subcategory information on the page. If you select the check box again later, you have to specify the course category again.

Catalog

Categories define training subjects, and subcategories allow for a more specific definition of subject matter.

Field or Control	***Description***
Category Code and **Subcategory Code**	To add a course to the catalog, select a category code and a subcategory code. Define categories and subcategories on the Category/Subcategory page. To add the course to a different category, insert a new row.

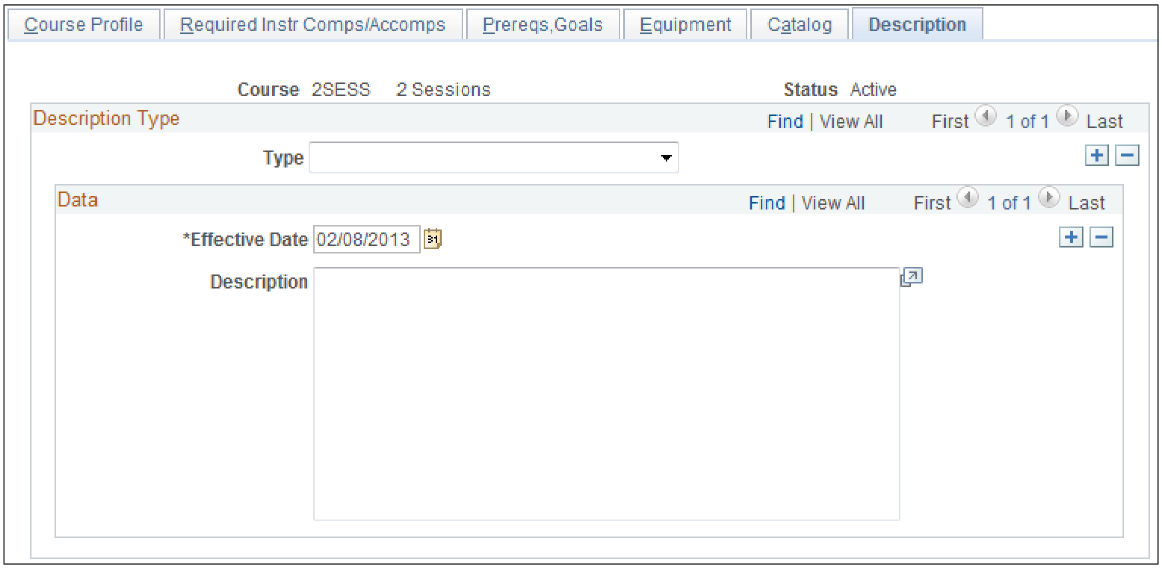
Courses - Description Page

Use the Courses - Description page (COURSE_TABLE5) to enter information about course content, target audience, and agenda.

Navigation:

Set Up HCM > Product Related > Enterprise Learning > Courses > Description

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



Field or Control	*Description*
Type	Select a description type for the type of information to add. Options are *Course Agenda, Course Content, Target Audience,* and *General Information* Enter an effective date and a description for the selected description type. **Note:** The effective date on this page applies only to the description, not to the entire course definition.

Organizing the Course Catalog

To organize the course catalog, use the Organize Catalog Courses (TRN_CATALOG_MOVE) component.

Page Used to Organize the Course Catalog

Page Name	*Definition Name*	*Usage*
Page Used to Organize the Course Catalog	TRN_CATALOG_MOVE	View courses that are associated with a selected category and subcategory. Reorganize the training catalog by moving courses between categories or subcategories.

Organize Catalog Courses Page

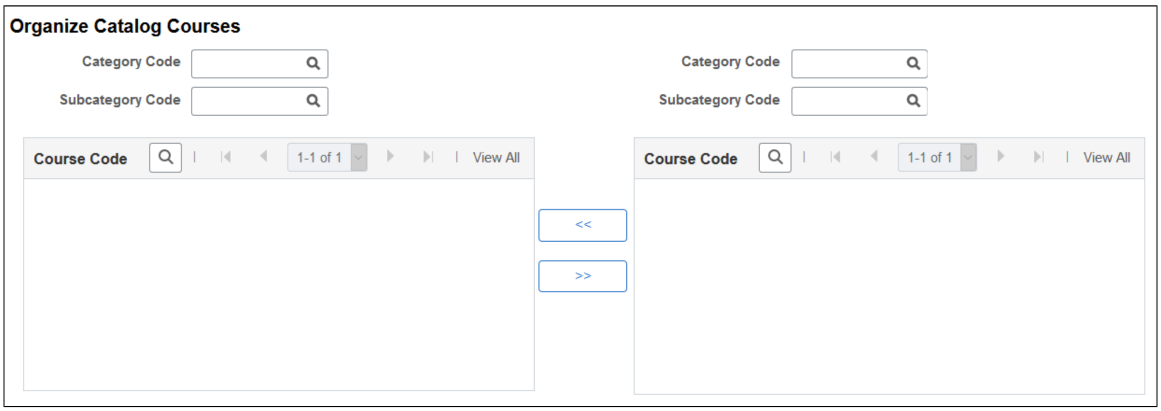
Use the Organize Catalog Courses page (TRN_CATALOG_MOVE) to view courses that are associated with a selected category and subcategory.

Reorganize the training catalog by moving courses between categories or subcategories.

Navigation:

Set Up HCM > **Product Related** > **Administer Training** > **Organize Catalog Courses** > **Organize Catalog Courses**

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



To view courses in a selected subcategory, select the category code and subcategory code in the left or right column. The system lists the courses in that subcategory.

To move courses from one subcategory to another, select the check box next to the course name. In the other column, find the category and subcategory into which you want to move the selected course. Click the appropriate arrow button to move the selected course into the other column.

Setting Up Training Programs

To set up programs, use the Program Information (TRN_PROGRAM_TABLE) component.

Training programs group courses into a logical progression. You can associate training programs with job codes in the Job Code Table.

Page Used to Set Up Programs

Page Name	***Definition Name***	***Usage***
Program Information Page	TRN_PROGRAM_TABLE	Create a training program.

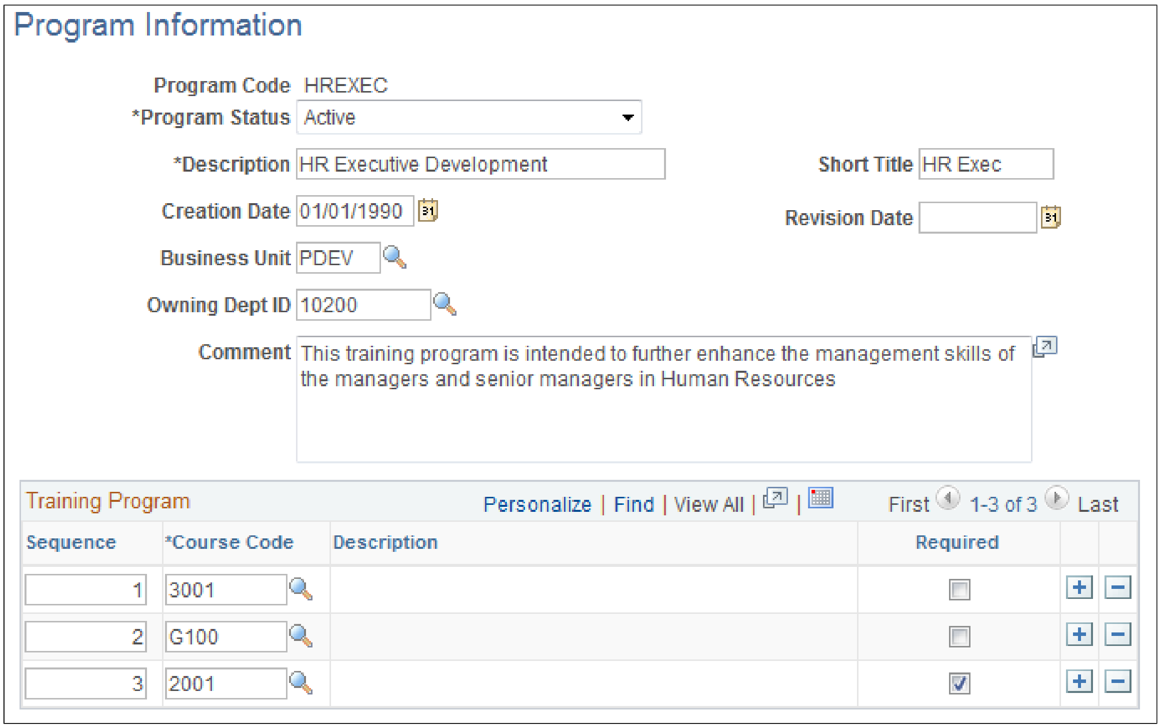
Program Information Page

Use the Program Information page (TRN_PROGRAM_TABLE) to create a training program.

Navigation:

Set Up HCM > Product Related > Enterprise Learning > Program Information > Program Information

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



Field or Control	*Description*
Program Status	Select *Active* (the default), *Inactive,* or *Proposed.*
Short Title	Enter an abbreviated description of the training program.
Creation Date	The default is the system date (usually today's date).
Revision Date	If you update the program later, enter that date.
Business Unit	Select the business unit that you want to associate with this training program.
Owning Dept ID (owning department ID)	Based on the business unit that you selected, select the department that is responsible for maintaining the training program.

Training Program

Field or Control	Description
Sequence	The system sorts courses by course code. If you want the codes that you select in the **Course Code** field to appear in a different order, enter sequence numbers in this field to define the order in which students should take courses. To view the new order, save the changes and close the page. When you open the page again, the courses appear in the new order.
Course Code	Select a code for each course in the training program.
Required	Select if the course is mandatory.

Setting Up Noncourse Training

Use the Non-Course Training (NON_COURSE_TBL) component to set up noncourse training.

Not all training involves taking a course or attending a class, so you may need to establish training IDs for other forms of training, such as multimedia CD-ROM presentations, videos, or self-paced training guides. This topic discusses how to set up noncourse training.

Page Used to Set Up Noncourse Training

Page Name	Definition Name	Usage
Non-Course Training Page	CM_NON_CRSE_TABLE	Track training that isn't course-based.

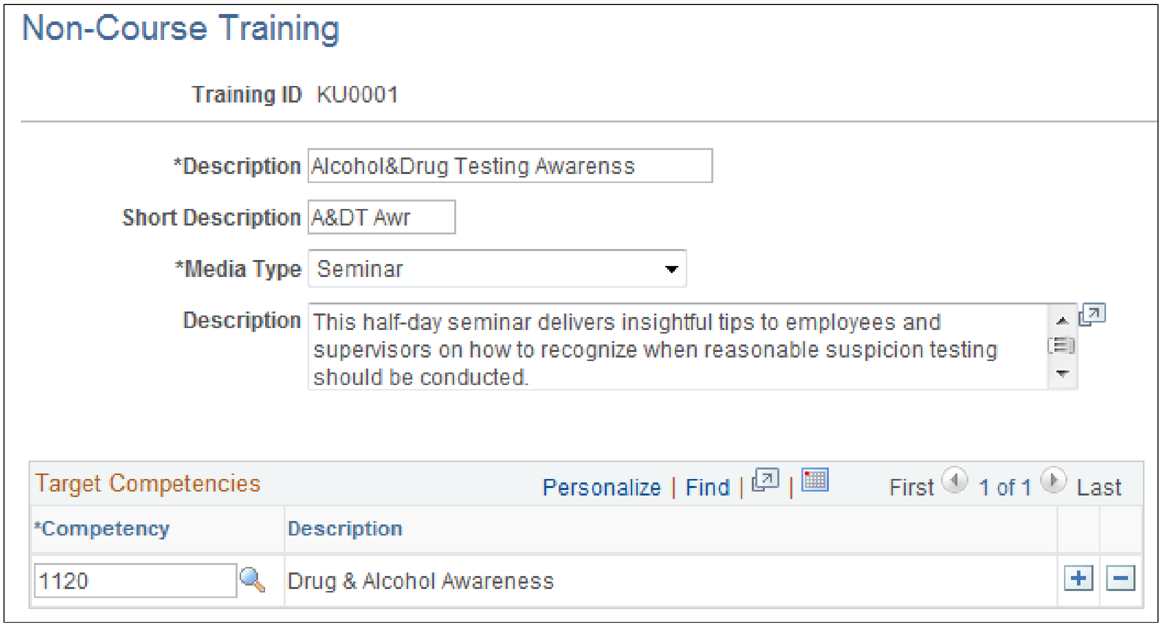
Non-Course Training Page

Use the Non-Course Training page (CM_NON_CRSE_TABLE) to track training that isn't course-based.

Navigation:

Set Up HCM > **Product Related** > **Enterprise Learning** > **Non-Course Training** > **Non-Course Training**

This example illustrates the fields and controls on the Non-Course Training page. You can find definitions for the fields and controls later on this page.



(MEX) Creating Training and Development Plans

Companies that operate in Mexico must create training and development plans for their employees. You can store the details for the training and development plans on the Program Information page.

Each plan identifies the courses and events that meet the training and development needs of the workforce. Each course or event should have a detailed description of the objective and activities. Training can be internal or external. Depending on the type of training, there are specific legal forms to fill out. The mixed committee for training and development must review and approve the training plan.

Related Links

Setting Up Training Programs

Running Training Course and Training Program Reports

This topic discusses training course and program reports.

Pages Used to Run the Reports

Page Name	***Definition Name***	***Usage***
Training Course Category	RUNCTL_TRN024	Run the Course Category report (TRN024), which lists training catalog course categories.

Page Name	***Definition Name***	***Usage***
Training Course Description	RUNCTL_TRN023	Run the Course Description report (TRN023), which lists course descriptions.
Training Course Equipment	RUNCTL_TRN025	Run the Course Equipment report (TRN025), which lists the equipment needed for a course.
Courses - Run Control	PRCSRUNCNTL	Run the Course Table report (PER703), which lists available courses, including course descriptions, type codes, locations, durations, and schools. You can use it to track internal courses and courses offered by outside vendors.
Training Course Vendors	RUNCTL_TRN026	Run the Course Vendors report (TRN026), which lists vendors that are associated with a course on the Course table.
Training Prerequisite Courses	RUNCTL_TRN027	Run the Prerequisites Course report (TRN027), which lists prerequisite courses for a course.
Target Course Certifications	RUNCTL_TRN016	Run the Target Course Certifications report (TRN016), which lists the licenses and certifications that students receive on successful completion of a course.
Training Qualifications	RUNCTL_TRN028	Run the Target Qualifications report (TRN028), which lists the competencies that the course aims to develop or improve.

Chapter 3

Setting Up Training Costs

Understanding Training Costs

These topics provide an overview of training costs

Note: If you aren't administering training budgets, you don't need to set up the budgeting tables discussed in these topics. However, to enter costs on training administration pages, you must set up the Training Base Currency and the Cost Unit tables.

Training Cost and Budget Setup

To administer training budgets, you need to set up a budgeting structure. Once you set up the basic costs, you can enter budgets for departments in the organization.

To set up training costs and budgets:

1. Set up a training currency.

   In Budget Training, the system converts costs into a base currency that you define. For the conversion to work, you also define the exchange rate to use.

2. Review cost units.

   Cost units are associated with a cost amount. For example, you might use a cost unit of hours or days to measure instructor costs, but use a cost unit of kilometers for mileage. To enter a cost, enter the amount and then select a cost unit for that amount. PeopleSoft delivers a set of cost units in the Cost Unit table that you can add to.

3. Set up default vendor, facility, equipment, and instructor costs.

   To create accurate budgets, record default costs, such as vendor or facility costs, for each training resource. You can set up default costs for the catalog and use them as defaults for the course costs.

4. Set up student costs.

   Training budgets include the cost of sending an employee to a course. For example, if an employee's time is normally billed to a client, time in training represents a loss in revenue.

5. Set up budget periods and departmental budgets.

Related Links

Defining Default Training Costs
Defining Student Costs
Defining Training Budget Periods and Department Allocations

Training Currencies

When you review a summary of cost information for an employee in the Budget Training business process, the system displays up-to-date costs without running a periodic batch process to update costs or currency conversion information. The system can provide this immediate, updated cost information because it calculates costs as soon as you enter them into the system. The system converts all amounts to a single base currency and stores the computed costs in two training cost tables, TRN_ALL_COST and TRN_CST_ELEMENT.

When you open a summary page in the Budget Training or Administer Training menu to review cost information for an employee, a department, or the entire organization, the system converts the costs in the training cost tables to the display currency that is appropriate for the organizational level. Display currencies can be different from the training base currency.

Note: Departments can have display currencies that are different from the budget base currency for your organization. Depending on the business unit and the department that an employee belongs to, the employee level display currency could be different from your organizational currency. For a budget period, you associate a base currency with a business unit, and with the departments that are associated with that business unit, in the Budget Information table (BUDGET_PERIOD_TBL).

To provide a consistent means of tracking and maintaining training costs, you specify a training currency exchange rate. This ensures that all training costs are consistently converted over the budget periods using a single conversion rate. Specifying a training currency exchange rate helps insulate a training process from external fluctuations in exchange rates and provides you with consistent cost information through the budget period.

To set up training cost currency information:

1. Create a currency rate type for Budget Training.

   Create a rate type for budgeting on the Rate Type page by selecting **Set Up HCM** > **Foundation Tables** > **Currency and Market Rates** > **Currency Exchange Rate Types.**

2. Set up a training currency exchange rate.

   Define the exchange rates that you want the budgeting processes to use by selecting **Set Up HCM** > **Foundation Tables** > **Currency and Market Rates** > **Market Rates.**

3. Set up the base currency for Budget Training.

   Even if you have already defined a base currency for PeopleSoft HCM in step 1, you must define a special training base currency before you can establish any training costs in the Training Administration business process.

Training Base Currency Defaults

When you're entering training costs on the Training Administration and Budget Training pages, you need to understand where the default currency code is coming from and how the system determines the currency defaults in the Administer Training business process.

In Budget Training, a further level of currency manipulation considers the nature of the cost before any cost conversions are performed.

A relationship is established between the nature of the cost and the use requirement at cost summary time. The nature of the cost describes the point in the business process at which you are reviewing costs. The following table describes this relationship:

Nature of Cost	***Process Status***	***Currency Used for Costs***
Budget training plan level	Overall training plan cost summary for specified budget period.	Currency that is defined in the Budget Information table.
Department level	Case 1: A budget has been allocated to the current department. Case 2: Current department isn't allocated a budget.	Case 1: Per unit cost base currency code that is defined in the Department Budget table. Case 2: Base currency that is defined in the Base Currency table for this business process.
No budget period or department; for example, employee training cost.	Specific to nonbudgeted training.	Currency that is defined in the system Installation table.

Training Cost Currency Conversions

The following table explains the training cost currency defaults in the Budget Training and Administer Training business processes. The table also details how the system uses the budget period begin dates or effective dates to establish the exchange rate to use for converting costs from one currency to another.

Cost Type	***Currency***
Training element cost; for example, facility cost	Costs are stored in the currency that you enter.
Course costs and catalog costs	Costs are stored in table TRN_ALL_TABLE in the entered currency. Computed costs are stored in TRN_CST_ELEMENT with the base currency. The system uses the effective date that is entered on the page as the currency conversion date.
Salary costs (general demand)	Costs are stored in table TRN_DEMAND in the currency that you entered. The system stores computed costs in TRN_CST _ELEMENT in the base currency. The date that the system uses for the conversion from the entered currency to the base currency is the begin date of the budget period for which the demand was defined.
Displayed costs (summary pages, budget plan)	The system converts costs from the base currency to the displayed currency. The date that the system uses for the conversion is the begin date of the budget period.

The date that the system uses to convert to the base currency and the date that the system uses to convert to the display currency are not the same, except for the job code cost. The system uses the effective date of the course and catalog costs to convert to the base currency and the begin date of the budget period to convert to the display currency.

The system uses different dates to process the two currency conversions. If the length of time between the two dates is great enough to allow for changes in the currency conversion rate that your organization ordinarily uses, the displayed cost could be different from the cost that you originally entered. To avoid this problem, you define a special exchange rate on the Exchange Rate table for use by the Budget Training business process.

Because you are comparing training budgets with training costs over a period of time (budget period), you set up a unique training currency exchange rate that enables you to track training costs consistently through the budgetary cycle. To do that, you set up an exchange rate type specifically for the training budget.

Related Links

Defining Default Training Costs

Defining Student Costs

Selecting the Base Currency for Training Costs

To define the base currency for training costs, use the Base Currency (TRN_BASE_CURRENCY) component.

The first step in setting up training costs is to define the currency to be used in the Budget Training business process. Use this component to convert all costs to one common currency that appears in the training plan and is the sum of all training costs.

This topic discusses how to select the base currency and the exchange rate type.

Page Used to Select the Base Currency for Training Costs

Page Name	***Definition Name***	***Usage***
Exchange Rate Page	TRN_BASE_CURRENCY	Specify the base currency to use to track all cost amounts.

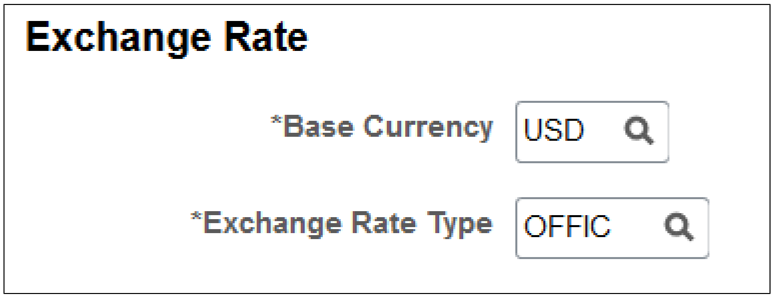
Exchange Rate Page

Use the Exchange Rate page (TRN_BASE_CURRENCY) to specify the base currency to use to track all cost amounts.

Navigation:

Set Up HCM > **Product Related** > **Administer Training** > **Exchange Rate** > **Exchange Rate**

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



Warning! Set the base currency before entering costs in Budget Training.

Field or Control	***Description***
Base Currency	Select a currency code. While you can enter training costs in multiple currencies, the system converts any training costs in an Administer Training business process to the base currency that you enter here.
Exchange Rate Type	If you defined an exchange rate type for training, associate it with the base currency here. The exchange rate type that you specify controls currency conversion processing in the Administer Training and Budget Training modules. Define exchange rate types on the Currency Exchange Rate Types page. **Note:** You can define a currency exchange rate and currency exchange rate type specifically to track training budget costs.

Related Links

Defining Default Training Costs

"Understanding Currency" (Application Fundamentals)

Setting Up Training Cost Units

These topics provide an overview of training cost units and discuss how to specify the relationship between the cost unit and duration label.

Understanding Training Cost Units

When you enter costs for facilities, vendors, books, and other training-related items, you associate the amount with a cost unit, such as hour or flat cost, as a measurement criterion. The cost units from which you can select depend upon the type of cost (the cost unit type) that you're entering.

Using Views to Select the Right Cost Unit

To ensure that the system displays appropriate cost units when you enter different cost categories, the Cost Unit field prompts to a view that selects one or several cost units by specifying the cost unit type that is associated with the cost unit. For example, when you enter instructor costs, the cost unit prompts to the view TD_COST_UNIT_VW, which selects *Time* and *Training* cost units only.

For expenses, the system performs no special cost unit type selection: you can select any Cost Unit table (COST_UNIT_TABLE) values.

Using Cost Type and Duration Amounts

The duration cost unit is a display-only label that is based entirely on the cost unit that you select as the per unit cost to which the duration value is related. For example, when you enter a cost for instructors on the Course Session Cost table, two instructors might teach the same course session. They might work together to teach the course session at the same time, or one might present one portion of the session, and the other might may present a different portion. In either case, you need to specify how long each instructor works on this course session.

You enter a duration period for each instructor. The unit for this duration period depends on the cost unit that you selected as the per unit cost amount for the instructor:

- If the instructor cost is 200 USD per person, per day, the duration cost unit is in days.
- If the instructor cost is 200 USD per person, per year, the duration cost unit is in years.

Page Used to Modify Training Cost Units

Page Name	***Definition Name***	***Navigation***	***Usage***
Cost Unit	COST_UNIT_TABLE	**Set Up HCM** > **Product Related** > **Enterprise Learning** > **Cost Unit** > **Cost Unit**	Specify the relationship between the cost unit and the duration label.

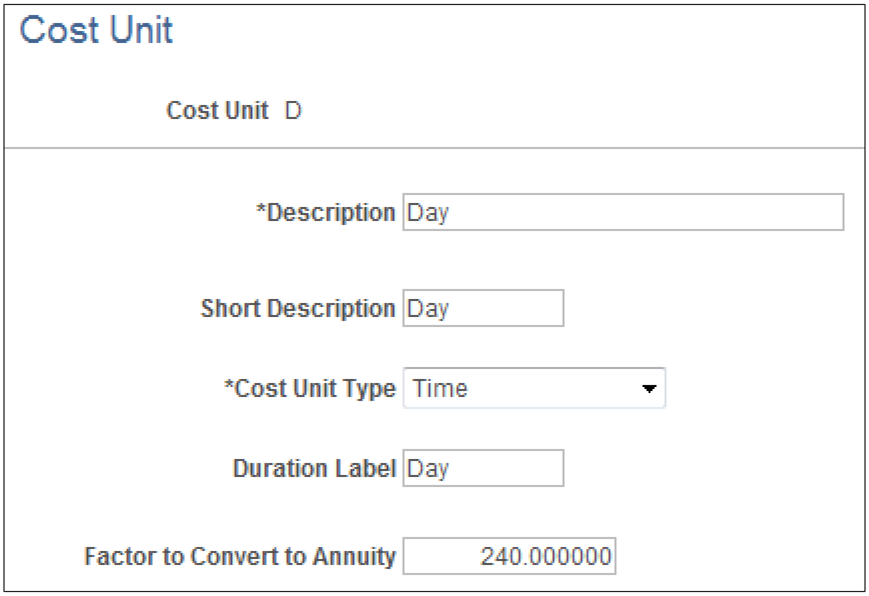
Cost Unit Page

Use the Cost Unit page (COST_UNIT_TABLE) to specify the relationship between the cost unit and the duration label.

Navigation:

Set Up HCM > **Product Related** > **Enterprise Learning** > **Cost Unit** > **Cost Unit**

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



Warning! Changing data on this page can negatively affect the way that the system calculates expenses and can require additional PeopleCode changes and other modifications that affect all Budget Training cost calculations.

Note: (FRA)**Company Costs,** *C,* defines costs that are to be charged at the company level. This value is defined on the Trn 2483 Parameters Setup page and is fully reported on the 2483 report.
Paid Hours, *P,* is used by the system as the default during duration conversion.
For a more accurate computation with cost–based on employee salary, use the cost unit, *P.* When prorating the student/instructor monthly salary with the session duration, the proration is done with the paid hours field instead of the factor. For example if the session is equal to 10 hours, and the instructor is paid 200 EUR per hour, when you look on the Trainees Salary Costs page for this employee, you will see that the salary for January is 200 EUR per month, and the **Paid Hours** are 180 hours.
When prorating the instructor costs with the session duration, you get 200 / 180 * 10. If the cost unit were *Pers/Month,* the computation rule would be 200 / (1920/12) *10= 200/160 * 10.

Field or Control	***Description***
Cost Unit	Cost units are delivered as system data. **Note:** (FRA) Cost unit *C* represents company costs. These costs are fully reported on the 2483 report. Cost unit *P* represents paid hours. When the system calculates an employee's salary costs while attending a session, it can use cost unit *C* (paid hours) rather than the factor entered in the Factor to Convert to Annuity field to prorate the employee's monthly salary based on the session duration.

Field or Control	Description
Cost Unit Type	Select a cost unit type to group similar cost units together. As you identify training costs in a business process, you enter units of cost (such as instructors) for each training component. Options are: *Metrics:* For expensing traveled distances (for example, miles or kilometers). *Time:* For time duration (for example, hour or day). *Training:* For training cost types (for example, flat cost or person per day). *General:* For when you don't know the cost type. *Company:* For costs that are to be charged at the company level.
Duration Label	Enter the duration label to use for specifying instructor cost details. The unit of this duration depends on the cost unit that you select. For example, if the instructor cost unit is 200 USD per person, per day, the duration is expressed in days.
Factor to convert to annuity	This field only appears when the cost unit type is *Time.* It specifies how many units there are in a year. For example, if the cost unit is D (day), a factor of 240 means that there are 240 days in the year. The delivered values are as follows: For cost unit D (day), the factor is 240 and is based on 20 days per month. For cost unit H (hour), the factor is 1920 and is based on 8 hours per day and 20 days per month. For cost unit M (month), the factor is 12. For cost unit W (week), the factor is 48 and is based on 4 weeks per month. For cost unit Y (year), the factor is 1. You cannot change this value.

Note: If you need to modify the factor, do so before entering any costs in the system. Cost elements are updated online as soon as training element costs are entered. If you change the annuity factor during a budget period, costs already computed are not affected.

Defining Default Training Costs

To set up default training costs, use the Define Training Costs (TRN_COST_TABLEC) and the Course Costs (TRN_COST_TABLE) components.

These topics list prerequisites, provide an overview of default training costs, and discuss how to:

- Enter vendor, facility, and equipment costs.
- Enter instructor costs and other expenses.

Understanding Default Training Costs

Some costs that you enter in the Catalog Cost table, the Course table, and Course Session Cost table tend to be the same. For example:

- Instructors tend to charge the same fee for teaching different courses.
- Facility costs and vendor costs tend to remain constant for different courses.

Define Training Costs

Use the Catalog Cost component to record cost information for a particular category and related subcategories in a training catalog. This information can be used as default values for the Course Cost component.

In a course catalog, you can organize the courses into categories and subcategories for easier administration. You can associate a cost with each category and subcategory. Then when you assign a course to a category and subcategory, the system assigns the subcategory cost as the default cost of the course.

If you assign a course only to a category, the system uses the category cost. If you assign the course to a subcategory, the system uses the subcategory cost. Using subcategories enables you to define the default values more exactly, but they might not be necessary for your organization.

Course Session Costs

Specifying costs at the course session level enables you to track differences in training costs that can vary depending on where sessions are taught and who is teaching. This is important because different instructors may charge different rates to teach the same sessions of a course. When you enroll a student in a session, the system looks at the Course Session Cost table to determine how much the training will cost.

Note: The Catalog Cost and Course Cost components are nearly identical and share the same fields.

Note: The Budget Training process uses catalog and course costs only. Cost demands can also occur on the catalog and course level. Session costs are only used by the Administer Training business process. When trainees are enrolled in a session, Administer Training computes the cost at a session level.

Related Links

Understanding Course Sessions

Prerequisites

Before you define default costs for courses, you must set up training courses.

Related Links

Understanding Course and Program Setup

Pages Used to Set Up Default Training Costs

Page Name	*Definition Name*	*Navigation*	*Usage*
Define Training Costs - Vendor, Facility, Equipment Page	TRN_COSTC_TBL1_GBL	**Set Up HCM** > **Product Related** > **Administer Training** > **Define Training Costs** > **Vendor, Facility, Equipment**	Enter the default vendor, facility, and equipment costs for a category or subcategory that is defined on the Category/Subcategory Table page.
Define Training Costs - Instructor, Expense Page	TRN_COSTC_TBL2_GBL	**Set Up HCM** > **Product Related** > **Administer Training** > **Define Training Costs** > **Instructor, Expense**	Enter default instructor costs and other expenses that are associated with courses in a selected category or subcategory.
From which Category / Sub-Category Page	TRN_CATLG_CRSE_SEC	Click the **Default Costs** button on the Define Training Costs - Vendor, Facility, Equipment page or the Course Costs - Vendor, Facility, Equipment page.	Select the source of default costs.

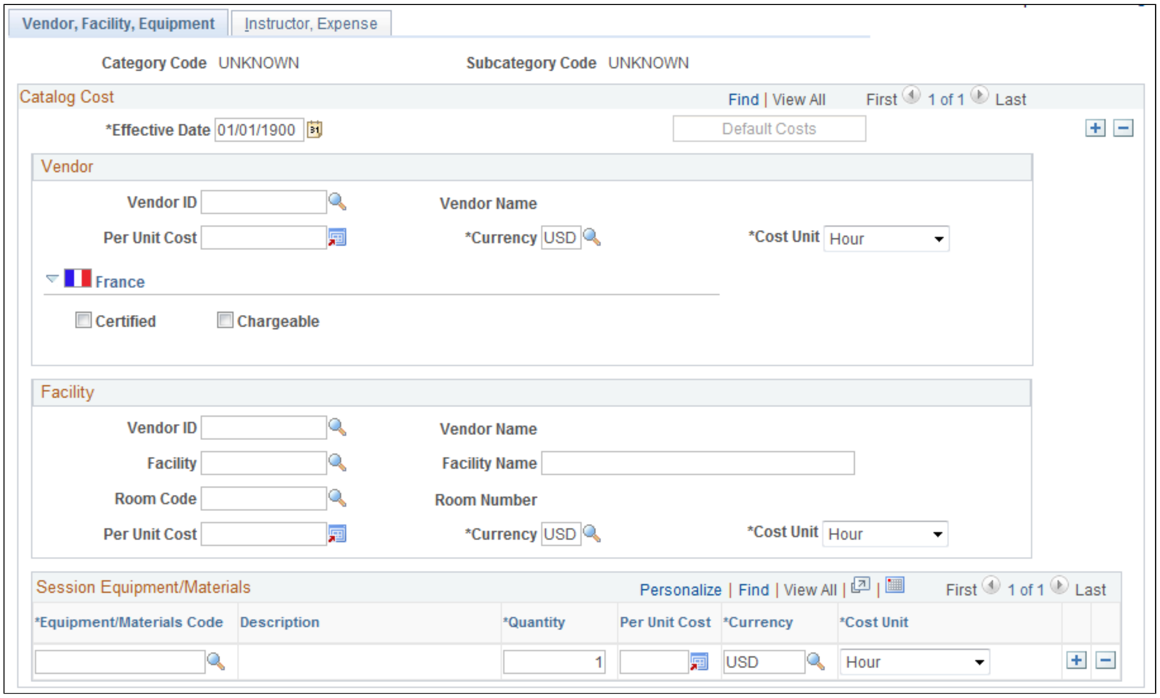
Define Training Costs - Vendor, Facility, Equipment Page

Use the Define Training Costs - Vendor, Facility, Equipment page (TRN_COSTC_TBL1_GBL) to enter the default vendor, facility, and equipment costs for a category or subcategory that is defined on the Category/Subcategory Table page.

Navigation:

Set Up HCM > **Product Related** > **Administer Training** > **Define Training Costs** > **Vendor, Facility, Equipment**

This example illustrates the fields and controls on the Define Training Costs - Vendor, Facility, Equipment page. You can find definitions for the fields and controls later on this page.



Note: The Course Cost - Vendor, Facility, Equipment page uses the same page setup as the Define Training Costs - Vendor, Facility, Equipment page.

Field or Control	***Description***
Default Costs	Click to populate the cost fields with default costs that you have defined for the category or subcategory. The From which Category / Sub-Category page appears. You can use default course costs from a category or a subcategory according to the catalog structure. To use costs from the category level, select the category code and enter UNKNOWN in the Subcategory Code field.

Vendor

If an external vendor runs the course, define the default vendor costs here.

Field or Control	***Description***
Vendor ID and **Vendor Name**	Select and display the default vendor for the category or subcategory.
Per Unit Cost	The system displays the cost that you defined, if any, on the Vendor table for the selected vendor. You can override the default value.

(FRA) France

Field or Control	*Description*
Certified	Select if the vendor is certified to provide the training courses.
Chargeable	Select to make the training course a chargeable item for the 2483 report. When selected, related costs that you enter are reported in the 2483 report. This is used to meet French legal reporting requirements. The system derives the default value from the chargeable flag set in the Course setup page and by the Compute Student Cost process.

Facility

If you use a vendor's facility for the course, complete the fields in this group box, as applicable.

Field or Control	*Description*
Vendor ID and **Vendor Name**	Select and display the default vendor for the facility.
Facility and **Facility Name**	Select a facility that you defined using the Training Facilities (TRN_FACILITY_TBL) component. If the facility has not been defined. Or, enter the facility name in the **Facility Name** field.
Room Code and **Room Number**	Select a room for the courses from the list of rooms that are available at the selected facility. The room number associated with this code displays.
Per Unit Cost	By default, the system displays the room cost from the Training Facilities component. You can override the default. If you didn't select a training facility in the Facility field, enter the cost of the room and the associated cost unit.

Session Equipment/Materials

Field or Control	*Description*
Equipment/Materials Code	Select the equipment code. Insert a row for each equipment or material code required for the course. Define equipment and materials on the Equipment and Materials page.

Field or Control	***Description***
Per Unit Cost	Enter a per unit cost for each item.

Related Links

Understanding Training Costs
Understanding the French Training Report 2483 Process

From which Category / Sub-Category Page

Use the From which Category / Sub-Category page (TRN_CATLG_CRSE_SEC) to select the source of default costs.

Navigation:

Click the **Default Costs** button on the Define Training Costs - Vendor, Facility, Equipment page or the Course Costs - Vendor, Facility, Equipment page.

Field or Control	***Description***
Category Code	Select the category code from the list of categories to which the course belongs.
Subcategory Code	Select the subcategory codes. To use costs from the category level as the default costs, select the category code and enter *UNKNOWN* in the **Subcategory Code** field.

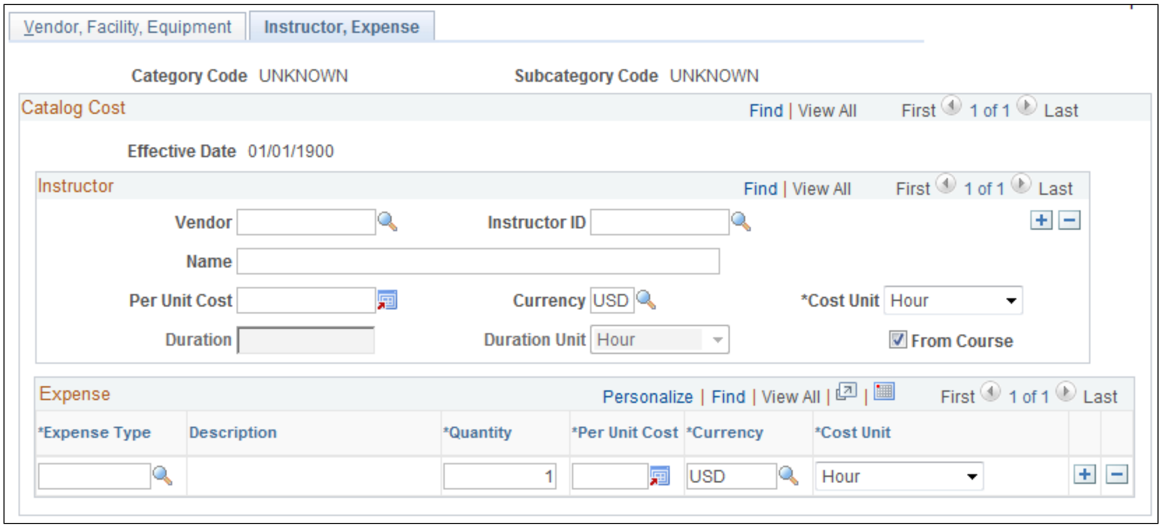
Define Training Costs - Instructor, Expense Page

Use the Define Training Costs - Instructor, Expense page (TRN_COSTC_TBL2_GBL) to enter default instructor costs and other expenses that are associated with courses in a selected category or subcategory.

Navigation:

Set Up HCM > **Product Related** > **Administer Training** > **Define Training Costs** > **Instructor, Expense**

This example illustrates the fields and controls on the Define Training Costs - Instructor, Expense page. You can find definitions for the fields and controls later on this page.



Note: The Course Cost - Instructor, Expense page uses the same page setup as the Define Training Costs - Instructor, Expense page.

Instructor

Field or Control	*Description*
Vendor	If an external vendor runs the course, select the vendor. Define vendors using the Vendors (TRN_VENDOR_TABLE1) component. If you're using an internal instructor, leave this field blank.
Instructor ID and **Name**	If the instructor is defined in the Instructor table, select the instructor ID. Otherwise leave this field blank and enter the instructor's name in the Name field.
Per Unit Cost	This value is automatically populated from the Instructor table. You can override the default cost.
Duration	This field is automatically populated with the Duration value that you set up on the Course Table - Course Profile page. To override the default, deselect the **From Course** check box and enter the new value.
From Course	This check box is automatically selected to show that the **Duration** field is populated from the Course table.

Expense

Field or Control	***Description***
Expense Type	Select the expense type.
Quantity	Enter the quantity of the item that is specified in the **Expense Type** field.
Per Unit Cost	Enter the per unit cost for the expense.

Defining Student Costs

To set up student costs, use the Job Code Salary Costs (TRN_JOB_SLR_COST) and the Trainees Salary Costs (TRN_EE_SALARY_COST) components.

These topics provide as overview of student costs and discuss how to:

- Identify the training compensation cost by job.
- Identify the training compensation cost by employee.
- Process salary costs for a group.

Understanding Student Costs

To track the total cost of an employee who is taking a training course, you need to record:

- The costs that are associated with the course, such as the price of materials and instructors.
- The cost to the organization of the employee's lost work time.

  For example, if employees typically bill their time to clients, then they cannot bill time while they are in training. This represents an additional training expense.

To track payroll costs that are associated with training, you can specify compensation costs at the job code level and at the individual employee level. To associate payroll costs with a group of similar job codes or a group of employees, use the Update Salary Costs page to perform a mass update of the system.

Note: When the system processes training costs for an employee, and no employee training cost is specified on the Employee Training Cost table, the system uses the job code salary cost. If you've specified training costs at both levels, the employee-level cost takes priority.

(FRA) Importing Salary Costs from Payroll

(FRA) If your organization uses PeopleSoft Global Payroll for France, you can extract costs from the payroll system and apply the costs to employees in a specified group ID.

Source of Default Costs for Job Code and Employees

Before you begin entering costs that are associated with job codes and employees, it's important to understand how the system determines the default training cost values that it displays on the system pages where you track training costs. The following chart explains the training cost defaults in the Budget Training business process:

Page Name	***Default Comes From***
Job Code Salary Cost	No default.
Trainees Salary Costs	Job Code Salary Cost page.
Employee Demand	1. Trainees Salary Costs page, when defined. 2. Otherwise Job Code Salary Cost page (with employee's job code). 3. Otherwise default values are set to blank.
General Demand	Default values are set to blank; however, when a profile is used as a template, the training cost is computed with the employees and job codes that are included in the profile. Click the Compute button to compute the training cost with the job codes that are listed on the page.
Department Demand	No default.
Employee Demand by Course	Same as the Employee Demand page.

Pages Used to Set Up Student Costs

Page Name	***Definition Name***	***Usage***
Job Code Salary Costs Page	TRN_JOB_SLR_COST	Identify the compensation cost of having an employee in this job code in training.
Trainees Salary Costs Page	TRN_EE_SALARY_COST	Identify the cost of having an employee in training.
Update Salary Costs Page	RUNCTL_TRN006	Process training costs for a group of job codes or employees.

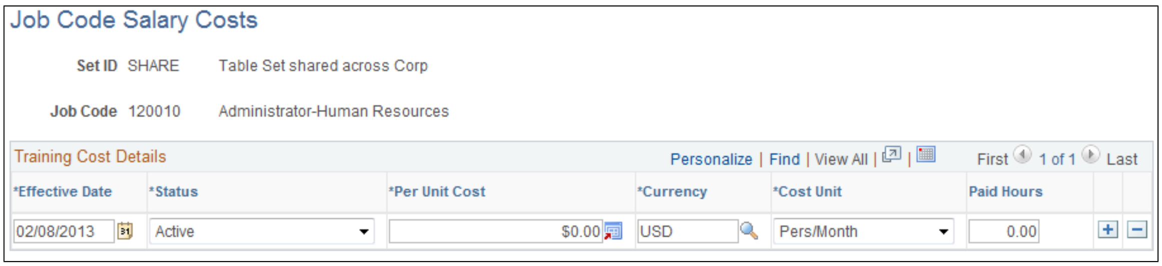
Job Code Salary Costs Page

Use the Job Code Salary Costs page (TRN_JOB_SLR_COST) to identify the compensation cost of having an employee in this job code in training.

Navigation:

Set Up HCM > **Product Related** > **Enterprise Learning** > **Job Code Salary Costs** > **Job Code Salary Costs**

This example illustrates the fields and controls on the Job Code Salary Costs page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Per Unit Cost and Cost Unit	Enter the per unit cost for the job code and the unit cost. Because the **Per Unit Cost** and **Cost Unit** fields are effective-dated, you can enter standard training costs for job codes, which can change over time.
Paid Hours	Displays the total number of hours worked by an employee for which they are paid. If you select *Apply on Jobcodes* or *Apply on Employees* in the **Populate Process Mode** group box on the Update Salary Cost-Learning, Define Budget, Update Salary Costs page, you may manually enter the hours that the employee works. If you select *Load from Global Payroll* in the **Populate Process Mode** group box on the Update Salary Cost-Learning, Define Budget, Update Salary Costs page, the system gets the value for **Paid Hours** from payroll and is deactivated for manual entry. **Note:** The system derives this value from payroll. Paid Hours calculates how many hours the employee works for the related cost unit, that is, if the cost unit is Pers/Month, then the number of hours is related to one month.

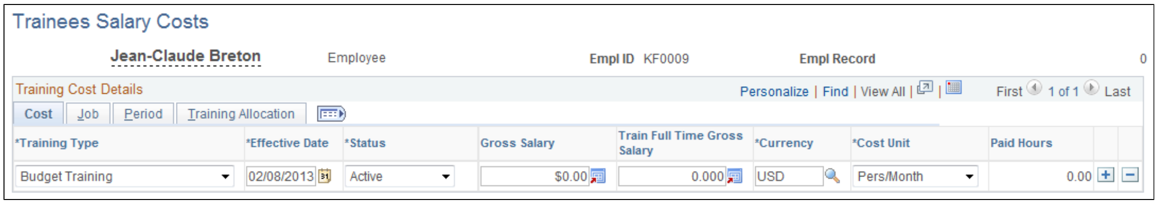
Trainees Salary Costs Page

Use the Trainees Salary Costs page (TRN_EE_SALARY_COST) to identify the cost of having an employee in training.

Navigation:

Set Up HCM > **Product Related** > **Enterprise Learning** > **Trainees Salary Costs** > **Trainees Salary Costs**

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



Common Page Information

Field or Control	***Description***
Training Type	Select one of these options: • *Admin. Trn* (administer training). Select this option if the cost is an administered course cost. See Understanding Training Cost Tracking. • *Budget Trn* (budget training). Select this option if the cost is a budgeted training cost. See Understanding the Training Budget Planning Process.
Gross Salary	Enter the employee's gross salary before deductions.
Train Full Time Gross Salary	If the employee works full time for the training department, enter the gross salary. If you select the Full-Time Instructor check box on the Instructor page, the payroll system considers that instructor full-time.
Paid Hours	Enter the total number of hours the employee works for the related cost unit. For example, if the cost unit is Pers/Month, then the number of hours is related to one month. If you selected *Apply on Jobcodes* or *Apply on Employees* enter the number of hours that the employee worked. If you selected *Load from Global Payroll* the system displays the value that is retrieved by the Salary Cost Mass Update process. You cannot change the value here.

Job tab

Field or Control	***Description***
Job Code	Displays the employee's job code from the Job Data table.

Period tab

Field or Control	***Description***
Period Begin Date	This field is used for the effective date and the effective date is always equal to the period begin date.
Period End Date	Enter the end of the period in which the cost that you specified becomes effective. If you have separate costs for Administer Training and Budget Training, the period over which costs apply varies. Administer Training costs cover pay periods, whereas Budget Training costs apply to budget periods, which normally cover a year. Be sure that all these periods are contiguous to ensure accuracy in total compensation.
Calc. Flag (calculate flag)	This field identifies the source of the cost information: *Manually,* indicates that the employee's cost data was manually entered on this page. *Job Code, Employee,* or *Payroll,* indicate that the data was loaded by the Salary Cost Mass Update process that you run from the Update Salary Costs page.
Company	Select the employee's company.

Related Links

Understanding the French Training Report 2483 Process

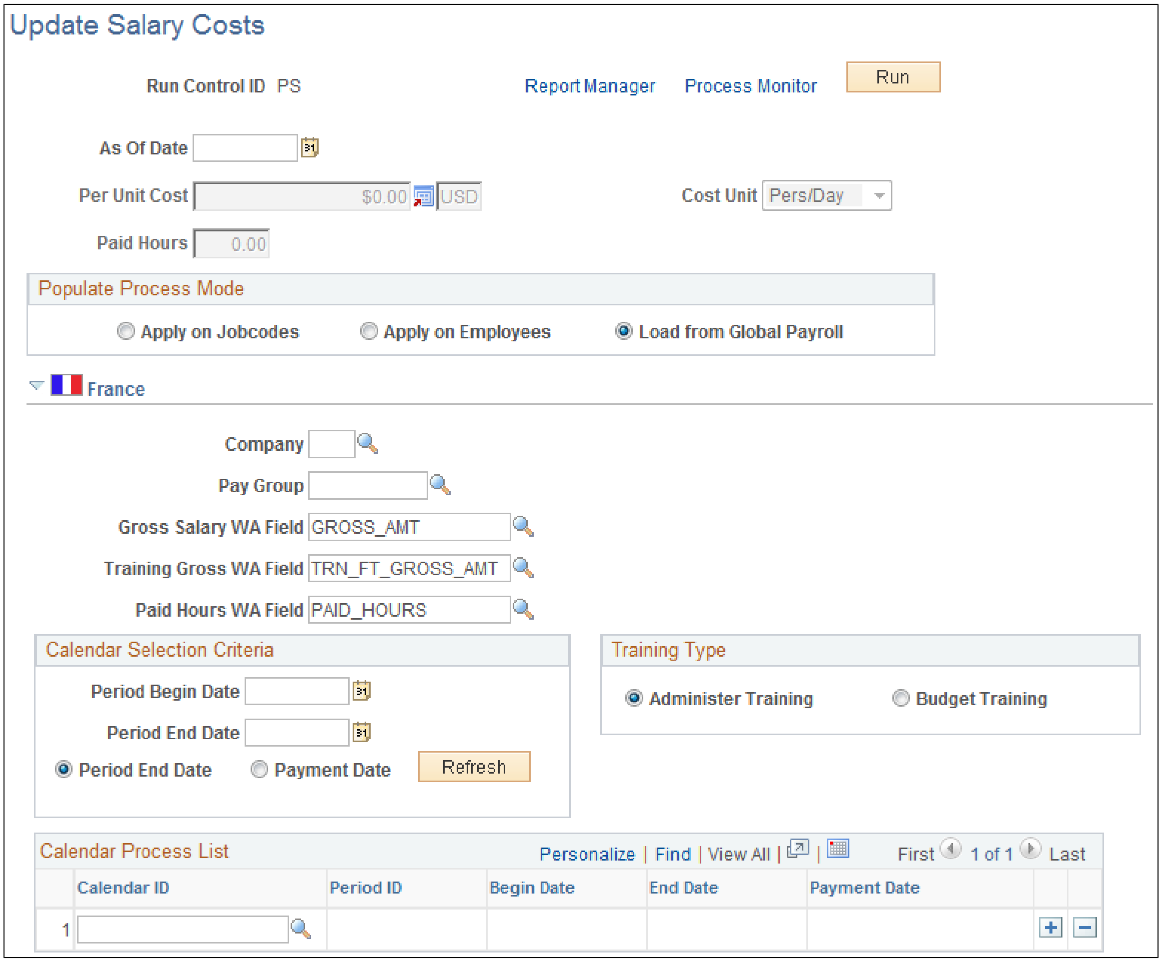
Update Salary Costs Page

Use the Update Salary Costs page (RUNCTL_TRN006) to process training costs for a group of job codes or employees.

Navigation:

Administer Training > **Define Budget** > **Update Salary Costs** > **Update Salary Costs**

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



Note: The Job Code Salary Costs and Trainees Salary Costs pages enable you to associate payroll costs with a job code and by employees one at a time. Use the Update Salary Cost process to specify a per cost figure and a cost unit metric to apply on the specified effective date to a group of job codes or employees.

Field or Control	***Description***
As Of Date	Enter the effective date for this process. This date is used to **Effective Date** and **Period Begin Date.**
Per Unit Cost	Enter the cost to use for processing the cost per job or cost per employee. (FRA) Selecting **Load from Global Payroll** disables this field.

Populate Process Mode

Field or Control	***Description***
Apply on Jobcodes	Select to apply the cost to employees with a specified job code.
Apply on Employees	Select to apply the cost to given employees.
(FRA) Load from Global Payroll	Select to apply costs from Global Payroll for France to a group of employees. The system displays the France group box.

Set ID and Job Code

This group box appears when you select *Apply on Job Code* or *Apply on Employees*. Select the set ID and job code to which you want to apply the selected cost. Add as many setIDs and job codes as necessary.

(FRA) France

This section becomes available when you select *Load from Global Payroll.*

In Global Payroll for France, writable array elements are used to store payroll results. The payroll system computes the salary and paid hours for training, and uses the writable array, FOR WA 2483, to store the results in the GPFR_TRN_WA record. When you run the Update Salary Costs process, salaries and paid hours are imported from the writable array.

This is a single table which interfaces between the payroll system and the training business process. When using a payroll system other than PeopleSoft, the table can be used to import salaries into the training business process.

See “Accruals” (PeopleSoft Global Payroll for France) and “Paid Vacation Accruals Calculations” (PeopleSoft Global Payroll for France).

Calendar Selection Criteria

In this group box, define the criteria for selecting the payroll calendars

Field or Control	***Description***
Period Begin Date	Select the period begin date for salary training costs, usually the beginning of the fiscal year.
Period End Date	Select the period end date for salary training costs, usually the end of the fiscal year.
Period End Date and Payment Date	Select the date that“Accruals” (PeopleSoft Global Payroll for France) signifies the end of the period.

Field or Control	***Description***
Refresh	Click to have the system insert all payroll calendars that occur within the specified period into the Calendar Process List

Calendar Process List

Field or Control	***Description***
Calendar ID	Select a Calendar ID that defines the time range in which salary costs are being defined.
Period ID	The system enters a Period ID for the salary costs being calculated during this time range.

See *PeopleTools: Process Scheduler*.

Related Links

PeopleSoft Global Payroll
PeopleSoft Global Payroll for France

Defining Training Budget Periods and Department Allocations

To define budget periods, use the Budget Information Table (BUDGET_PERIOD_TBL) component. To allocate budget amounts by department, use the Department Budget (TRN_BUDGET_TBL) component.

These topics provide an overview of budget period and allocations and discuss how to:

- Define budget periods.
- Allocate budgets to departments.

Understanding Budget Periods and Department Allocations

A *budget period* is a period of time for which a training budget is established. Your company's business needs determine the length of the budget period. Typically a budget period covers one year, however, the length may depend on both business requirements and process cycles; the period could be a quarter, a month, or any other duration.

When you define a budget period, you associate it with one or more business units.

After you establish budget periods, you can allocate a budgeted amount to each department. You can then see how the estimated training costs that are based on department training demand compare to a department's allocated training budget.

Pages Used to Set Up Training Budget Periods and Department Allocations

Page Name	*Definition Name*	*Usage*
Budget Information Page	BUDGET_PERIOD_TBL	Define budget periods.
Department Budget Page	TRN_BUDGET_TBL	Define the amount that is allocated to departments in your organization for training in a specified budget period.

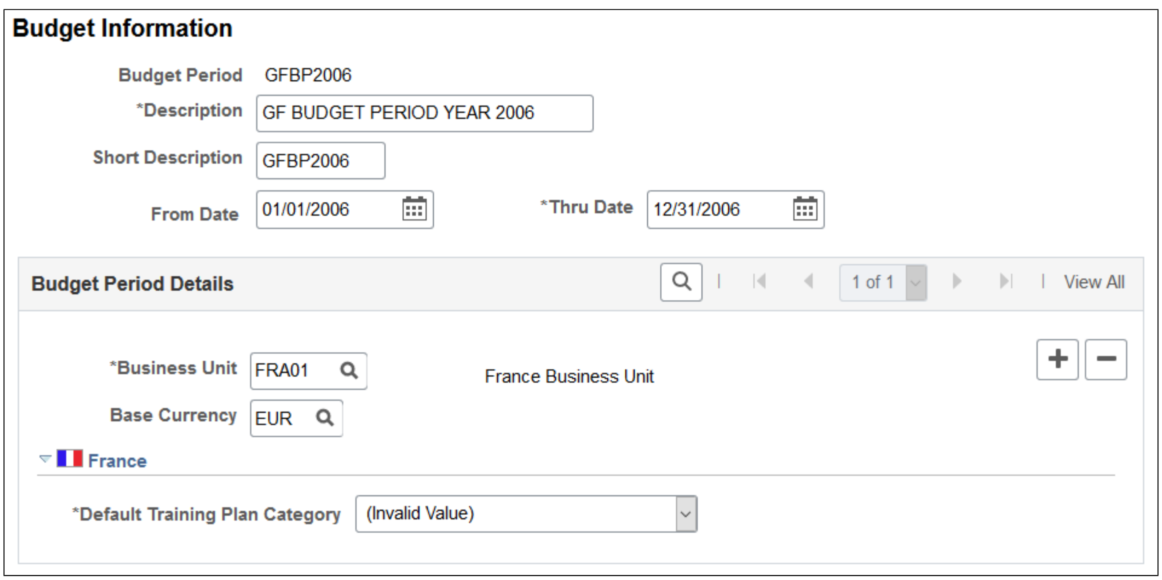
Budget Information Page

Use the Budget Information page (BUDGET_PERIOD_TBL) to define budget periods.

Navigation:

Administer Training > **Define Budget** > **Budget Information** > **Budget Information**

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



You can also specify the base currency for department budgets and training costs. This ensures that you always compare budgets and costs in the same currency.

Field or Control	*Description*
From Date and **Thru Date** (through date)	Enter the begin and ends dates for the budget period. **Important!** Course sessions must fall within the budget period that is to be included in the budget. A course session cannot span two budget periods.

Budget Period Details

Field or Control	***Description***
Business Unit	Select the business units to which the budget period applies. Add as business units by inserting new rows. This enables you to create training budgets for the employees in those business units. When you set up and track budgeting demands, you can use only budget periods that are assigned to an employee's business unit. You associate employees with business units on the Job Data component in Administer Workforce.
Base Currency	Specify the base currency to be used to track all cost amounts.

Field or Control	***Description***
(FRA) Default Training Plan Category	The category that you select here becomes the default training plan category when you create training demands. Values are: *Skill Development, Adaptation to Job Changement, Job Preservation,* and *Not Specified.*

Related Links

Selecting the Base Currency for Training Costs
"Defining Business Units" (Application Fundamentals)

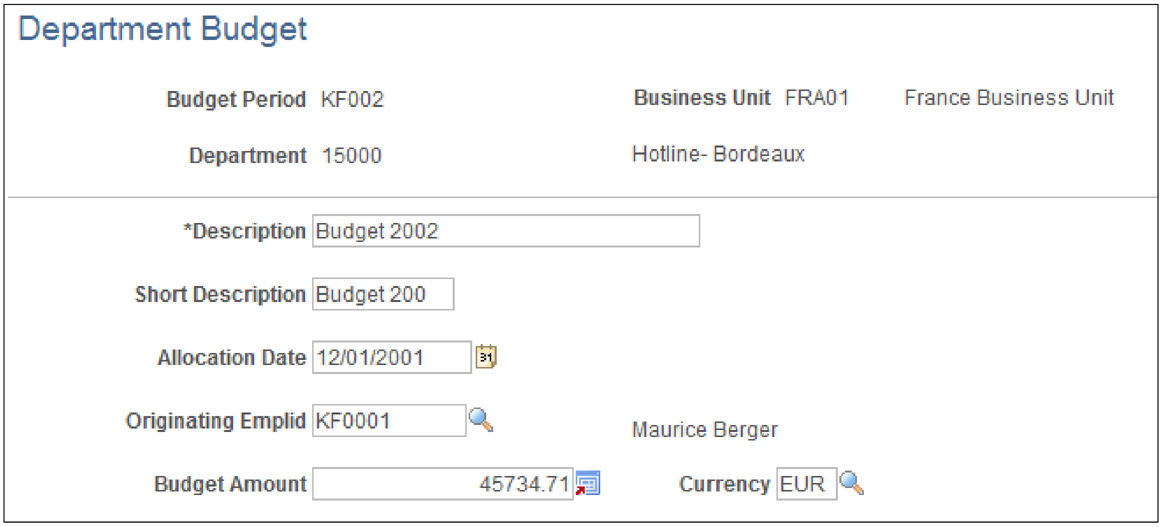
Department Budget Page

Use the Department Budget page (TRN_BUDGET_TBL) to define the amount that is allocated to departments in your organization for training in a specified budget period.

Navigation:

Administer Training > **Define Budget** > **Department Budget** > **Department Budget**

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



Field or Control	Description
Allocation Date	Enter the date that you allocate the budget to the department.
Originating Emplid (originating employee ID)	Select the ID of the person who allocated the budget.
Budget Amount	Enter the budgeted amount and the currency to use when you compare the actual and budget costs by department. The system uses the selected currency as the default value on pages where the Budget Training process calculates department budget costs to ensure that costs and budget are in the same currency.

Related Links

Selecting the Base Currency for Training Costs

Chapter 4

Defining Training Requirements

Understanding Training Demand

These topics list common elements and discuss:

- Training demands and budgets.
- Demand profiles.
- Methods of determining training demand.
- Department trees.

Common Elements Used to Understand Training Demand

Field or Control	***Description***
Creation Date	If you're creating a new department demand, enter the creation date. The default is the system date, which you can change.
Demand ID	The system displays *NEW* when you create a demand for the first time. You can accept the system-generated ID or enter a new ID. The system generates a sequence number based on the last demand ID that was stored in the Installation table.
Demand Priority	Values are *Low, Medium,* and *High.* When you're building global scenarios using the Add Training Global Scenario processes, you can specify that the system include only demands that have a certain demand priority. See Creating Global Scenarios.
Expiration Date	Enter the last possible date for meeting the training demand. This field is for information only, but it can be useful if you decide to mark a demand as obsolete after a specific time.
From Date and **Thru Date**	Displays the beginning (from) and ending (through) dates of the budget period, which you entered when you opened the page.
Frozen	Automatically selected if the budget period is frozen. If you try to modify this page, you get a warning message.

Field or Control	***Description***
OrigEmplID (originating employee ID)	Select the employee ID of the person who created the demand.
Originator	Select the demand originator's position. Values are *Employee* and *Supervisor.*
Revision Date	Enter a revision date to indicate when the demand profile was edited.

Training Demands and Budgets

Creating a realistic training budget requires that you determine how much training to provide to your workforce. When you know the demand for training—how many employees need or want training—you can figure out the cost, compare it to the proposed training budget, and adjust the budget or the number of employees who can take courses.

Methods of Determining Training Demand

Four methods are available for establishing training demand, as shown in the following table:

Demand Method	***Purpose***
General Demand	Define the number of employees to be trained in certain departments and for certain job codes.
Departmental Demand	Define the number of employees to be trained in a specific course for a particular department.
Employee Demand	Define training requirements for individual employees.
Employee Demand by Course	Define the number of employees to be trained in a particular course.

Note: Demand is established for a particular budget period.

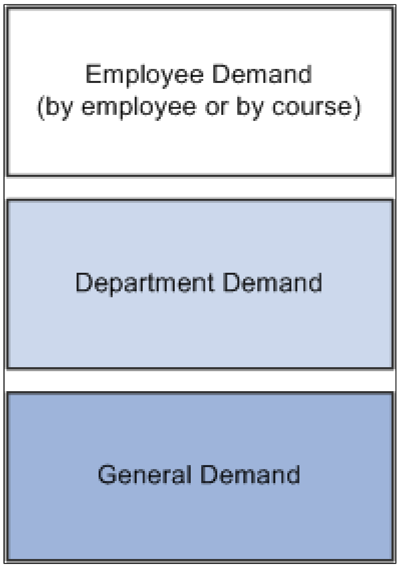
Using these methods, you can:

- Get complete training information, from the training needs of your entire organization to those of the individual employee.
- Establish only one type of demand or one of each type.

  For example, you can define general demands only and not work with departmental or employee demands. You can set up training budget scenarios and develop a training plan using just one method or all four methods. If you work in a decentralized way, departmental- or employee-level demand forecasting works best. If you work in a centralized way, global-level forecasting works best.

- Determine the costs that are associated with a demand for training in a particular course—not just how many employees need the training, but the cost to your organization in terms of wages or lost billable time.

This diagram shows the layers of training needs, with general demand as the foundation layer, department demand at the next level up, and employee demand (by employee or course) at the top level:



For each type of demand, you define:

- Whom to include when the system calculates the training demand for a course.
- The cost of training the employees for the specified demand.

  This cost is either the *average* training cost, if you're working with a general or department demand, or the specific cost per employee, if you're working in the Employee Demand or Employee Demand by Course components.

Demand Profiles

To determine training demand, you build profiles of employees with similar qualities who need to take the same training courses. A demand profile is a template that defines a set of criteria for selecting employees. For example, if managers in your Customer Support department must take the Time Management course, the demand profile would include the Customer Support department and manager job code as selection criteria.

Identifying workers who need training by using competencies is useful because you can include employees with certain competencies and proficiency levels for training in courses that can improve their competency levels and exclude employees who already possess those competencies. You can define selection criteria by inclusion, exclusion, or a combination of both. You can also define multiple criteria statements that the system processes in sequence, to further refine the profile.

Define demand profiles once and use them whenever you check training demand for a new budget period. You can create and maintain as many demand profiles as you need.

Related Links

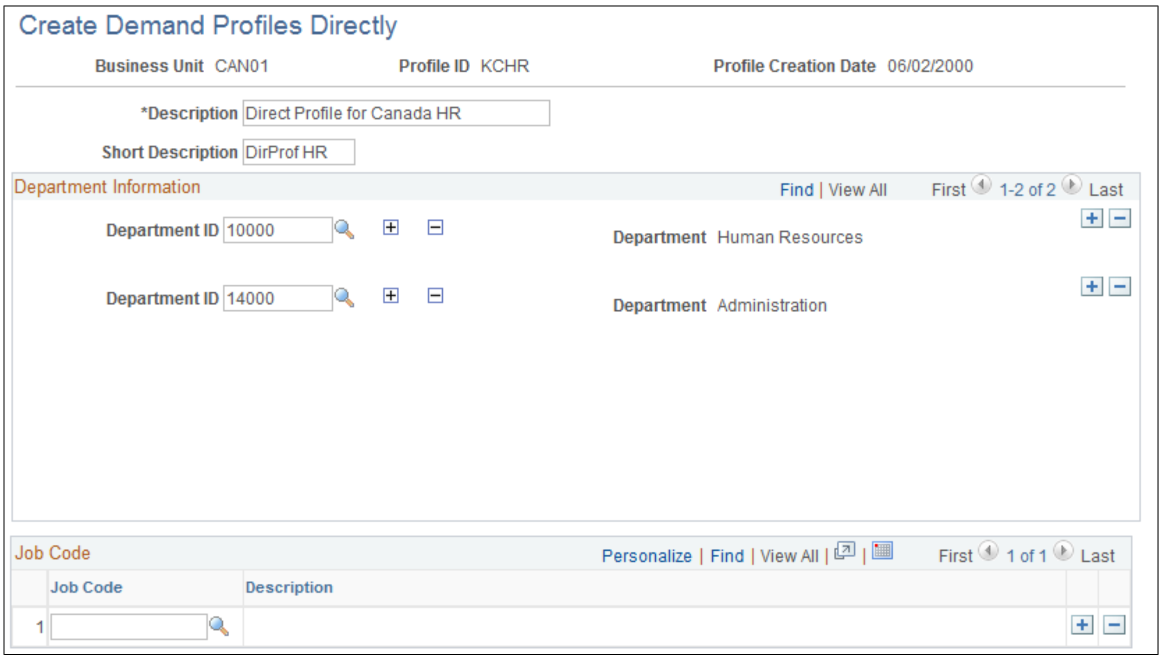
Creating Demand Profiles

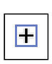
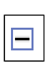
Department Trees

When you use training budget components, such as demand profiles or department demands that reference department information, you can use a department security tree.

You can enter a parent department on the tree and automatically include any child departments in departmental views, profile templates, and training demand definitions, using two tree buttons.

This example shows the Create Demand Profile Directly page where you can access the department tree as you select departments for a demand profile:

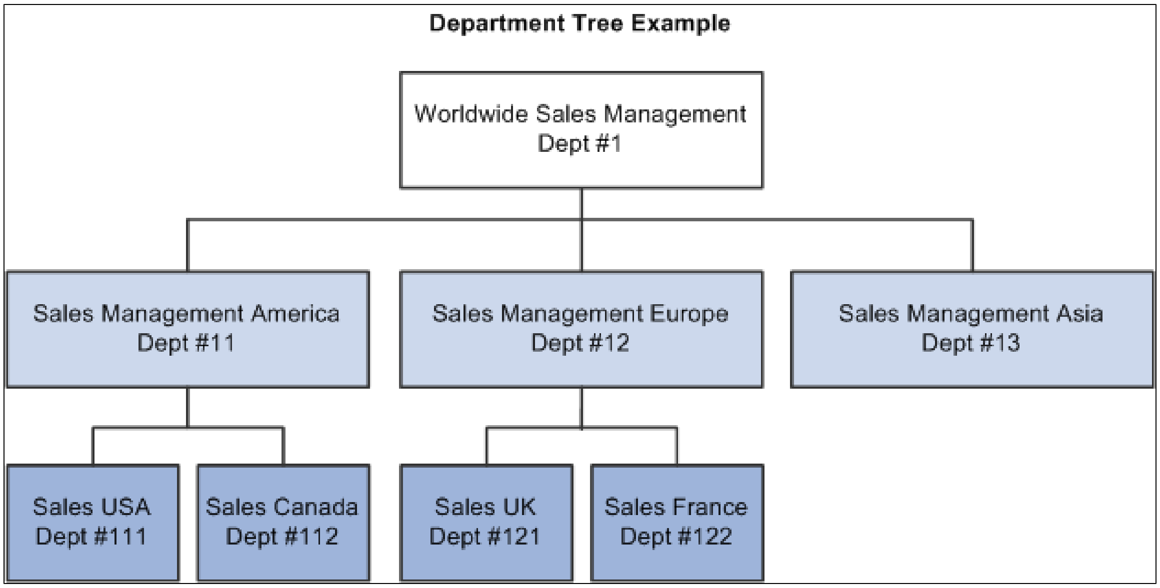


Term	Definition
	Click the **Expand** button to add related departments that are specified in the department tree to the list on the page. Then you can add several departments to the list in one step.
	Click the **Collapse** button to delete related departments from the list. The system deletes only the departments that you added by clicking the **Expand** button. Departments that you added manually remain in the list, even if they are related departments.

Instead of using the **Expand** and **Collapse** buttons, you can enter departments manually by inserting a department row.

For example, when you establish the number of employees that need training for a course, and you want to specify a demand for your own department only, enter only your department number and the number of people who are to be trained. To train people in every department for which you are responsible, enter the department ID for the parent department and click the **Expand** button. The system creates a new data row for each department that is below the parent department, according to the department security tree.

The following diagram illustrates an expanded department tree for a geographically-organized sales organization:



If you don't want to train employees in Sales Management America, Dept #11, remove that department from the department list by clicking the **Collapse** button for that department row. The system deletes any departments that report to the selected department. In the example, if you click the **Collapse** button for Dept #11, the system removes Dept #111 and Dept #112.

Related Links

“Understanding PeopleSoft Security” (Application Fundamentals)

“Understanding Data Permission Security for HCM” (Application Fundamentals)

Creating Demand Profiles

To create demand profiles, use the Directly (TRN_PROFILE_CREATE) and the By Criteria (TRN_PROFILE_TABLE) components.

These topics provide an overview of dynamic and static demand profiles and discuss how to:

- Create dynamic profiles.
- Create static profiles.
- View selection results.
- Run the process to create demand profiles.

Understanding Dynamic and Static Demand Profiles

Use demand profiles to define employee selection criteria for group demands. This demand profile becomes a template that you can reuse as you reassess training demands.

You can build demand profiles using one of two methods—dynamic or static:

- Dynamic

  If every employee in a particular department with a particular job code should enroll in a training program, then use the Create Demand Profile Directly page to create a dynamic profile template. As departments change and employees move into different jobs, their profile population changes, too.

- Static

  If some employees don't fit the department or job code criteria, then use the Profile by Criteria page. For example, to search for employees in a particular department and job code with certain competencies, use the Profile by Criteria page to create a static profile template.

Pages Used to Set Up Demand Profiles

Page Name	***Definition Name***	***Usage***
Create Demand Profiles Directly Page	TRN_PROFILE_CREATE	Create a dynamic profile based on a list of department and job codes.
Profile Criteria Page	TRN_PROFILE_TABLE	Create a static profile by defining criteria that includes or excludes employees in training plans. To include competencies in the selection criteria, set up competency codes in the Content Catalog.
Profile Selection Page	TRN_PROFILE_VIEW	View the number of employees selected by department and job codes according to the criteria on the Profile by Criteria - Profile Criteria page.
Create Delayed Profile Page	RUNCTL_TRN009	Run the process that creates the demand profile, based on the selection criteria that you set up on the Profile By Criteria - Profile Criteria page. Run this process only if you selected the Delayed check box on the Profile Criteria page.

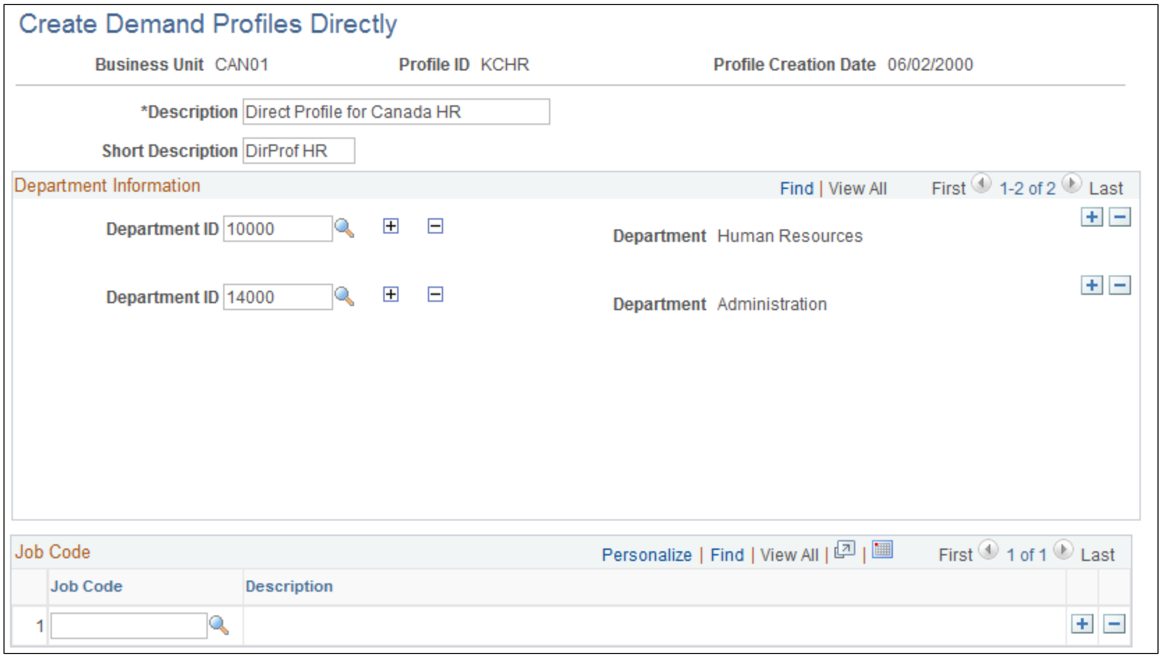
Create Demand Profiles Directly Page

Use the Create Demand Profiles Directly page (TRN_PROFILE_CREATE) to create a dynamic profile based on a list of department and job codes.

Navigation:

Administer Training > Training Budget > Create Demand Profiles > Directly > Create Demand Profiles Directly

This example illustrates the fields and controls on the Create Demand Profile Directly page. You can find definitions for the fields and controls later on this page.



By creating a list of departments and job codes, you identify the positions with training needs. You can save this profile as a template and use it for future budget periods. Whenever you reference this profile template to establish the training demand for a course, the system includes all employees who fit this profile.

Note: While the profile always gathers the employees in these departments and jobs, remember that the number of employees changes over time as the department head count changes and as employees change job codes.

Department Information

Field or Control	***Description***
Department ID	Select the department to include in the training profile template.

Job Code

Field or Control	***Description***
Job Code	For the departments that you specified, select the job codes that have training requirements.

Related Links

Department Trees

Profile Criteria Page

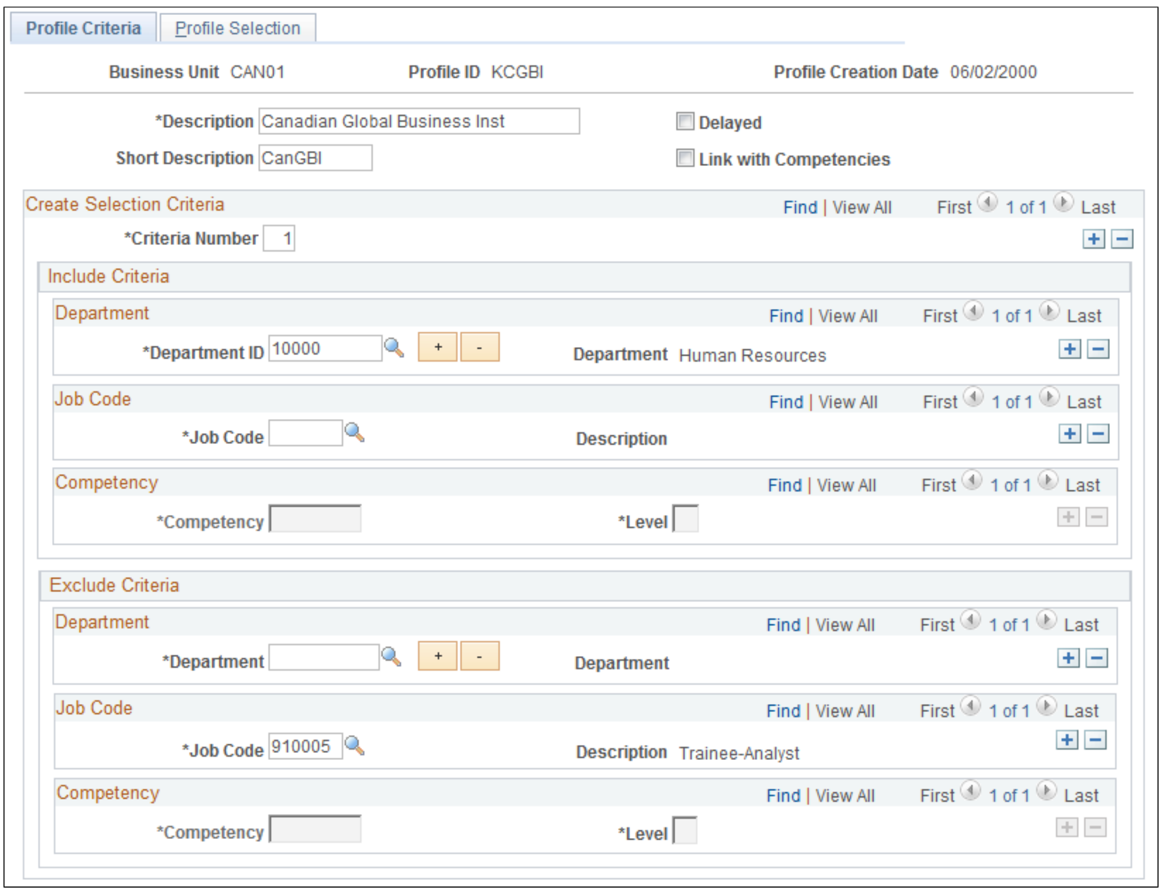
Use the Profile Criteria page (TRN_PROFILE_TABLE) to create a static profile by defining criteria that includes or excludes employees in training plans.

To include competencies in the selection criteria, set up competency codes in the Content Catalog.

Navigation:

Administer Training > **Training Budget** > **Create Demand Profiles** > **By Criteria** > **Profile Criteria**

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



You can use this profile as a template to obtain a list of employees who match the selection criteria. You can run the profile repeatedly during the current or next budget period.

Note: Save the contents of this page and execute the profile process to view the selection results on the Profile Selection page.

Field or Control	***Description***
Description	The system displays the description that you enter here on any pages or reports that reference this profile ID, so the description should identify what this profile does.
Delayed	Select to delay processing the demand profile until later. If this check box is deselected, the system executes the profile criteria when you save the page. Before starting to gather the employees who match the profile template, the system displays a message about the process. Depending on your requirements, this profiling could take some time, so you might consider postponing it. If you postpone this process, you can perform it later by running the Create Delayed Profile process.
Link with Competencies	Select to include competencies in the selection criteria. When selected, the system makes the **Competency** fields available and enables the competency search criteria. To include competencies in the selection criteria, set up competency codes in the Content Catalog.

Create Selection Criteria

In this group box, you build the employee training profile template using one or more selection criteria statements that you organize by criteria number.

Field or Control	***Description***
Criteria Number	The system processes the selection criteria statement-based criteria numbers, starting at *1* and moving sequentially through the statement list. When you define a new profile, the system sets the criteria number to *1,* to indicate the first criteria statement. Enter a new criteria number to define an additional profile criteria statement. **Note:** If you write several sequentially numbered criteria statements, you can reorganize them by setting the number for each statement and then saving the page. The system sorts the statements and displays them according to the criteria number.

Include Criteria and Exclude Criteria

Field or Control	***Description***
Department ID	Select the department to include in or exclude from the profile.
Job Code	Select the job code to include in or exclude from the profile.
Competency and **Level**	Select the competency to include in or exclude from the profile. Select a competency rating in the **Level** field. When you complete the competency fields, the system includes or excludes workers with competencies at the rating that you specified. You define competency codes in the Content Catalog and the associated rating levels on the Rating Model table.

To include both the department that you specify and its child departments in the department tree, use the **Expand** or **Collapse** buttons.

Related Links

"Understanding the Content Catalog" (PeopleSoft Human Resources Manage Profiles)

Department Trees

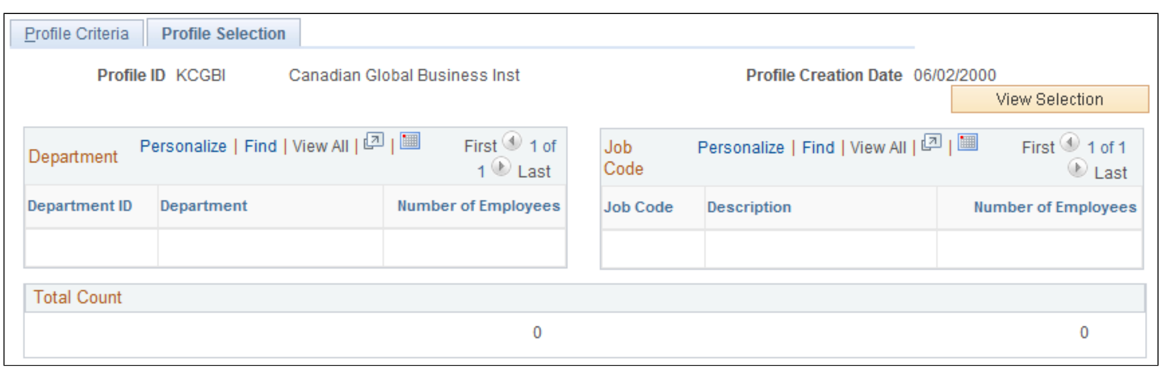
Profile Selection Page

Use the Profile Selection page (TRN_PROFILE_VIEW) to view the number of employees selected by department and job codes according to the criteria on the Profile by Criteria - Profile Criteria page.

Navigation:

Administer Training > **Training Budget** > **Create Demand Profiles** > **By Criteria** > **Profile Selection**

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



Use this page to determine the effectiveness of the profile criteria selection statements. If your resulting employee count is too high or too low, go back to the Profile Criteria page, make any necessary changes to the selection criteria for this profile ID, rerun the process, and return to this page to evaluate the results.

Field or Control	Description
Profile Creation Date	Displays the date that the system last processed this profile ID. When you rerun the process, the system updates this field.
View Selection	The View Selection button triggers an App Engine process to run that creates non-delayed training profiles based on the criteria entered on the Profile Criteria page.

Department

Field or Control	Description
Number of Employees	Displays the number of employees that match department profile criteria. If you entered more than one department in the selection criteria, then the system displays the number of matching employees for each department code.

Job Code

Field or Control	Description
Number of Employees	Displays the number of employees that match job profile criteria. If you entered more than one job code in the selection criteria, then the system displays the number of matching employees for each job code.

Total Count

Displays the total number of employees that match profile criteria for this profile ID.

Create Delayed Profile Page

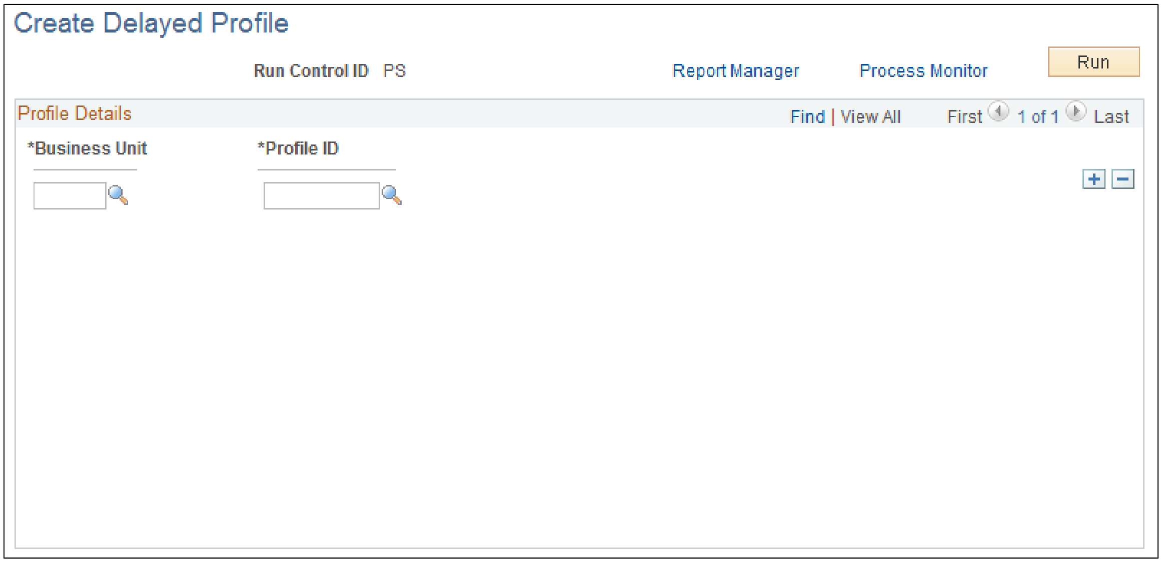
Use the Create Delayed Profile page (RUNCTL_TRN009) to run the process that creates the demand profile, based on the selection criteria that you set up on the Profile By Criteria - Profile Criteria page.

Run this process only if you selected the Delayed check box on the Profile Criteria page.

Navigation:

Administer Training > **Training Budget** > **Create Demand Profiles** > **Create Delayed Profile** > **Create Delayed Profile**

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



Field or Control	***Description***
Profile ID	Select the profile ID from the list of demand profiles that you created on the Profile Criteria page.
Run	Click to run the Create Delayed Profile process.

Defining General Demands

To define general (global) demands, use the General Demand (TRN_DEMAND_TABLE) component.

These topics discuss how to:

- Define training needs.
- Specify the group that needs training.
- Specify a demand profile.
- Enter country-specific information for a general demand.

Pages Used to Define General Training Demands

Page Name	***Definition Name***	***Usage***
General Demand Page	TRN_DEMAND_GNRL_1	View course details and general information about the demand, including priority and originator. To use this page, you must first set up budget periods on the Budget Information page.
General Demand - Training Population Page	TRN_DEMAND_GNRL_2	Define the group of people who need training in the course that you selected on the General Demand page. You must set up employee training costs and budgets before you can set up training demands.
General Demand - Profile Template Page	TRN_PROF_TMPLT_SEC	Specify the profile to use to populate the General Demand page.
Gender/Socio Prof Distribution Page	TRN_DPT_DMD_SEC	Enter country-specific information for the general demand that you have set up on the Training Population page.

General Demand Page

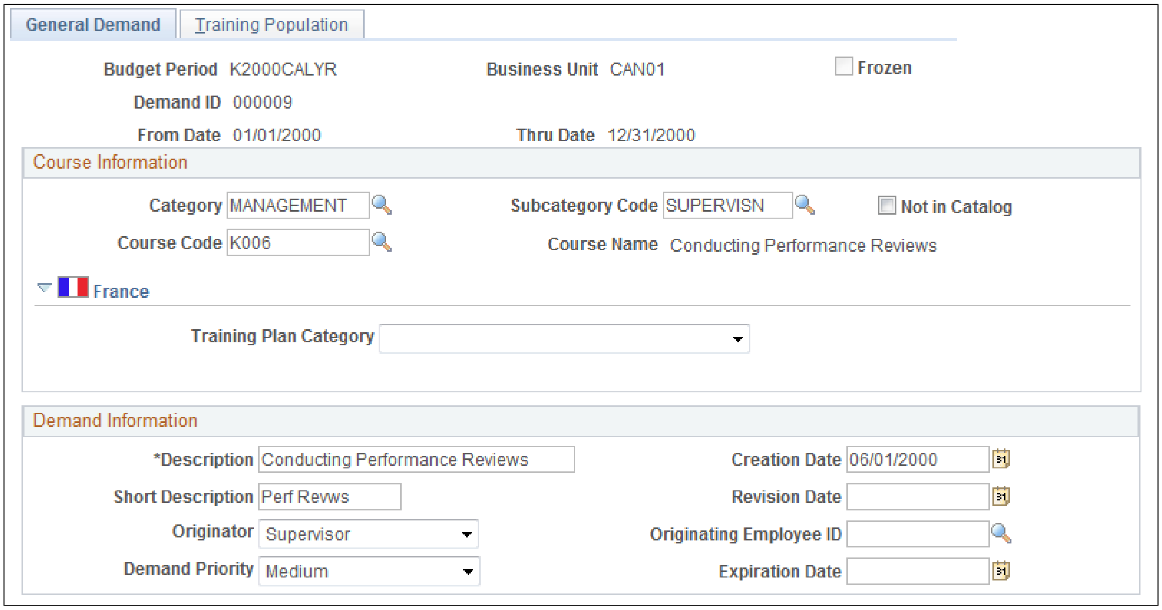
Use the General Demand page (TRN_DEMAND_GNRL_1) to view course details and general information about the demand, including priority and originator.

To use this page, you must first set up budget periods on the Budget Information page.

Navigation:

Administer Training > **Training Budget** > **Identify Training Demand** > **General Demand** > **General Demand**

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



Course Information

Field or Control	***Description***
Category, Subcategory, and **Course Code**	Specify the course for this training demand by selecting a category, subcategory, and course code. If you don't know what value to use, use the system default *UNKNOWN.* **Note:** You must select a category before you can select a subcategory.
Not in Catalog	Select if the training course isn't defined in the Catalog table.

France

Field or Control	***Description***
(FRA) Training Plan Category	Select a training plan category. The values are: *Skill Development, Adaptation to Job Changement, Job Preservation,* and *Not Specified.*

Demand Information

Field or Control	***Description***
Description and **Short Description**	The system populates these fields after you enter the category, subcategory, and course code. The description information appears whenever the demand ID is referenced on a page or report.

Related Links

Creating Global Scenarios

Freezing Budgets, Moving Unapproved Demands, and Deleting Scenarios

General Demand - Training Population Page

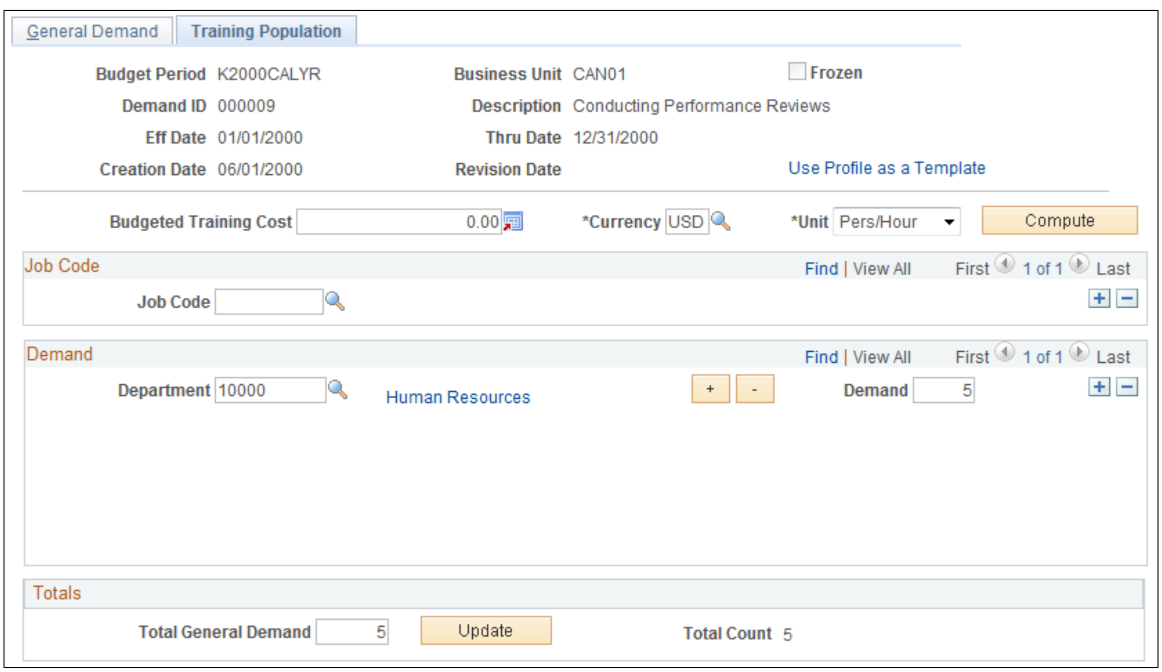
Use the General Demand - Training Population page (TRN_DEMAND_GNRL_2) to define the group of people who need training in the course that you selected on the General Demand page.

You must set up employee training costs and budgets before you can set up training demands.

Navigation:

Administer Training > **Training Budget** > **Identify Training Demand** > **General Demand** > **Training Population**

This example illustrates the fields and controls on the General Demand - Training Population page. You can find definitions for the fields and controls later on this page.



Establish the total general demand amount and provide additional parameters to calculate the average cost for training employees for this demand. The calculation here determines the employee cost of training and doesn't include the course costs themselves, such as instructor fees and facility costs.

Field or Control	***Description***
Use Profile as a Template	Click to import the job codes and departments that you previously set up in a demand profile. The system displays the page where you select the profile. If you don't enter any job codes or department information on this page, then the calculation is based solely on the profile that you specified.
Budgeted Training Cost	This represents the average cost of training the selected population. The system calculates the value when you click the **Compute** button, using the jobs that are associated with the specified job codes on the Job Code Salary Costs page. The calculation looks like this: Employee Training Budgeted Cost = (job code training cost × number of people in this job code) for all job codes in the Job Code field on this page / total number of people in the general demand. **Note:** Specify the default currency for business units for a budget period on the Budget Information table. Budgets are automatically converted to the default base currency that you establish on the Training Base Currency table. The system converts all training costs to the base currency to calculate training costs.
Unit	The system displays the cost unit that is associated with the amount in the **Empl. Training Budgeted Cost** field.

Job Code

Specify the job codes that are included this training demand. When the system calculates the training demand, only employees with the selected job code are considered. The system also uses this job code information to calculate the average cost to train employees for this demand.

Demand

Field or Control	***Description***
Department	Select the department to include for calculating the demand for this course. To enter country-specific information, click the department name link next to this field.

Field or Control	*Description*
Demand	Enter the number of the employees to be trained for each of the departments selected. This field is optional, but the more precise the information that you provide, the more realistic the subsequent simulation and pricing becomes. ***Warning!*** If you don't enter a demand amount, the computed costs throughout the Budget Training business process will be incorrect. All computed costs are based on these demand amounts.

Totals

Field or Control	*Description*
Total General Demand	Required for each population demand. The system uses this number to calculate the average cost of training employees for this demand.
Update	Click the **Update** button to move the sum of the individual department demands to the **Total General Demand** field. If you change the **Demand** fields, click this button to update the total general demand before you save the page.

Related Links

Department Trees

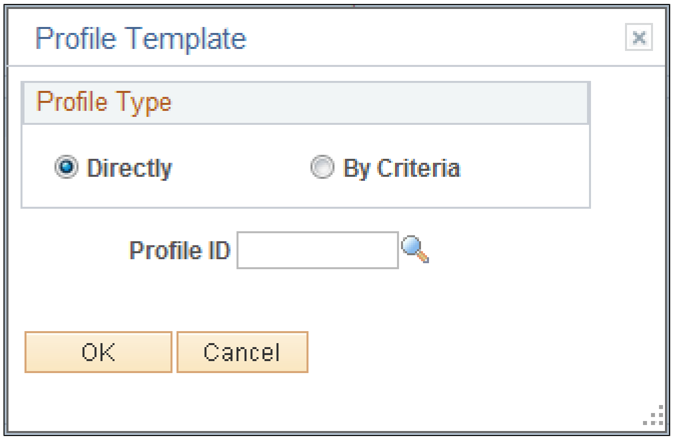
General Demand - Profile Template Page

Use the General Demand - Profile Template page (TRN_PROF_TMPLT_SEC) to specify the profile to use to populate the General Demand page.

Navigation:

Click the **Use Profile as a Template** link on the General Demand - Training Population page.

This example illustrates the fields and controls on the General Demand - Profile Template page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Directly	Use this option to select a profile that you created using the Create Demand Profile Directly page.
By Criteria	Use this option to select a demand profile that you created using the Profile by Criteria page. This method is particularly useful for determining which people in your organization need to be trained based on a set of criteria.
Profile ID	Select the demand profile to apply.

When you click OK, the system calculates the training cost using the job codes list selected in the specified profile and the number of people selected for each job code. The system displays the average training cost for the profile population in the **Budgeted Training Cost** field on the General Demand page.

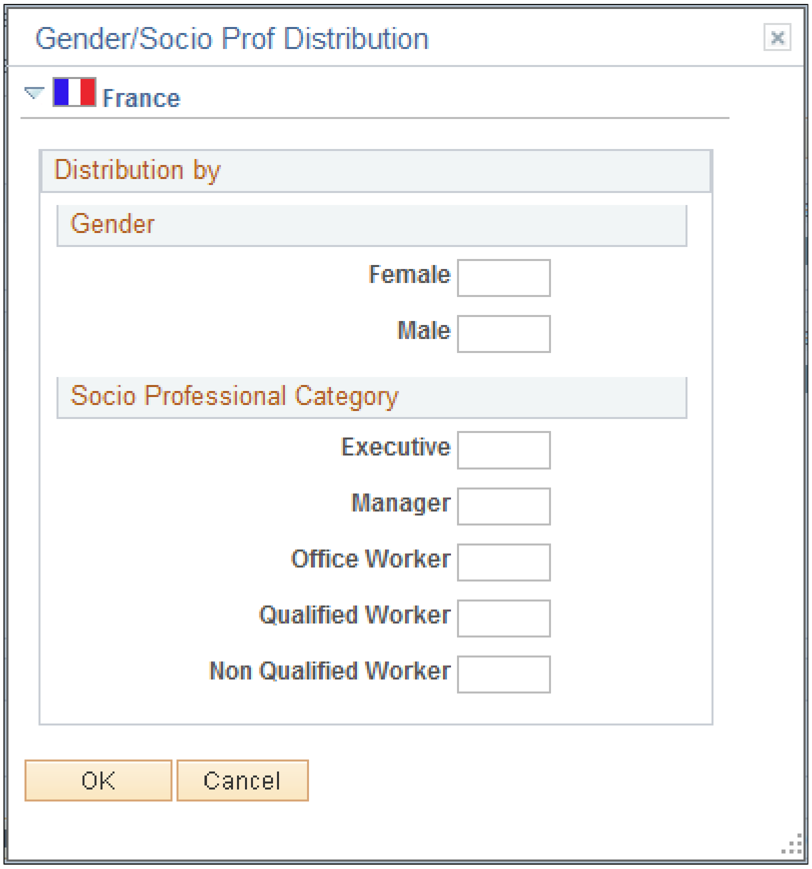
Gender/Socio Prof Distribution Page

Use the Gender/Socio Prof Distribution page (TRN_DPT_DMD_SEC) to enter country-specific information for the general demand that you have set up on the Training Population page.

Navigation:

Click the department name link in the Demand section of the General Demand - Training Population page.

This example illustrates the fields and controls on the Gender/Socio Prof Distribution page. You can find definitions for the fields and controls later on this page.



(FRA) France

Define how your training demand divides by gender and professional category. The sums of the entries in the two regions on this page must equal the total general demand that you specified on the Training Population page.

Gender

Enter the number of female and male employees who make up the demand shown on the Training Population page.

Socio Professional Category

In the field for each category, enter the number of employees who make up the demand for that category on the Training Population page.

Defining Departmental Training Demands

To define departmental demand, use the Department Demand (TRN_DEMAND_DEPT) component.

This topic discusses how to define the number of employees in a department.

Pages Used to Define Departmental Training Demands

Page Name	***Definition Name***	***Usage***
Department Demand Page	TRN_DEMAND_DEPT	Define the number of employees to be trained in a specific course or set of courses for a particular department during a specified budget period. Set up training costs and budgets before setting up department demands.
Department Demand - Country	TRN_DPT_DMD_SEC1	Click the **Demand ID** link on the Department Demand page. Enter country-specific information for the department demand. The Department Demand - Country page is identical to the Gender/Socio Prof Distribution page.

Department Demand Page

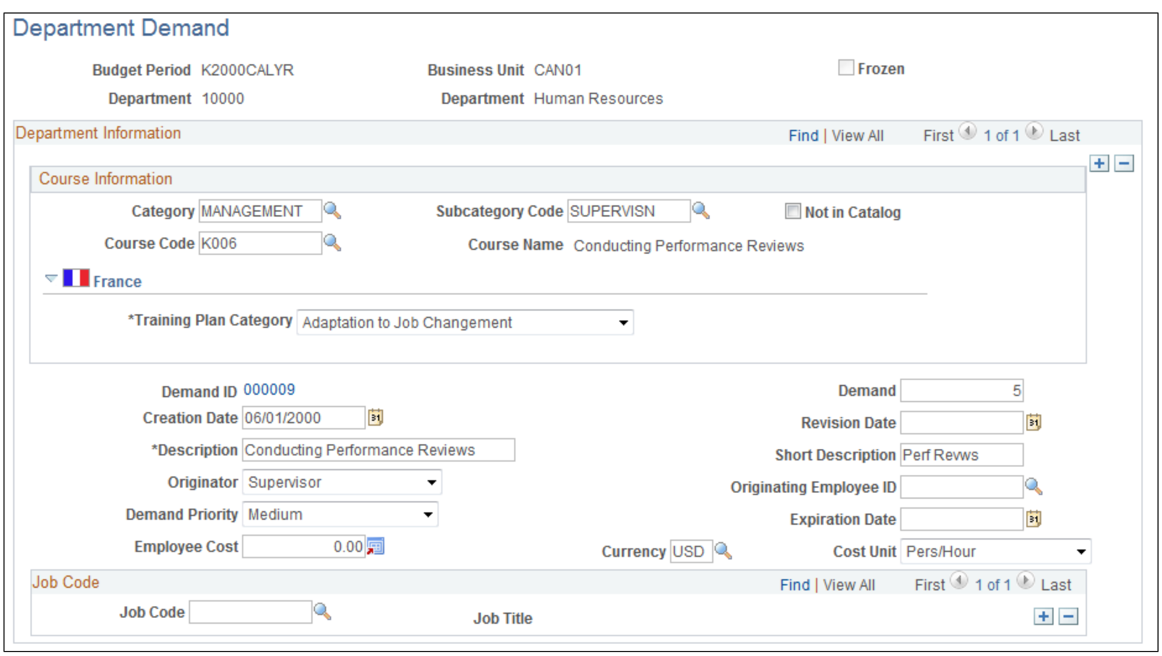
Use the Department Demand page (TRN_DEMAND_DEPT) to define the number of employees to be trained in a specific course or set of courses for a particular department during a specified budget period.

Set up training costs and budgets before setting up department demands.

Navigation:

Administer Training > **Training Budget** > **Identify Training Demand** > **Department Demand** > **Department Demand**

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



Course Information

Specify the course for this training demand. If you don't know the category, subcategory, or course code, use the system default *UNKNOWN*. To add another course, insert an additional data row.

Field or Control	***Description***
Not in Catalog	Select if the training course isn't defined in the Catalog table.
(FRA) Training Plan Category	Select a training plan category. The values are: **Skill Development, Adaptation to Job Changement, Job Preservation, Not Specified.**
Demand	Enter the number of employees in the selected department that need to take the training course.
Employee Cost	Enter the employee training cost and the currency it is tracked in. This cost is used during the simulation for pricing the scenarios and the training plan. You specify the default currency for business units for a budget period on the Budget Information page. Budgets are automatically converted to the default base currency that you establish on the Base Currency page.
Cost Unit	Select the cost unit that is associated with the amount in the **Employee Cost** field.

Job Code

Field or Control	***Description***
Job Code	Before calculating employee cost, you can select one or more job codes to use when calculating the average employee cost for training for this demand. When you select job codes here, the system uses the Job Code Training Cost amount on the Job Code Training Cost table to calculate the employee training cost. The system takes an average of the costs for all job codes that you specify.

Related Links

Creating Global Scenarios

Defining Employee Training Demands and Demand by Course

These topics discuss how to define employee training demand.

Pages Used to Define Employee Training Demand and Demand by Course

Page Name	***Definition Name***	***Usage***
Employee Demand - Employee Demand Profile Page	TRN_DEMAND_EE_1	Enter the courses that the selected employee requires during the budget period set up on the Budget Information page. Enter audit information for the demand.
Employee Demand - Demand Details Page	TRN_DEMAND_EE_2	Enter additional employee demand details, including job code, department, and training costs.
Employee Demand by Course Page	TRN_DEMAND_EECRS_1	Define the employees who require the selected training course and enter audit information for the demand.
Employee Demand by Course - Demand by Course Details Page	TRN_DEMAND_EECRS_2	Enter additional employee details by course. For example, an employee will transfer to another department or job code during the budget period, and the training need should be allotted to the new department, then you can account for that change here.

Employee Demand - Employee Demand Profile Page

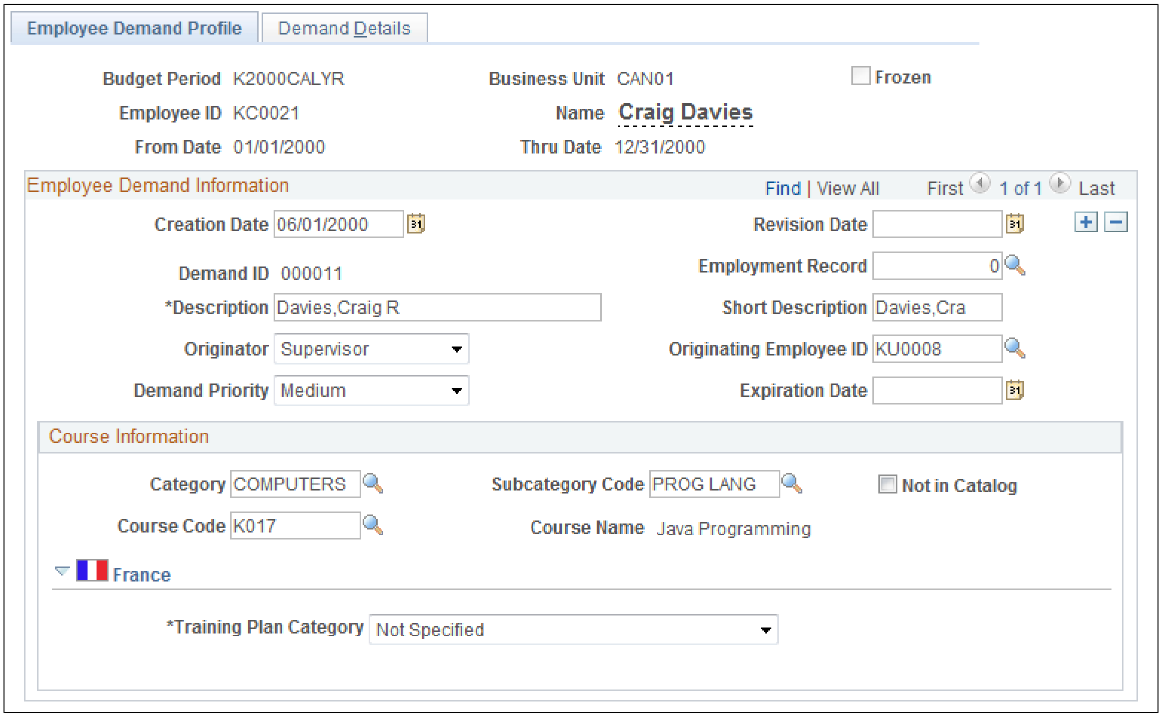
Use the Employee Demand - Employee Demand Profile page (TRN_DEMAND_EE_1) to enter the courses that the selected employee requires during the budget period set up on the Budget Information page.

Enter audit information for the demand.

Navigation:

Administer Training > **Training Budget** > **Identify Training Demand** > **Employee Demand** > **Employee Demand Profile**

This example illustrates the fields and controls on the Employee Demand - Employee Demand Profile page. You can find definitions for the fields and controls later on this page.



Specify the course that this training demand applies to. When you first enter this page, the course information values are *UNKNOWN*.

To enter additional courses that this employee needs to take during the specified budget period, place the cursor in the **Category** field and insert new rows.

Course Information

Field or Control	*Description*
Category, Subcategory Code Course Code	If you aren't sure which course this demand is for, select the category and subcategory codes and leave the course code blank. **Note:** You cannot select a subcategory until you've selected a category.
Not in Catalog	Select if the training course isn't defined in the Catalog table.

(FRA) France

Field or Control	*Description*
(FRA) Training Plan Category	Select a training plan category. The values are: *Skill Development, Adaptation to Job Changement, Job Preservation, Not Specified.*

Related Links

Creating Global Scenarios

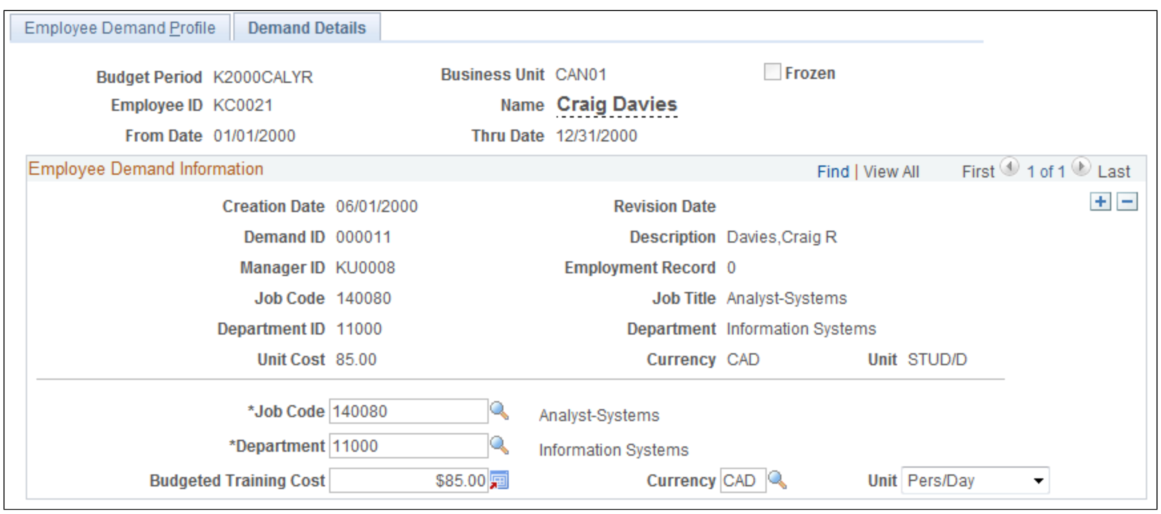
Employee Demand - Demand Details Page

Use the Employee Demand - Demand Details page (TRN_DEMAND_EE_2) to enter additional employee demand details, including job code, department, and training costs.

Navigation:

Administer Training > **Training Budget** > **Identify Training Demand** > **Employee Demand** > **Demand Details**

This example illustrates the fields and controls on the Employee Demand - Demand Details page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Job Code, Department, and **Budgeted Training Cost**	The system populates these fields from the employee's job data. For budget purposes, you can select a job code, department, or employee training budgeted cost if it is different from the values that are currently defined for this employee. You might do this if the employee details will be different in the future period. For example, the employee may be transferring to another department and job with a different employee training budgeted cost. For employee training budgeted cost, indicate the currency that the cost is tracked in. You specify the default currency for business units for a budget period on the Budget Information table. Budgets are automatically converted to the default base currency that you establish on the Training Exchange Rate table (TRN_BASE_CURRENCY).
Unit	Select the cost unit for the value in the **Empl. Training Budgeted Cost** field. This is the cost to train the employee with respect to the employee's wages. Values are: Select the cost unit for the cost that you entered in the *Per Unit Cost* fields. The Compute Student Cost process uses the **Cost Unit** field to divide the cost against the students' training session. Values are: *Flat Cost:* The cost is a fixed rate, it is not dependent on the course session duration. *Pers/Day:* The cost is based on what the employee earns in a day. *Pers/Hour:* The cost is the employee's hourly wage. *Pers/Month:* The cost is the employee's monthly wage. *Pers/Train:* The cost unit may be useful to enter a cost that is not converted by the computation process. The **Paid Hours** field is non applicable and disabled when this cost unit is selected. *Pers/Week:* The cost is the employee's weekly wage. *Pers/Year:* The cost is the employee's yearly wage.

Related Links

Selecting the Base Currency for Training Costs

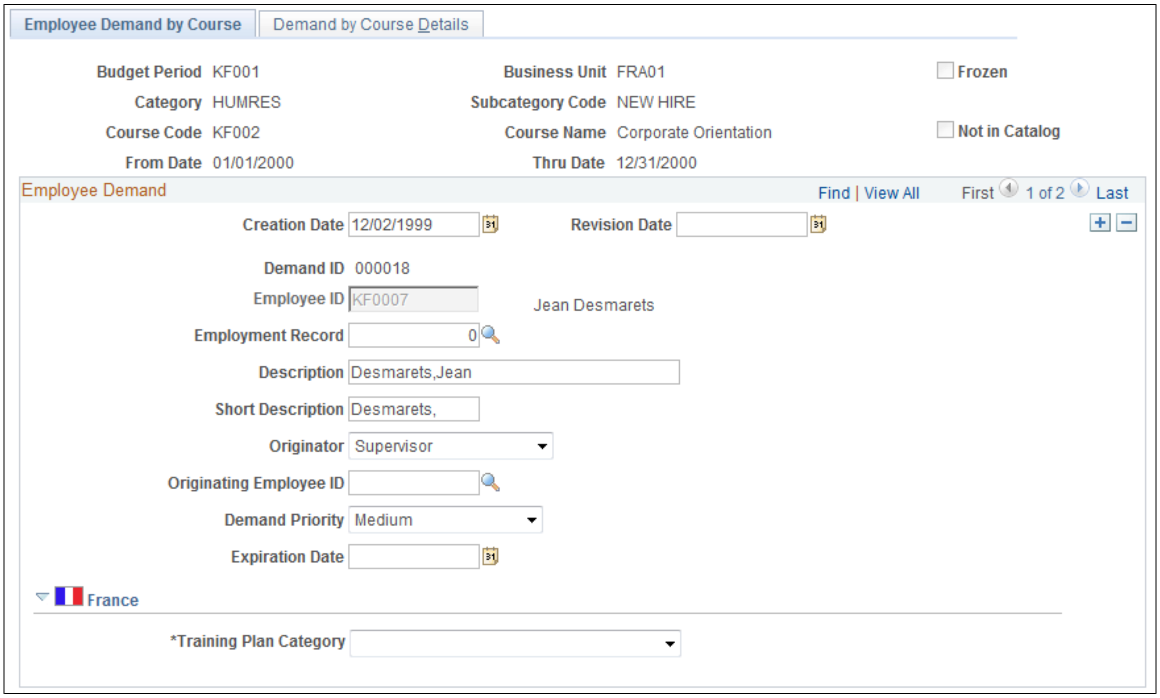
Employee Demand by Course Page

Use the Employee Demand by Course page (TRN_DEMAND_EECRS_1) to define the employees who require the selected training course and enter audit information for the demand.

Navigation:

Administer Training > Training Budget > Identify Training Demand > Employee Demand by Course > Employee Demand by Course

This example illustrates the fields and controls on the Employee Demand by Course page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Not in Catalog	Selected by default if the training course hasn't been defined in the Catalog table.
Employee ID	Insert a row for each employee who needs to attend the course. Employees can come from any department that is associated with the specified business unit.

Employee Demand by Course - Demand by Course Details Page

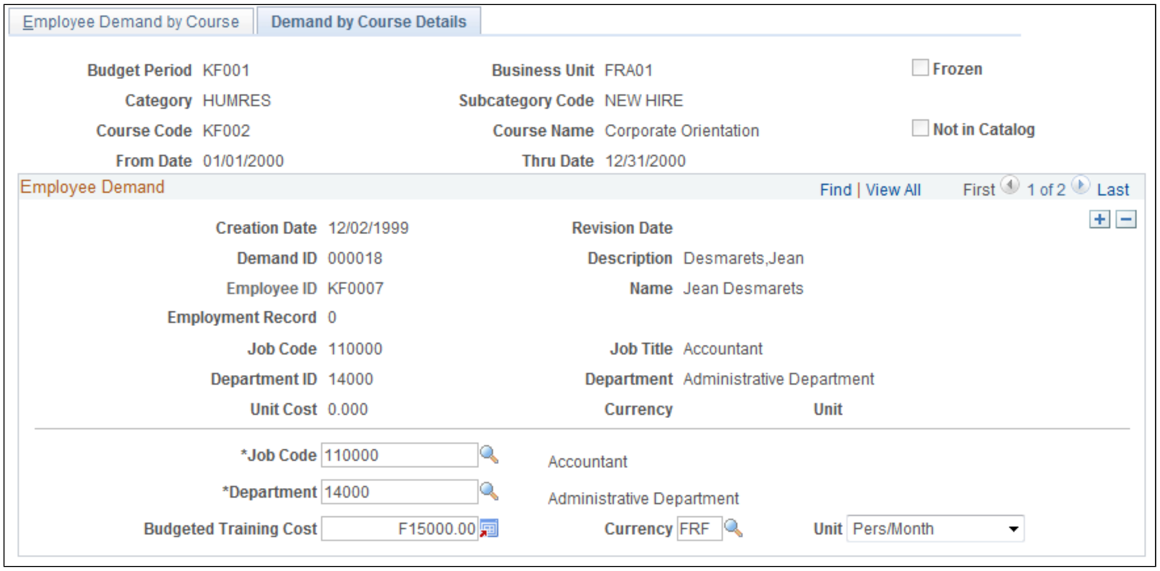
Use the Employee Demand by Course - Demand by Course Details page (TRN_DEMAND_EECRS_2) to enter additional employee details by course.

For example, an employee will transfer to another department or job code during the budget period, and the training need should be allotted to the new department, then you can account for that change here.

Navigation:

Administer Training > Training Budget > Identify Training Demand > Employee Demand by Course > Demand by Course Details

This example illustrates the fields and controls on the Employee Demand by Course - Demand by Course Details page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Job Code and **Department**	You can select a different job code or department for this employee for this training demand and budget period. You might do this if the employee's details will be different in a future budget period; for example, the employee is transferring to another department and job during the budget period, resulting in a different budgeted cost for employee training.
Unit	Select the cost unit for the cost that you entered in the *Per Unit Cost* fields. The Compute Student Cost process uses the **Cost Unit** field to divide the cost against the students' training session. Values are: • *Flat Cost:* The cost is a fixed rate, it is not dependent on the course session duration. • *Pers/Day:* The cost is based on what the employee earns in a day. • *Pers/Hour:* The cost is the employee's hourly wage. • *Pers/Month:* The cost is the employee's monthly wage. • *Pers/Train:* The cost unit may be useful to enter a cost that is not converted by the computation process. The **Paid Hours** field is non applicable and disabled when this cost unit is selected. • *Pers/Week:* The cost is the employee's weekly wage. • *Pers/Year:* The cost is the employee's yearly wage.

Related Links

The Scenario Process

Chapter 5

Planning Training Budgets

Understanding the Training Budget Planning Process

These topics list common elements and discuss:

- Budget scenarios
- The scenario process

Common Elements Used to Plan Training Budgets

Field or Control	***Description***
Active New Scenario	Select to make the scenario active. **Note:** Only one scenario can be active for each budget period and business unit, though you can have multiple scenarios.
New Scenario	Enter the name of the new scenario. The name can be up to ten characters.
Not in Catalog	Select if the course isn't in the Catalog table.
Sort by	To change the order in which information is listed, select one of these values: *Demand:* Sorts demands by the number of requested demands. *Approved:* Sorts demands according to the number entered in the Approved field.

Budget Scenarios

Once you know how many employees need to take each training course, you can determine the total cost of those demands. Then you can compare the cost of the training demand to the proposed departmental training budget.

You can use the scenarios that are provided in PeopleSoft HR to help plan budgets, approve demands, and track and freeze budgets. You can define multiple scenarios.

Using budget scenarios, you can:

- Set the level of employee demand that you can afford during a budget period.

- Perform what-if analyses to determine the best budget plan.
- Simulate the effect of one plan against another.
- Activate the plan that best meets training demands and budgets.

  This plan defines the training plan for the related period.

The Scenario Process

Human Resources compiles corporate, departmental, and employee training demand to determine overall training needs. It uses this data to build an initial scenario the first time that you use the Adjust Department Demand component. This scenario is active, and the system loads the demands that are associated with it into a training plan.

You can adjust your organization's training demands to create a demand profile for each scenario.

Department and Global Scenarios

You create new scenarios by starting from an active scenario at the department level or by combining all active department scenarios into a global scenario for your organization. This provides an overview of training demand, costs, and budget.

Using department-level scenarios works best for large organizations with separate budgets for each department. More centralized or smaller organizations may find that global scenarios are more efficient.

You can narrow the scope of the training demand that the system includes in the training plan, either at each department level or at the global level.

Freezing Scenarios

You can evaluate the training plan through successive iterations of simulation by business unit, creating and activating new scenarios to see how they affect the training plan. Once you decide on the right combination of demand and money, you can freeze the final budget scenario to end the evaluation process for the budget period and establish the training budget.

Training Element Costs

When you define an expense that is associated with a training element (such as a vendor, a facility, or an instructor), you specify the amount, the currency (which is controlled by associated business unit), and a cost unit type, such as per day or per hour. These costs are stored on the following tables:

- TRN_PROV_COST (Provider costs).
- TRN_FACIL_COST (Facility costs).
- TRN_EQUIP_COST (Equipment costs).
- TRN_INSTRC_COST (Instructor costs).
- TRN_EXPNS_COST (Expense costs).
- TRN_CST_ELEMENT (Cost Element Table).

The training element costs are then associated with a course or a catalog element that specifies the duration, in hours, days, or weeks, and so on, for a course. The catalog element also specifies the maximum number of students who can enroll in the course.

When you enter a course cost, the system calculates the cost by element for that course and stores the cost on the Cost Element table. These amounts are ready to use in the Adjust Department Demand component. The system also converts the cost to the base currency that is specified for the business unit in the Budget Information table.

Sessions and cost units affect the computed cost calculation through the session padding factor.

Session Padding Determines Session Demand

When you define course and catalog costs, you enter a cost unit for each per unit cost. The cost unit specifies how the cost is computed. Cost units can be categorized into four groups:

- Cost for one session, such as Flat Cost.
- Duration-dependent cost, such as Hours.
- Student-dependent cost, such as Student/Training.
- Duration- and student-dependent cost, such as Student/Hours.

While cost and duration aren't student-dependent, the number of course sessions to accommodate the estimated training needs must be included in the cost formula. The system needs the number of students by course (or by category and subcategory) to calculate the cost.

However, budgeting costs by using the number of students that are specified by demand is not reliable, because this information is based on an *estimated* number of students.

For example, a maximum of ten students is allowed in a course session, and you plan to train five students.

1. You add five students to the budget plan.

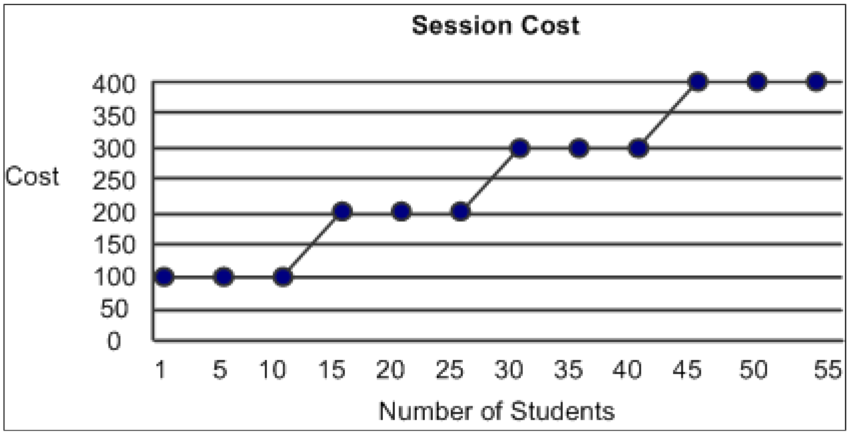
   The training cost doesn't change.

2. You add another student to the demand.

   The training cost doubles.

Based on current information, the computed training cost can differ dramatically due to a minor change in just one variable. However, because this information is an estimate, it isn't reliable.

The following graph shows the relationship of cost to the number of students that are expected to take a course. Costs remain flat as you increase the number of students without having to add another session, then jump up at the point where another session is required, for example, each time the number of students reaches an increment of 15, as shown here:

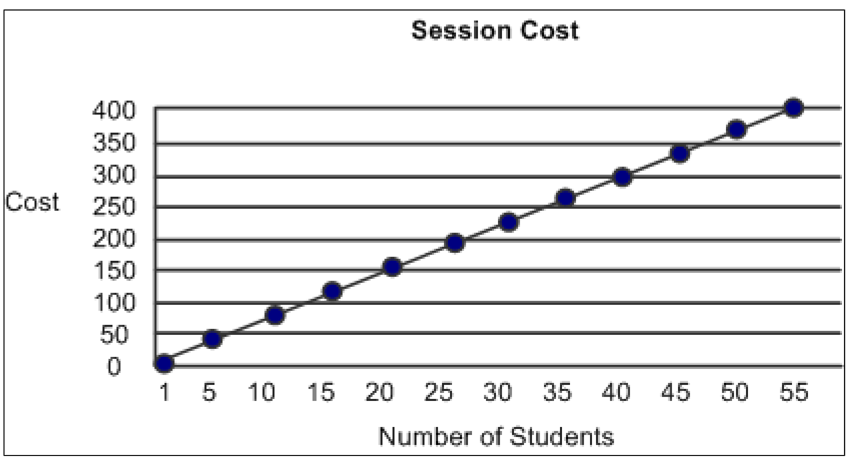


To avoid this problem, the system uses the following formula to calculate session padding and determine the cost of the training demand:

Number of students planned / Maximum number of students per course

This formula uses a progressive factor to determine the number of required sessions. The progressive factor is based on the number of students in the demand, which affects how the system determines the total session cost.

The following graph shows session costs when the progressive factor is applied. In this graphic, costs increase at a stead rate as the number of students increases:



Note: The system applies the session padding factor to calculate course session costs that are not student-dependent (flat costs and duration-dependent costs).

Cost Units in Budget Cost Calculations

When the system has determined the course session demand using session padding, it calculates costs based on the cost unit.

Cost Unit	***Cost Computation Detail***
None	Not possible: you must always provide a cost unit with a cost amount.
Km (kilometers)	These costs are converted directly to the base currency.
Flat Cost	Converted to the base currency and then multiplied by the session padding factor.
Hour	Converted to the base currency, multiplied by the course duration, and then multiplied by the session padding factor.
Day	Converted to the base currency, multiplied by the course duration, multiplied by the day annuity factor, divided by the hourly annuity factor, and then multiplied by the session padding factor.
Week	Converted to the base currency, multiplied by the course duration, multiplied by the week annuity factor, divided by the hourly annuity factor, and then multiplied by the session padding factor.
Month	Converted to the base currency, multiplied by the course duration, multiplied by the month annuity factor, divided by the hourly annuity factor, and then multiplied by the session padding factor.
Year	Converted to the base currency, multiplied by the course duration, divided by the hourly annuity factor, and then multiplied by the session padding factor.
Pers/Hr (person per hour)	Converted to the base currency, multiplied by the number of demands, and multiplied by the course duration.
Pers/Day (person per day)	Converted to the base currency, multiplied by the number of demands, multiplied by the course duration, and then divided by 8 (number of hours in a business day).
Pers/Week (person per week)	Converted to the base currency, multiplied by the number of demands, multiplied by the course duration, divided by 8 (number of hours in a business day), and then divided by 5 (number of days in a standard work week).

Cost Unit	*Cost Computation Detail*
Pers/Month (person per month)	Converted to the base currency, multiplied by the number of demands, multiplied by the course duration, multiplied by the month annuity factor, and divided by the hourly annuity factor.
Pers/Year (person per year)	Converted to the base currency, multiplied by the number of demands, multiplied by the course duration, and then divided by the hourly annuity factor.
Pers/Train (person per training)	Converted to the base currency and multiplied by the number of demands.

Note: Cost elements are updated as soon as training element costs are entered. If you change the annuity factor during a budget period, costs already computed are not affected. The annuity factor should be set before entering any costs.

Related Links

Selecting the Base Currency for Training Costs

Creating Department Scenarios

This topic discussing creating department scenarios using the Adjust Department Demand component.

Pages Used to Create Department Scenarios

Page Name	*Definition Name*	*Usage*
Adjust Department Demand - Demands Page	TRN_ADJ_DEM_TABLE	Develop a training plan scenario and make adjustments for demand IDs by department.
(FRA) Adjust Department Demand - Gender/Socio Prof Distribution Page	TRN_DPT_DMD_SEC2	(FRA) Enter country-specific department information.
Costs Details - Costs Details Page	TRN_SML_COST_TABLE	View the training component costs (such as equipment, vendors, and facilities) that make up the computed cost.

Related Links

Defining Employee Training Demands and Demand by Course

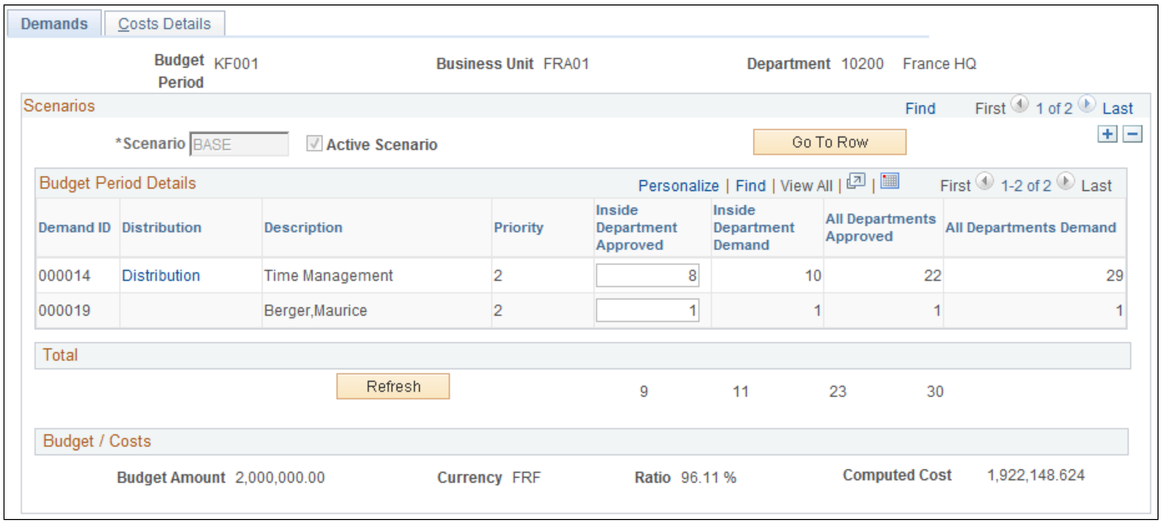
Adjust Department Demand - Demands Page

Use the Adjust Department Demand - Demands page (TRN_ADJ_DEM_TABLE) to develop a training plan scenario and make adjustments for demand IDs by department.

Navigation:

Administer Training > **Training Budget** > **Create Budget Plan** > **Adjust Department Demand** > **Demands**

This example illustrates the fields and controls on the Adjust Department Demand - Demands page. You can find definitions for the fields and controls later on this page.



Scenarios

Field or Control	***Description***
Scenario	Indicates the scenario on which the simulation is being performed. The system creates an initial base scenario when you first open this page. Insert new scenarios for the department if necessary. The system makes the **Scenario** field unavailable if the budget period is frozen.
Active Scenario	If this scenario is the active scenario, this check box is selected by default. The training plan is the combination of all active scenarios from all concerned departments, so only one scenario at a time can be active for each budget period, business unit, and department, although you can have multiple scenarios in the system. Once you've created scenarios in this component, you can activate a scenario on the Choose Active Scenario page.

Budget Period Details

The system builds scenarios using all training demands that are associated with the selected business unit, budget period, and department. The system also displays associated employee demand.

Note: An employee or department can be included in different training demands, because category, subcategory, and course code generate demand.

Field or Control	***Description***
Demand ID	Displays the demand ID.
Distribution	(FRA) Click this link to access the Adjust Department Demand - France page and enter country-specific department information. **Note:** To enter country-specific information, click the link in the same row as the desired demand ID.
Priority	Displays a numeric value that is associated with the priority that you assigned to the demand: *1:* High priority. *2:* Medium priority. *3:* Low priority.
Inside Department Approved	Enter the number of employees for each demand to include in the training budget. You can approve more employees for training for a demand ID than are included in the demand; for example, to add extra budgeting to account for additional department costs for new or transferred employees.
Inside Department Demand	Displays the total demand that you specified for the selected demand ID.
All Departments Approved	Displays the number of approved demands for the specified budget period for all departments, not just for the one that you're working with on this page.
All Departments Demand	Displays the total number of demands for the specified budget period for all departments.

Total

This region shows a running total of approved demands and the total number of requested demands, by department, for all departments.

Field or Control	***Description***
Refresh	Click the Refresh button to adjust total or summary amounts.

Budget/Costs

This region compares the budget amount value to the computed cost value, based on the selected demands.

Field or Control	***Description***
Budget Amount	The default budget amount for this period appears from the Department Budget page.
Ratio	The percentage of the budget amount that the computed cost represents.
Computed Cost	The system calculates the cost of the training for the department based on the approved demands.

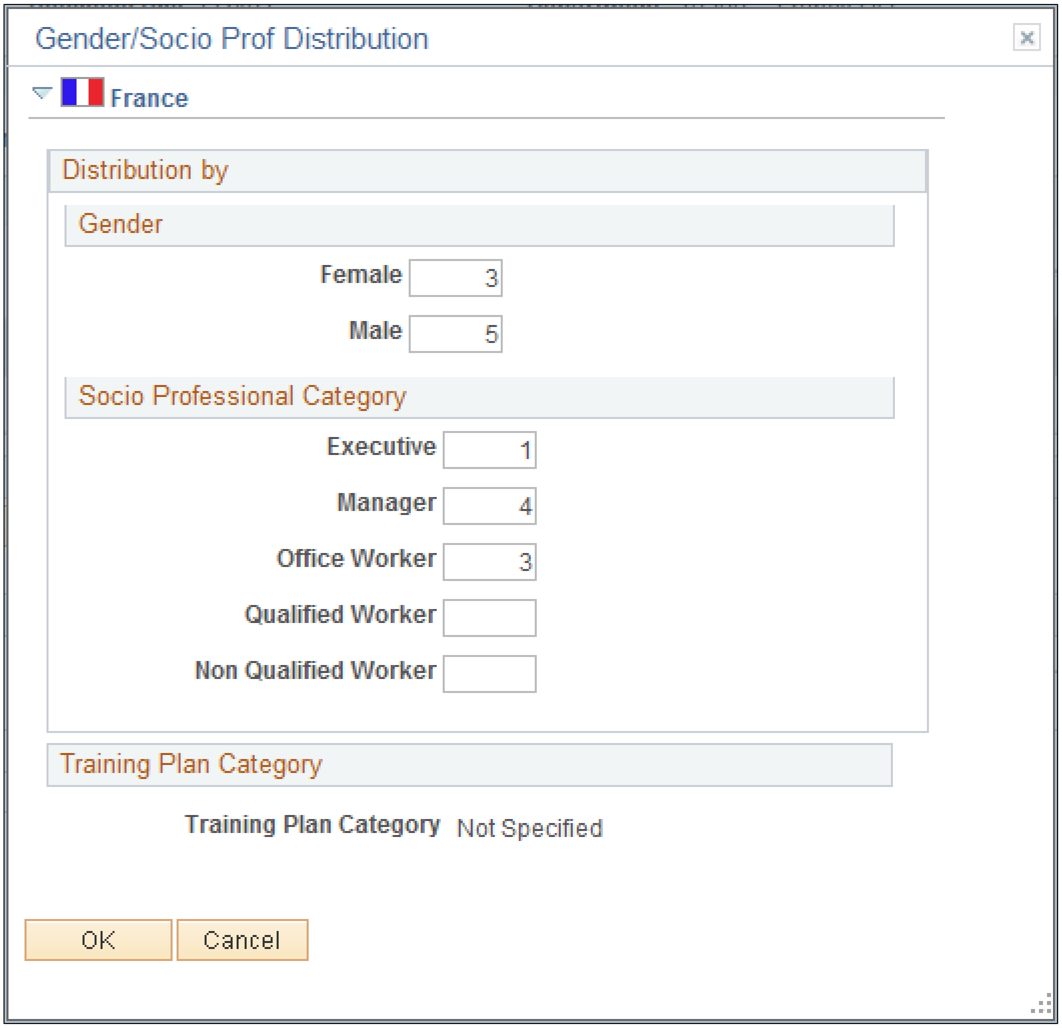
(FRA) Adjust Department Demand - Gender/Socio Prof Distribution Page

Use the Adjust Department Demand - Gender/Socio Prof Distribution page (TRN_DPT_DMD_SEC2) to enter country-specific department information for France.

Navigation:

Click the **Distribution** link on the Adjust Department Demand - Demands page.

This example illustrates the fields and controls on the Adjust Department Demand - Gender/Socio Prof Distribution page. You can find definitions for the fields and controls later on this page.



Define how the training demand divides by gender and professional category. The sums of the entries on this page must equal the total general demand that you specified on the Adjust Department Demand - Demands page.

Gender

Enter the number of female and male employees who make up the demand shown on the Training Population page.

Socio Professional Category

In the field for each category, enter the number of employees who make up the demand for that category. You can print a training plan distribution report that shows how the training demands are distributed by gender and professional category.

Training Plan Category

Displays the training plan category associated with the Demand ID.

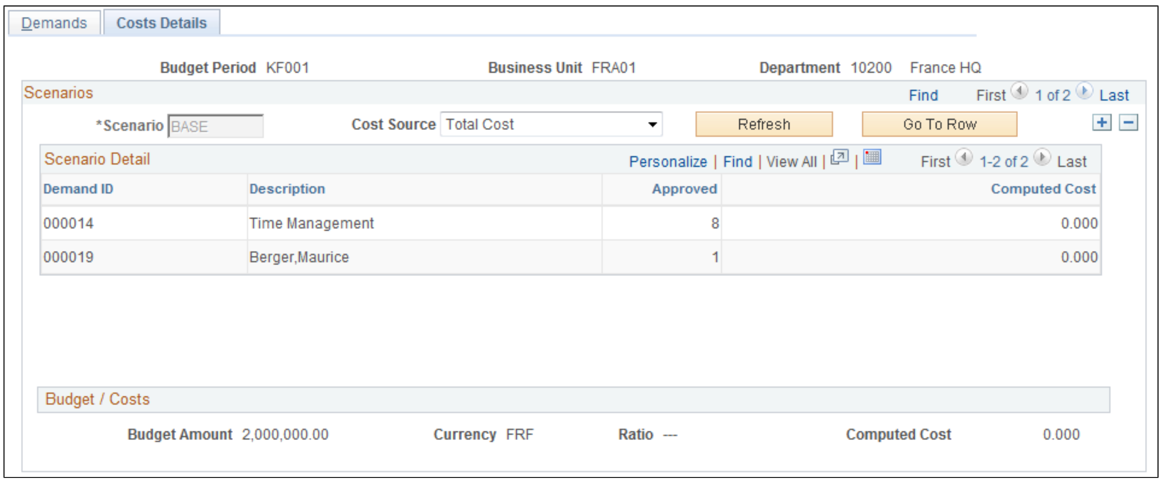
Costs Details - Costs Details Page

Use the Costs Details - Costs Details page (TRN_SML_COST_TABLE) to view the training component costs (such as equipment, vendors, and facilities) that make up the computed cost.

Navigation:

Administer Training > **Training Budget** > **Create Budget Plan** > **Adjust Department Demand** > **Costs Details**

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



Scenarios

Field or Control	*Description*
Scenario	Displays the scenario that you selected on the Adjust Department Demand - Demands page.
Cost Source	Select a cost source to view a breakdown of the costs for a particular training component. Values are: *Equipment, Expense, Facility, Vendor, Instructor, Salary Cost,* and *Total Cost.* For example, if you select *Equipment,* the system displays the cost of equipment for each demand ID and compares the total equipment cost for all demand IDs to the budget period budget amount and the percentage of the budget that is represented by equipment costs.

Scenario Detail

Field or Control	***Description***
Demand ID	For each demand ID, the system displays the approved demand and computed cost for the cost type that is specified in the **Cost Source** field.

Budget/Costs

Compare the budget amount to the computed cost for each training element or to the total cost of all elements.

Note: The total budget amount that appears is the allocated budget amount from the Department Budget page for this department and budget period only.

Creating Global Scenarios

For smaller or more centralized organizations, you can define the training plan by using global scenarios. When you create global scenarios, you limit their scope by defining special criteria that tell the system what to include in each scenario. For example, you can limit the scope of a global scenario by excluding certain demands. You can increase the demands in a new scenario by multiplying the approved in existing demands by a user-specified factor.

Options for creating global scenarios:

- Using selection criteria
- Copying existing scenarios

Note: Global scenarios are specific to budget periods and business units, but they include all departments within the business unit that you specify when you create the global scenario.

These topics discuss how to:

- Include and exclude departments, job codes, and competencies.
- Write selection criteria.
- Create scenarios by copying an existing scenario.

Pages Used to Create Global Scenarios

Page Name	***Definition Name***	***Navigation***	***Usage***
Training Scenario by Criteria - Criteria 1 Page	RUNCTL_TRN008_1	**Administer Training > Training Budget > Create Budget Plan > Training Scenario by Criteria > Criteria 1**	Include or exclude departments, job codes, and competencies for a budget period and business unit in the global scenario.
Training Scenario by Criteria - Criteria 2 Page	RUNCTL_TRN008_2	**Administer Training > Training Budget > Create Budget Plan > Training Scenario by Criteria > Criteria 2**	Write criteria to specify courses to include in the scenario.
Add Training Global Scenario Page	RUNCTL_TRN007	**Administer Training > Training Budget > Create Budget Plan > Add Training Global Scenario > Add Training Global Scenario**	Create a scenario by copying a global or active scenario that you previously created for another budget period or business unit.

See *PeopleTools: Process Scheduler*

Training Scenario by Criteria - Criteria 1 Page

Use the Training Scenario by Criteria - Criteria 1 page (RUNCTL_TRN008_1) to include or exclude departments, job codes, and competencies for a budget period and business unit in the global scenario.

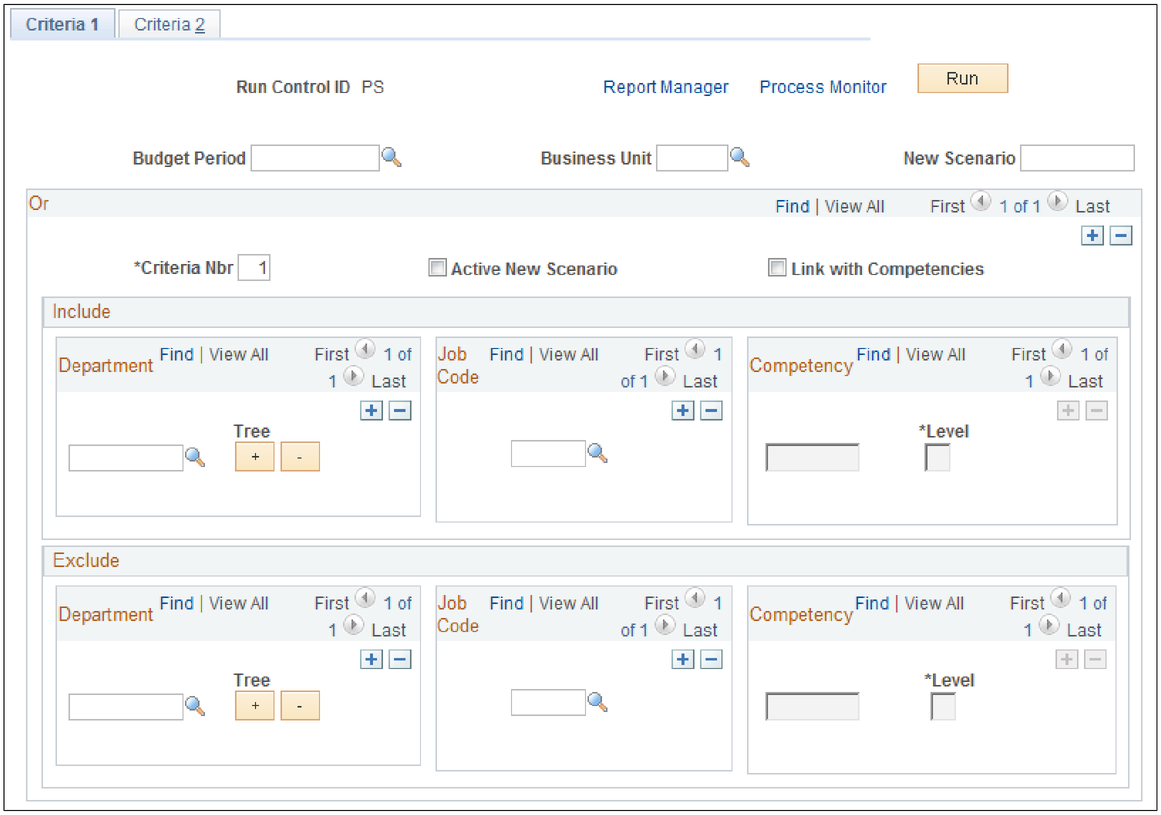
HCM\hhat:\

~Creating Global Scenarios

Navigation:

Administer Training > Training Budget > Create Budget Plan > Training Scenario by Criteria > Criteria 1

This example illustrates the fields and controls on the Training Scenario by Criteria - Criteria 1. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Budget Period and **Business Unit**	Select a budget period and business unit to associate with the new global scenario.

Or

Field or Control	Description
Criteria Nbr (criteria number)	When you open the page, the system specifies that the first criteria number (selection statement) is *1*. You can enter multiple inclusion or exclusion statements. The system processes the statements in order based on their criteria number. This order can affect the result of the Create Scenario w/ Criterias (TRN008) process, so carefully consider how you organize these statements. To reorganize a series of statements, update the **Criteria #** fields and save the page. When you reopen the page, the system displays the statements in the appropriate order.

Field or Control	***Description***
Link with Competencies	Select to include competencies as part of the criteria statement. The system makes the **Competency** fields available.
Competency	Select the competency and select a competency rating in the **Level** field. You define competency codes in the Content Catalog and the associated rating levels on the Rating Model table. When you complete the Competency fields, the system includes or excludes workers whose PERSON profile includes competencies at the rating that you specified. The Content Catalog, and Profile Management are part of the Manage Profiles business process.

Enter a new criteria number to define additional profile criteria statements.

Include

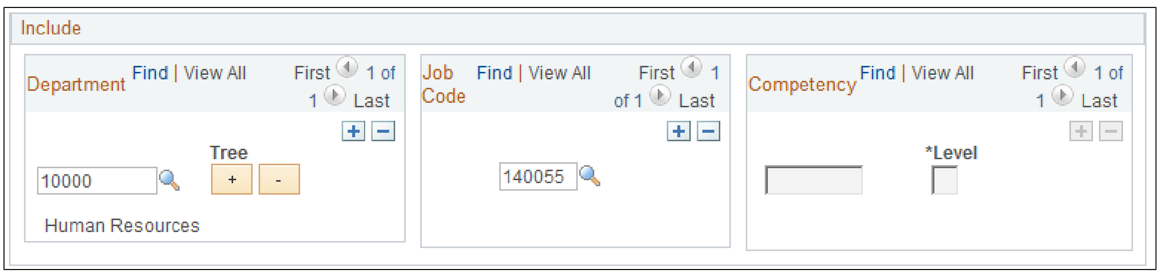
Field or Control	***Description***
Department, Job Code, and **Competency**	Select the department, job code, and competency to include in the scenario. To include both the department and its child departments in the department tree, use one of the buttons below the tree.
+	Click the **Expand** button to add related departments in the department tree to the list on this page. Then you can add several departments to the list in one step.
-	Click the **Collapse** button to delete related departments from the list. The system deletes only the departments that you added by clicking the **Expand** button. Departments that you added manually remain in the list, even if they are related departments.

Exclude

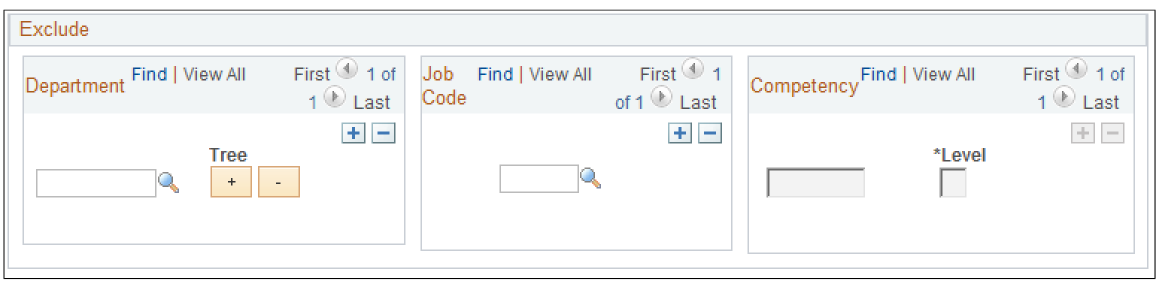
Field or Control	***Description***
Department, Job Code, and **Competency**	Select the department, job code, and competency to exclude from the scenario. Use the **Expand** and **Collapse** buttons to add or remove departments from the department tree. **Note:** You can select only departments that are associated with the business unit that you associated with the new global scenario in the **Business Unit** field.

Criteria Statement Example

In the following example, the selection includes employees in department 10000 who are assigned to job code 140055, Payroll Analyst:



In the same selection criteria statement, you can exclude employees with an expert rating (level 5) in competency 0703, Negotiation, as shown in this example:



Note: You can decide *not* to enter a department, job code, or competency in a criteria statement. For example, if you specify department 1000 and competency 0703, but leave the job code field blank in the Exclude criteria statement, the system excludes any employee in department 10000 with an expert rating in competency 0703.

Related Links

"Understanding the Content Catalog" (PeopleSoft Human Resources Manage Profiles)

"Understanding Profile Management" (PeopleSoft Human Resources Manage Profiles)

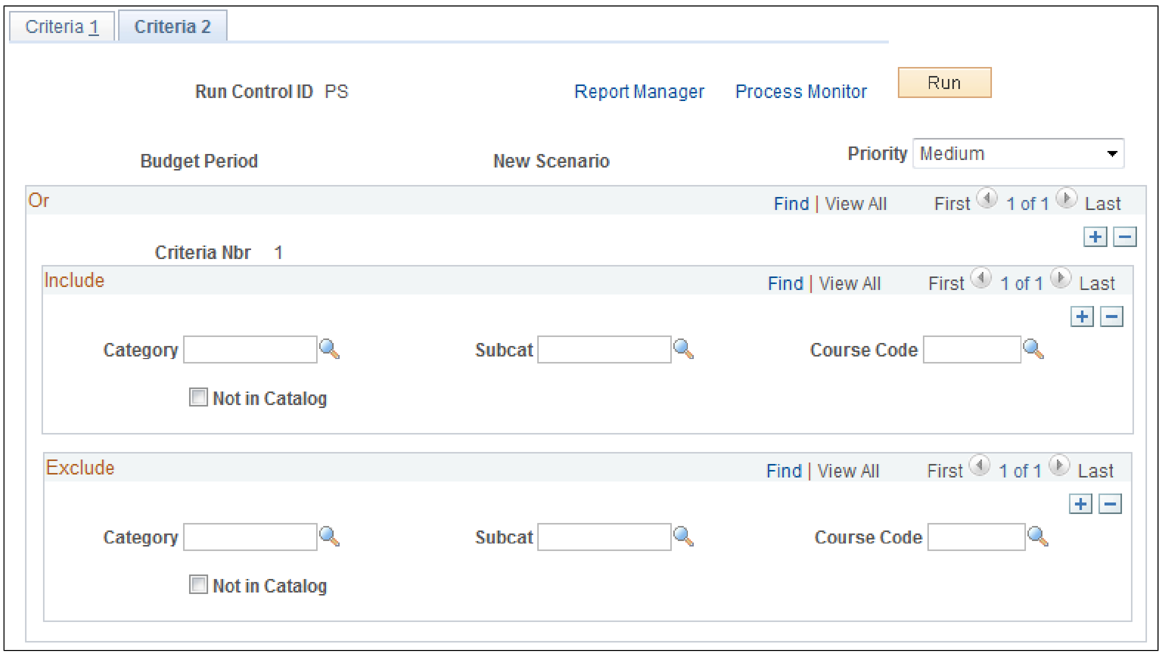
Training Scenario by Criteria - Criteria 2 Page

Use the Training Scenario by Criteria - Criteria 2 page (RUNCTL_TRN008_2) to write criteria to specify courses to include in the scenario.

Navigation:

Administer Training > **Training Budget** > **Create Budget Plan** > **Training Scenario by Criteria** > **Criteria 2**

This example illustrates the fields and controls on the Training Scenario by Criteria - Criteria 2 page. You can find definitions for the fields and controls later on this page.



For each demand selection statement (criteria number) that you defined on the Training Scenario by Criteria - Criteria 1 page, enter the courses to include or exclude from the global scenario.

Field or Control	***Description***
Category, Subcat, (subcategory), and **Course Code**	In the **Course Code** fields, select a course that is associated with the selected category and subcategory.

To calculate costs for the courses that are not in the catalog, the costs for the course (such as vendor, instructor, and facility costs) need to be stored in the Course Cost table.

For example, if you include the category Computers, the subcategory OPER SYS (operating systems), and the course code 4002, DOS/Windows Operating System, the global scenario includes all the demands that you have for that course.

See the *PeopleTools: Process Scheduler* product documentation.

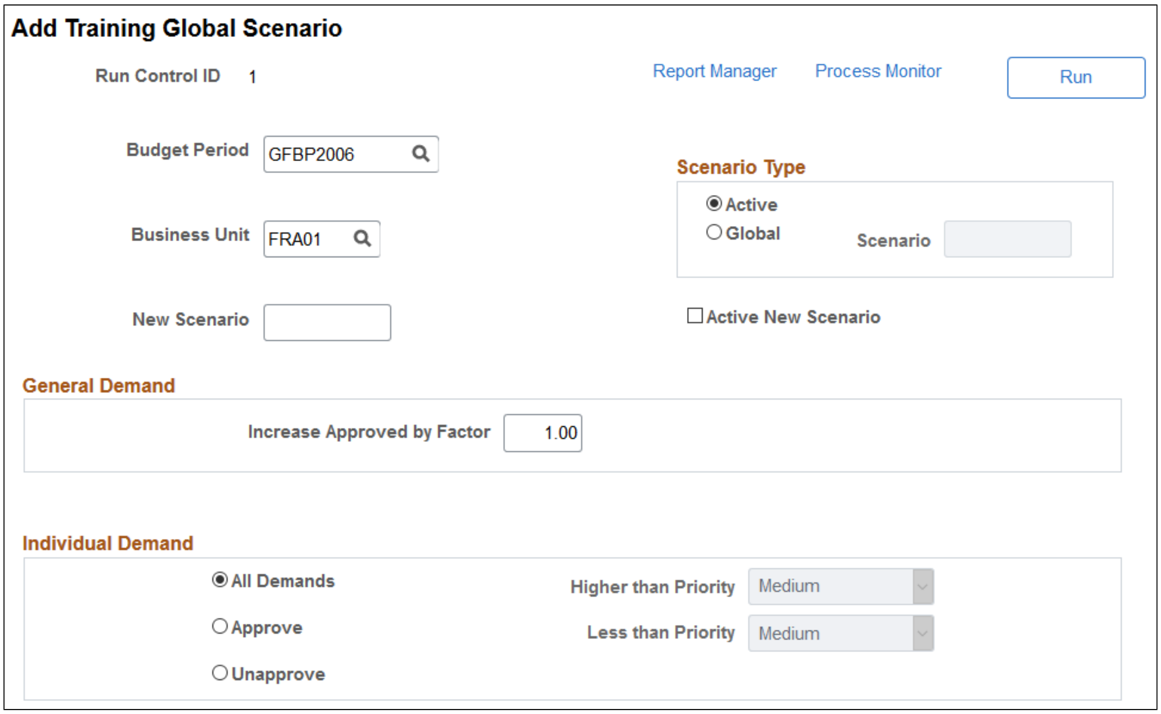
Add Training Global Scenario Page

Use the Add Training Global Scenario page (RUNCTL_TRN007) to create a scenario by copying a global or active scenario that you previously created for another budget period or business unit.

Navigation:

Administer Training > **Training Budget** > **Create Budget Plan** > **Add Training Global Scenario** > **Add Training Global Scenario**

This example illustrates the fields and controls on the Add Training Global Scenario page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Budget Period and **Business Unit**	Select the budget period and business unit to be associated with the new scenario.

Scenario Type

Field or Control	*Description*
Active	Selects the current active scenario for the specified business unit. You can have only one active scenario for a specified budget period.
Global	If you select global, select an existing global scenario as the source for the new scenario.

Note: If the budget period that you specified is frozen, you cannot make the global scenario that you're defining here the active scenario.

General Demand

Field or Control	*Description*
Increase Approved by Factor	Enter a multiplier: • To reduce the total number of approved general demands, enter a value of less than 1. • To increase the total number of approved general demands, enter a value of more than 1. • To keep the total number of approved general demands as they are in the source scenario, enter *1*. For example, if you enter .75, and the source scenario specifies 100 approved demands, then the new global scenario will have 75 approved demands after the build process. To double the approved demands, enter *2.* The result will be 200 approved demands in the new scenario.

Individual Demand

Specify employee demands to include in the new global scenario.

Field or Control	*Description*
All Demands	Select to copy existing employee demands.
Approve	Select to copy approved demands to the new scenario.
higher than Priority	If you approve, select a priority in this field to copy approved demands that are higher than the selected priority. Values are *Low, Medium,* and *High.* For example, if you select *Low,* the system includes all *Medium* and *High* priority demands.
Unapprove	Select to copy employee demands that are unapproved. Unapproved demands have an approved head count of 0, even though there is a requested demand head count for the demand ID.

Field or Control	***Description***
less than priority	If you disapprove, select a priority for copying unapproved demands that are lower than the selected priority.

Note: You establish demand priority for employees by using the Employee Demand page and the Employee Demand by Course page.

See the *PeopleTools: Process Scheduler* product documentation.

Activating Scenarios and Viewing Summaries

These topics discuss how to activate scenarios and view cost and demand details.

Pages Used to Activate Scenarios and View Summaries

Page Name	***Definition Name***	***Navigation***	***Usage***
Choose Active Scenario Page	TRN_ADJ_SCE_TABLE	**Administer Training** > **Training Budget** > **Create Budget Plan** > **Choose Active Scenario** > **Choose Active Scenario**	Select a scenario to activate. You can only work with the active scenario on the Adjust Department Demand component.
Activate Global Scenario	TRN_LST_SCE_TABLE	**Administer Training** > **Training Budget** > **Create Budget Plan** > **Activate Global Scenario** > **Activate Global Scenario**	Make a global scenario your active scenario for a budget period and business unit.
Review Active Scenario-Apprvd	TRN_ADJ_DEP_TABLE	**Administer Training** > **Training Budget** > **Create Budget Plan** > **Review Active Scenario-Apprvd** > **Review Active Scenario-Apprvd**	View approved demands for the active scenario.
Summarize Active Scenario - Total Costs Page	TRN_SML_DEP_TABLE	**Administer Training** > **Training Budget** > **Create Budget Plan** > **Summarize Active Scenario** > **Total Costs**	View cost details and the total cost of the active scenario.

Page Name	Definition Name	Navigation	Usage
Summarize Active Scenario - Demands Page	TRN_SML_DEM_TABLE	**Administer Training > Training Budget > Create Budget Plan > Summarize Active Scenario > Demands**	View summary information about demands that are associated with the active scenario. You can obtain a printed report of the information by running the Active Scenario Summary report.
Summarize Global Scenario - Total Costs	TRN_SML_DEPG_TABLE	**Administer Training > Training Budget > Create Budget Plan > Summarize Global Scenario > Total Costs**	View cost details and the total cost of a global scenario.
Summarize Global Scenario - Demands	TRN_SML_DEMG_TABLE	**Administer Training > Training Budget > Create Budget Plan > Summarize Global Scenario > Demands**	View summary information about demands that are associated with a global scenario. You can obtain a printed report of the information by running the Global Scenario Summary report.

Choose Active Scenario Page

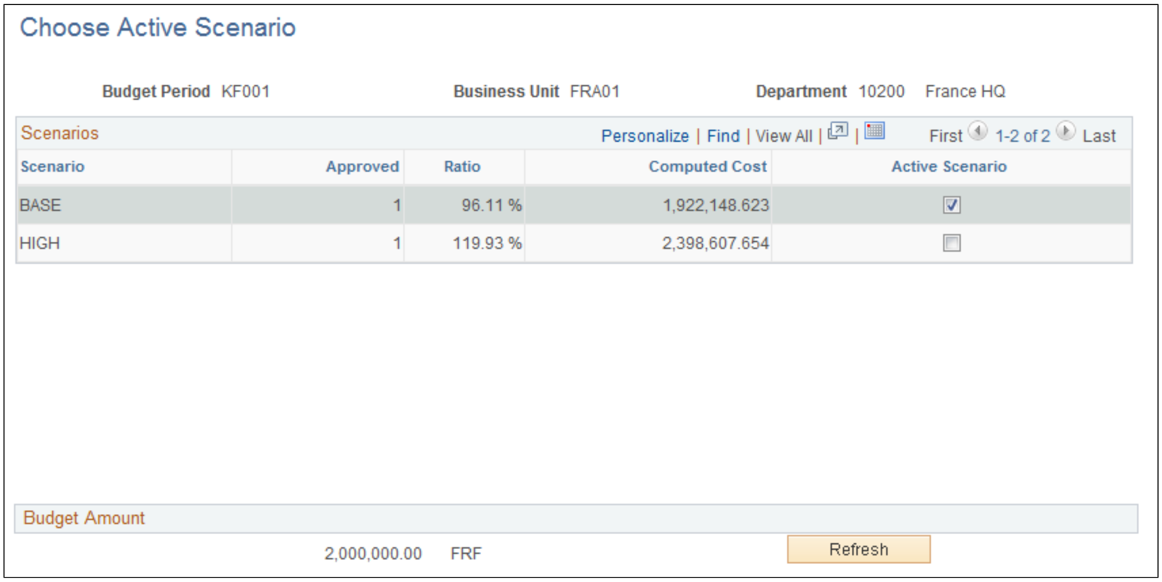
Use the Choose Active Scenario page (TRN_ADJ_SCE_TABLE) to select a scenario to activate.

You can only work with the active scenario on the Adjust Department Demand component.

Navigation:

Administer Training > Training Budget > Create Budget Plan > Choose Active Scenario > Choose Active Scenario

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



Only one scenario can be active for a specified budget period and business unit, although you can work with different budget scenarios in the Budget Training business process. You cannot change the status of a scenario that is part of a frozen budget. Click the Refresh button to view computed amounts.

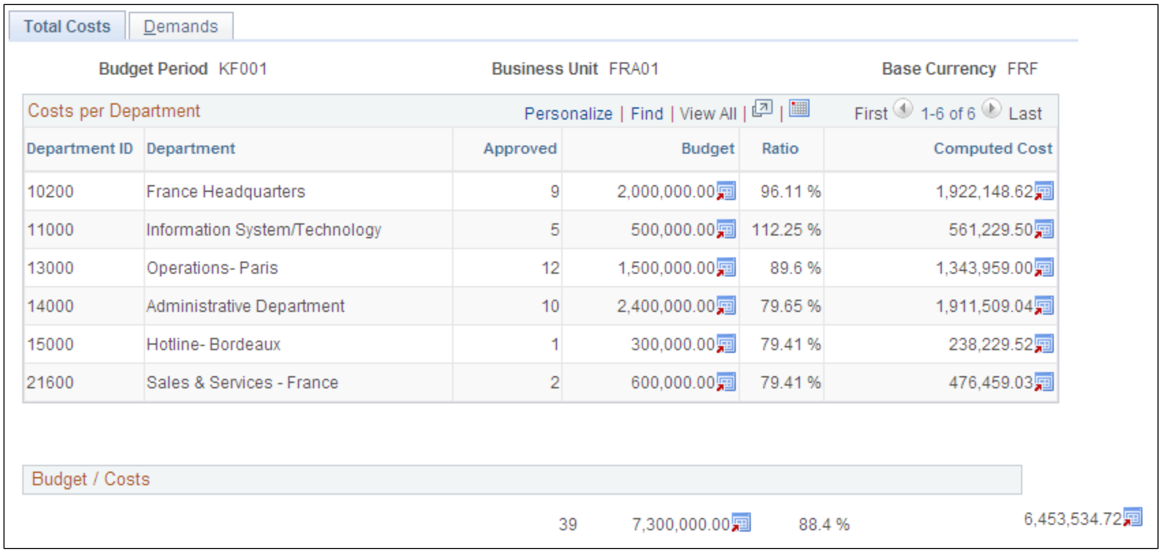
Summarize Active Scenario - Total Costs Page

Use the Summarize Active Scenario - Total Costs page (TRN_SML_DEP_TABLE) to view cost details and the total cost of the active scenario.

Navigation:

Administer Training > **Training Budget** > **Create Budget Plan** > **Summarize Active Scenario** > **Total Costs**

This example illustrates the fields and controls on the Summarize Active Scenario - Total Costs page. You can find definitions for the fields and controls later on this page.



Total Costs | Demands

Budget Period KF001 Business Unit FRA01 Base Currency FRF

Costs per Department — Personalize | Find | View All | First 1-6 of 6 Last

Department ID	Department	Approved	Budget	Ratio	Computed Cost
10200	France Headquarters	9	2,000,000.00	96.11 %	1,922,148.62
11000	Information System/Technology	5	500,000.00	112.25 %	561,229.50
13000	Operations- Paris	12	1,500,000.00	89.6 %	1,343,959.00
14000	Administrative Department	10	2,400,000.00	79.65 %	1,911,509.04
15000	Hotline- Bordeaux	1	300,000.00	79.41 %	238,229.52
21600	Sales & Services - France	2	600,000.00	79.41 %	476,459.03

Budget / Costs

39 7,300,000.00 88.4 % 6,453,534.72

This page displays the cost detail for the active scenario sorted by department. For each department, the system displays the department ID and description, and the number of employees that you approved for the training on the Adjust Department Demand - Demands page.

The system populates the department budget amount from the Department Budget table and the current computed cost from the Adjust Department Demand - Cost Details page. The ratio shows the percentage of the department budget amount to the current computed cost for the approved demands. You can quickly determine whether one department is over or under budget.

The **Budget/Costs** region displays the total of the approved employee demands for all departments included in the active scenario. The system displays the total training budget for all departments and the current total computed cost. The ratio indicates whether the current computed costs are over or under budget.

Summarize Active Scenario - Demands Page

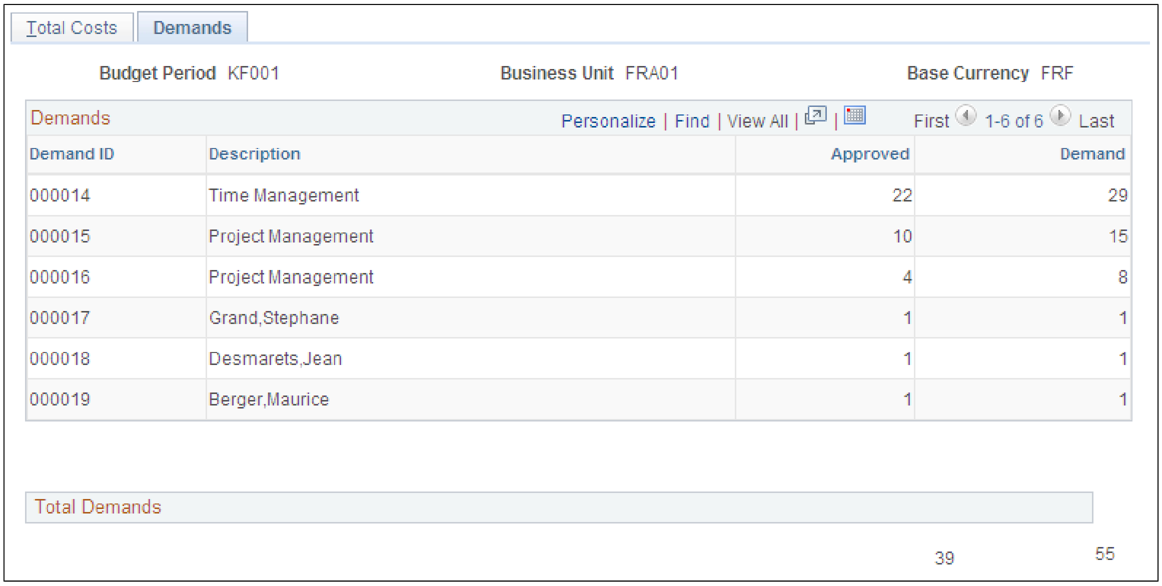
Use the Summarize Active Scenario - Demands page (TRN_SML_DEM_TABLE) to view summary information about demands that are associated with the active scenario.

You can obtain a printed report of the information by running the Active Scenario Summary report.

Navigation:

Administer Training > **Training Budget** > **Create Budget Plan** > **Summarize Active Scenario** > **Demands**

This example illustrates the fields and controls on the Summarize Active Scenario - Demands page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Demand ID	Displays the demand ID and its description.

Tracking Training Plans

A training plan can undergo constant cost reviews and updates until you freeze the plan. You create department views to help analyze the training plan. For example, you can create a department view that corresponds to a business unit and view the aggregate training plan for all departments in that unit. These groups of departments form snapshot views, which you can use to perform comparative cost analysis.

These topics discuss how to track the training plans.

Pages Used to Track Training Plans

Page Name	***Definition Name***	***Usage***
Department View Page	TRN_DSPL_TARGET	Define departmental groups to display all or part of the training plan and compare actual costs to budgeted costs.
Review Training Plan - Course List Page	TRN_PLAN_APR_TABLE	View training plans by department.
Review Training Plan - Training Plan Page	TRN_PLAN_TABLE	Viewing course list by training plan category.

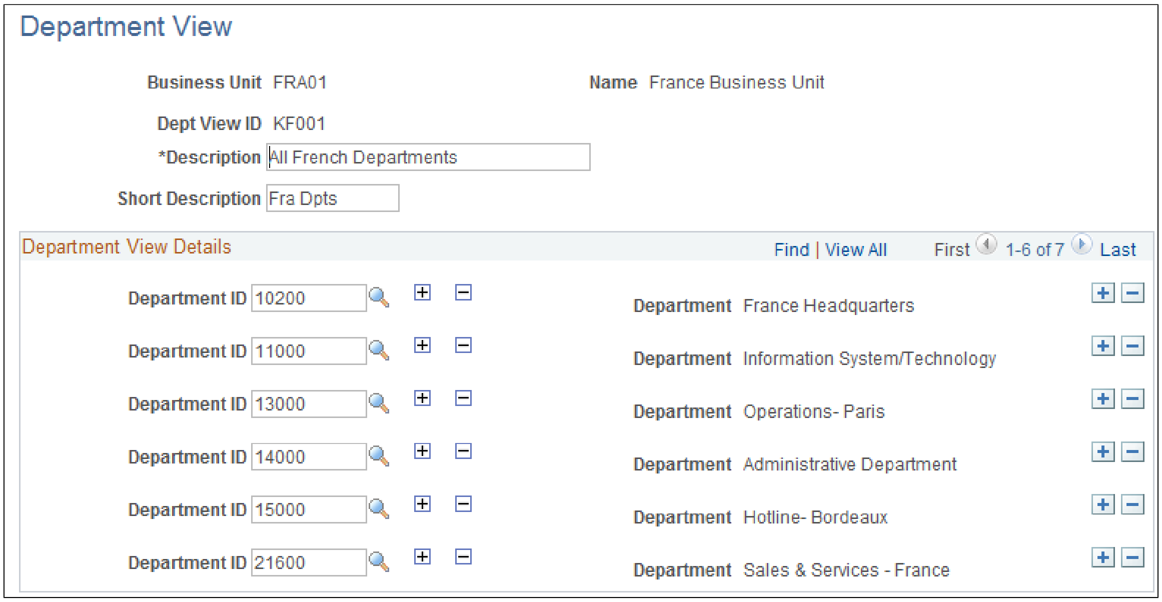
Department View Page

Use the Department View page (TRN_DSPL_TARGET) to define departmental groups to display all or part of the training plan and compare actual costs to budgeted costs.

Navigation:

Administer Training > **Define Budget** > **Department View** > **Department View**

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



In the **Department ID** field, select the departments to include in your view. The **Tree** field provides options and information about the department.

Related Links

Department Trees

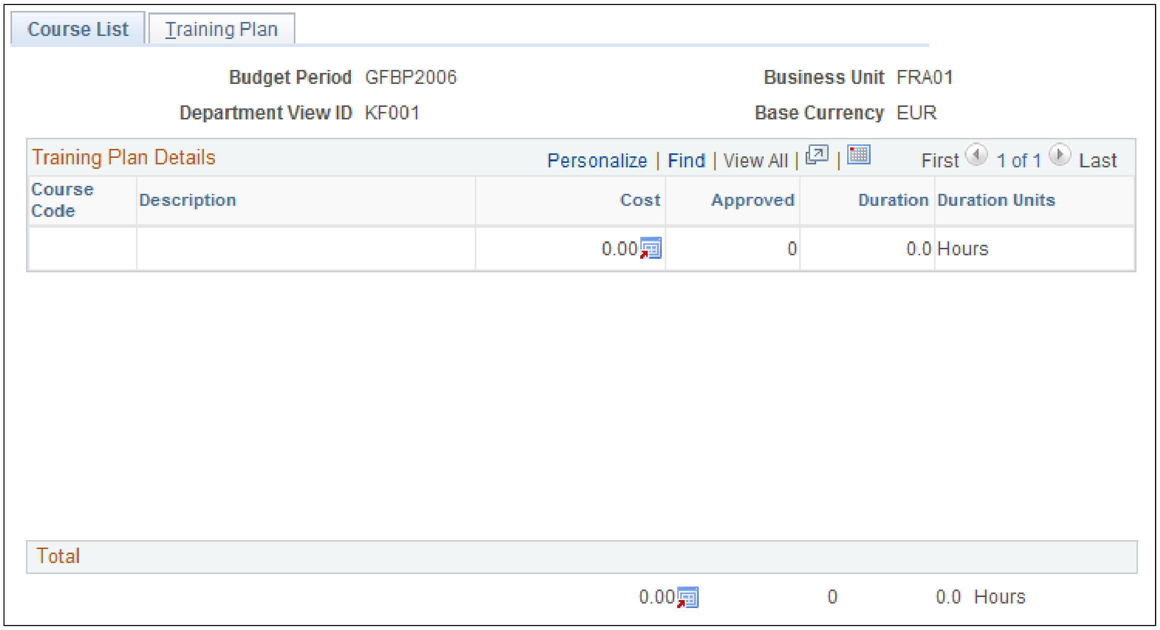
Review Training Plan - Course List Page

Use the Review Training Plan - Course List page (TRN_PLAN_APR_TABLE) to view training plans by department.

Navigation:

Administer Training > **Training Budget** > **Budget Reports** > **Review Training Plan** > **Course List**

This example illustrates the fields and controls on the Review Training Plan - Course List page. You can find definitions for the fields and controls later on this page.



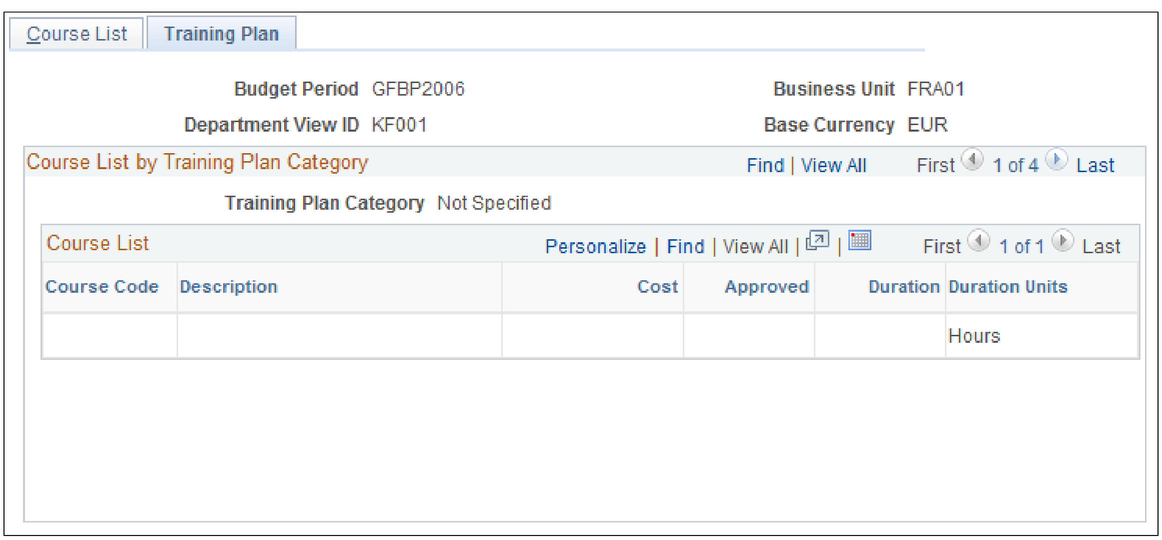
Review Training Plan - Training Plan Page

Use the Review Training Plan - Training Plan page (TRN_PLAN_TABLE) to viewing course list by training plan category.

Navigation:

Administer Training > **Training Budget** > **Budget Reports** > **Review Training Plan** > **Training Plan**

This example illustrates the fields and controls on the Review Training Plan - Training Plan page. You can find definitions for the fields and controls later on this page.



Freezing Budgets, Moving Unapproved Demands, and Deleting Scenarios

When you finish creating, reviewing, and adjusting your training scenarios, you can freeze the company training budget for a specified budget period and business unit.

Once you freeze a budget:

- You cannot update or change any demands or scenarios that are associated with that budget period and business unit.
- You can move unapproved demands from the frozen budget period to the next budget period.

  You can set the system to include employees whose training requests weren't approved in one budget period as part of the demand for the next budget period.
- You can delete scenarios that you no longer need.
- You can use this training plan to track budgeted costs verse actual costs.

These topics discuss how to:

- Freeze budget periods.
- Move unapproved demands to the next period.
- Delete obsolete global scenarios.

Pages Used to Freeze Budgets, Move Unapproved Demands, and Delete Scenarios

Page Name	***Definition Name***	***Usage***
Freeze Budget Period Page	TRN_FREEZE_PERIOD	Freeze or unfreeze a budget period.
Move unapproved Demands Page	RUNCTL_TRN015	Move unapproved demands to the next budget period after the current budget period has been frozen.
Delete Inactive Scenario Page	RUNCTL_TRN031	Delete obsolete global scenarios. You can delete a global scenario only if the scenario's status is Inactive and the budget period for the associated business unit is frozen.

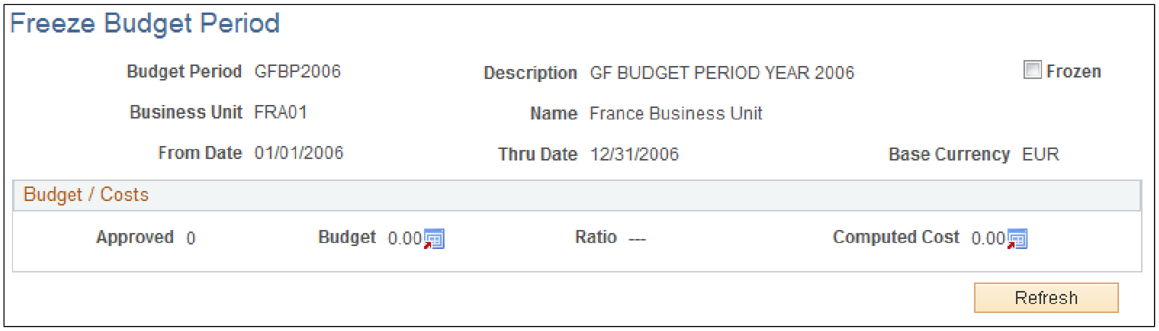
Freeze Budget Period Page

Use the Freeze Budget Period page (TRN_FREEZE_PERIOD) to freeze or unfreeze a budget period.

Navigation:

Administer Training > **Training Budget** > **Freeze Training Budget** > **Freeze Budget Period** > **Freeze Budget Period**

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



This page displays all of the approved demands, the total budget (the sum of the department budgets included in the plan), the total computed cost for the departments in the training plan; and the budget-to-cost ratio for the entire training plan.

To freeze the plan, select the **Frozen** check box and save the page. This freezes the budget for the entire business unit.

Note: Freezing a training plan turns it into a *live* training budget for the specified business unit and budget period.

To unfreeze a training period, deselect the **Frozen** check box and save the page.

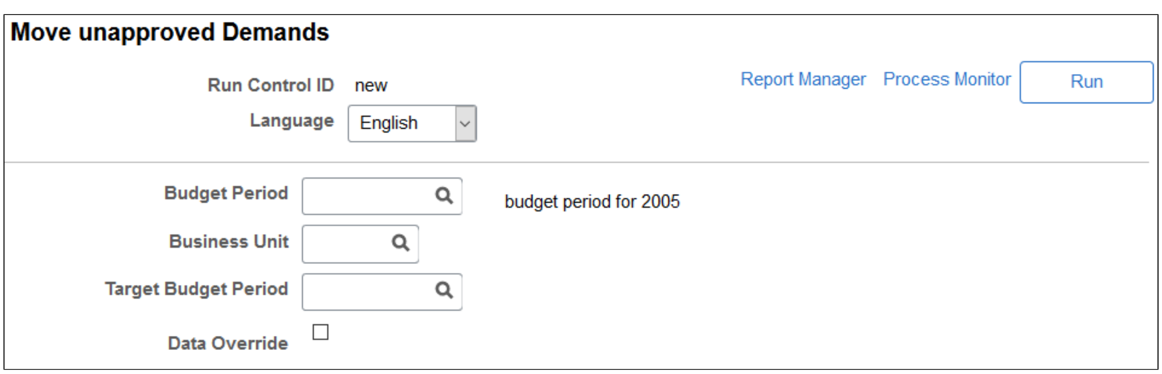
Move unapproved Demands Page

Use the Move unapproved Demands page (RUNCTL_TRN015) to move unapproved demands to the next budget period after the current budget period has been frozen.

Navigation:

Administer Training > **Training Budget** > **Freeze Training Budget** > **Move unapproved Demands** > **Move unapproved Demands**

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



A demand with an Approved field value of *0* is considered unapproved. Also, if you have a demand ID with a requested demand of *16,* and you approved only 12, the system considers the unapproved demands for the demand ID to be *4,* because you didn't approve 4 of the requested head count. The Move Non Approved Demands process carries forward the 4 unapproved demands for the demand ID.

Field or Control	***Description***
Budget Period and **Business Unit**	Select the budget period and business unit to move the unapproved demands from.
Target Budget Period	Select the budget period to move the demands to. **Note:** Apply this process to unapproved budgets before creating new demands for the target budget period.
Data Override	If you have already run the Move Non Approved Demands process, select to override the results from the previous run with the new results. **Important!** If you deselect this check box, and you're running the process for the first time, the system does not override any manual changes that you've made to the process results. If you rerun the process later with this check box selected, then any changes that you made for unapproved demands on the source budget period are reflected in the target budget period. If the check box is deselected, you'll lose any changes.

Delete Inactive Scenario Page

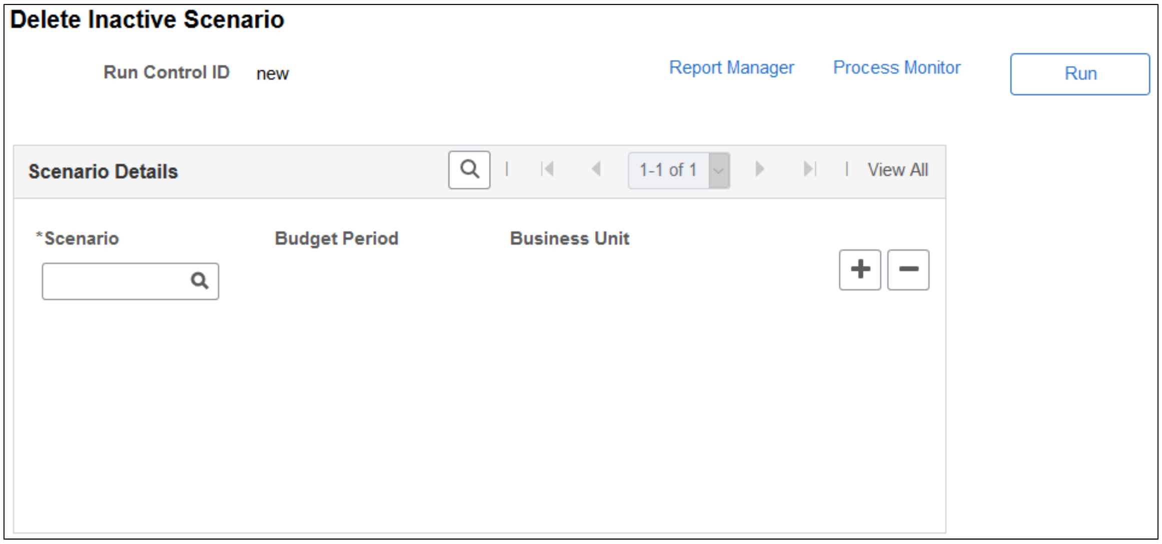
Use the Delete Inactive Scenario (delete inactive global scenario) page (RUNCTL_TRN031) to delete obsolete global scenarios.

You can delete a global scenario only if the scenario's status is Inactive and the budget period for the associated business unit is frozen.

Navigation:

Administer Training > **Training Budget** > **Create Budget Plan** > **Delete Inactive Scenario** > **Delete Inactive Scenario**

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



When you run this process, the system deletes data from the TRN_SIMULATION and TRN_SCENARIO tables.

Scenario Details

Field or Control	***Description***
Scenario	Select the scenario to delete. The system lists only the scenarios that are inactive and refer to a frozen budget period. When you move out of this field, the system populates the **Budget Period** and **Business Unit** fields. Add a row for each scenario that you want to delete.
Budget Period	Displays the budget period that you associated with the scenario. You specify the budget period when you create the scenario.

See *PeopleTools: Process Scheduler*.

Running Budget Training Reports

This topic discusses how to generate budget training reports.

Pages Used to Run Budget Training Reports

Page Name	***Definition Name***	***Navigation***	***Usage***
Active Training Summary	RUNCTL_TRN010	**Administer Training** > **Training Budget** > **Budget Reports** > **Active Training Summary** > **Active Training Summary**	Summarize approved training demands and budget information for a business unit. This is an SQR report.
Training Global Summary	RUNCTL_TRN011	**Administer Training** > **Training Budget** > **Budget Reports** > **Training Global Summary** > **Training Global Summary**	Summarize approved training demands and budget information for the department or business unit. It retrieves the information from the selected global scenario. This is an SQR report.
Training Budget Plan Summary	RUNCTL_TRN030	**Administer Training** > **Training Budget** > **Budget Reports** > **Training Budget Plan Summary** > **Training Budget Plan Summary**	List all courses that are included in the training plan for a given budget period and business unit. For each course, the report includes the cost, the number of people approved, and the total number of hours of training, which is calculated by multiplying the number of approved employees by the course duration. This is an SQR report.
Training Plan Distribution FRA	RUNCTL_TRN035	**Administer Training** > **Training Budget** > **Budget Reports** > **Training Plan Distribution FRA** > **Training Plan Distribution FRA**	Detail how a French organization's training demands are distributed by gender and professional category, such as executive, manager, office worker, qualified worker, and nonqualified worker. This is an SQR report.
Training Plan Cost Details FRA	RUNCTL_TRN036	**Administer Training** > **Training Budget** > **Budget Reports** > **Training Plan Cost Details FRA** > **Training Plan Cost Details FRA**	Lists a French organization's training costs that are associated with each course. Details these cost types: facility, instructor, vendor, equipment, salary costs, and expenses. This is an SQR report.

Chapter 6

Administering Course Sessions

Understanding Course Sessions

These topics list common elements and discuss cut sessions.

Common Elements Used to Administer Course Sessions

Field or Control	***Description***
Business Unit	Select the unit to which a cost should be applied when you update budgets, using the Compute Student Costs and Update Planned and Real Costs processes.
Department	Select a department to associate with the selected business unit.
TrngReq Nbr (training request number)	The system displays this number on some course evaluation pages.
(FRA) Financing Department	Select the department that finances the training session.
(FRA) Financed Cost	Enter the amount if some or all of the cost is financed by an external fund.
(FRA) Financing Fund	Select the fund that is financing the cost. Define funds in the Vendor table.

Cut Sessions

Course sessions can be divided into cut sessions. Each cut session has its own start date, end date, location, and instructor. Use cut sessions for course sessions that:

- Don't run consecutively from start to finish, such as a course that runs two days a week for a month.
- Are held in various training rooms or facilities.
- Have multiple instructors.

Related Links

Understanding Course and Program Setup

Planning and Setting Up Course Sessions

These topics discuss how to plan and setup course sessions.

Pages Used to Plan and Set Up Course Sessions

Page Name	***Definition Name***	***Usage***
Course Session Planner Page	CRS_SESS_PLAN1	Plan new course sessions and check availability of training rooms and instructors.
Crse Session Planner Facility (course session planner facility)	TRN_PLAN_FAC_SEC	Click **Room Number** in the Training Room Booked Time group box on the Course Session Planner page. View room booking details. All displayed data comes from the Course Session table.
Course Session Planner Instr. Page	TRN_PLAN_INSTR_SEC	View instructor schedules.
Course Session Profile Page	COURSE_SESSN_TBL1	Set up general information about the course session, including start and end dates, session length, number of students who can enroll in the session, and session language if the course is multilingual.
Course Sessions - Location, Instructor Page	COURSE_SESSN_TBL2A	Set up the location of the course session and the course instructor. If you are dividing the session into cut sessions, set up the start and end dates, location, and instructor for each cut session. Before using this page, set up training facilities on the Training Facility table. If you use external companies to manage course sessions, add them to the Vendor table. Add instructors to the Instructor table.
Training Facility Address Page	TRN_FACIL_ADDR_SEC	View and update the address and contact details of the course session or cut session.
Select Free Training Room Page	TRN_ROOM_SEL_SEC	Select a training room for the course session or cut session.
Select Free Instructor Page	TRN_INSTR_SEL_SEC	Select an instructor for the course session or cut session.

Page Name	***Definition Name***	***Usage***
Course Sessions - Equipment Page	COURSE_SESSN_TBL3A	Specify the equipment and materials that are required for the course session. You set up equipment codes on the Equipment and Materials page.
Training Facility Equipment Page	TRN_FAC_EQUIP_SEC	View the equipment and materials available at the training facility.
Course Sessions - Expense Page	COURSE_SESSN_TBL4A	Define miscellaneous expenses that are associated with a course session. Set up the Tuition Expense Type page before using this page.
Review Session Summary Page	TRN_CRS_STUDNT_SUM	View details of a course session, including the start and end dates, session location, and list of students.

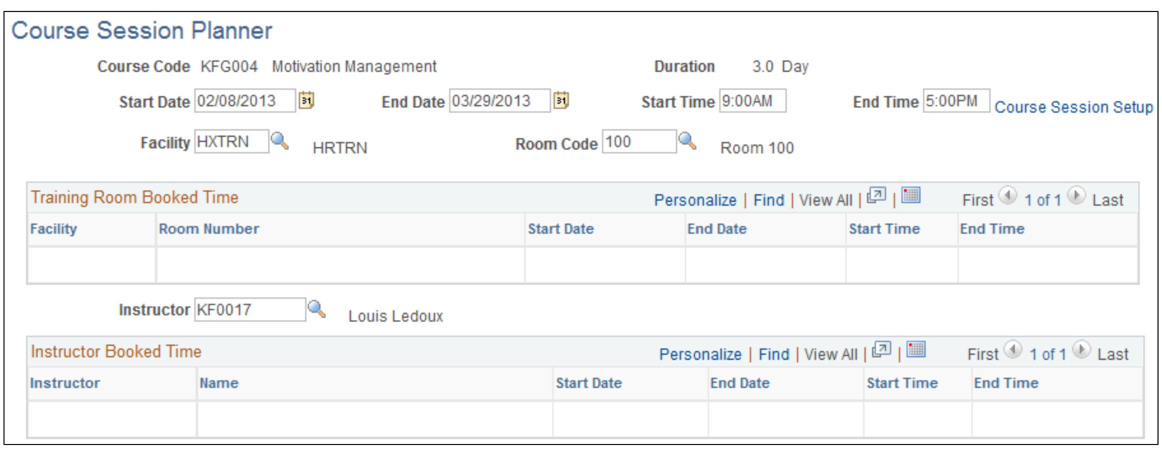
Course Session Planner Page

Use the Course Session Planner page (CRS_SESS_PLAN1) to plan new course sessions and check availability of training rooms and instructors.

Navigation:

Administer Training > **Define Course/Cost Details** > **Course Session Planner** > **Course Session Planner**

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



Field or Control	*Description*
Start Date and **End Date**	When you enter dates in these fields, the system updates the instructor grid with the qualified instructors who are booked during the specified period. If you have specified a facility, the system updates the facility grid with existing bookings. You can make this period as long as you want and then adjust the dates as you narrow the search for available instructors and training rooms. The system doesn't check instructor or facility availability until you select a start date. Before setting up the course session, you must complete both dates, because they become the course session start and end dates when you click **Course Session Setup.**
Start Time and **End Time**	The system displays these fields when you enter the end date. Enter the start and end times for the course session.
Course Session Setup	Click to set up the course session. The **Instructor** and **Facility** fields aren't mandatory, so you can set up a course session with just one of them completed. If you don't select an end date, or if the instructor or training room that you selected is booked, you can't click the link. When you click Course Session Setup, the system transfers you to the Course Session component and copies the data from the Course Session Planner page. When you save the Course Session component, the system returns to the Course Session Planner page.
Facility	Select a facility from the list. When you move out of the field, the system checks the Course Session Table for existing bookings and displays in the **Training Room Booked Time** group box the dates and times when training rooms at the facility are booked during the specified period. Click the **Room Number** link in that group box to check the Crse Session Planner Facility page for booking details. If the **Training Room Booked Time** group box is blank, the facility is available during the specified period.
Room Code	The system makes this field available for entry when you complete the **Facility** field. Select a room code from the list. When you leave the field, the system checks existing room bookings and updates the **Training Room Booked Time** group box to show the bookings for the selected room. If this group box is blank, there are no bookings for that room.

Field or Control	*Description*
Instructor	Select an instructor from the list. When you leave the field, the system checks the instructor's availability and lists in the **Instructor Booked Time** group box the dates and times that the instructor is unavailable during the specified period. Click the instructor's name in that group box to view the Course Session Planner Instr. page, where you can view the reason that the instructor is unavailable. The system also checks the instructor's training schedule and absence history. If the **Instructor Booked Time** group box is blank, the instructor is available for the specified period.
Room Number	Click the room number link to access the Crse Session Planner Facility page and view training facility information.
Name	Click the name link to access the Course Session Planner Instr. page and view instructor information.

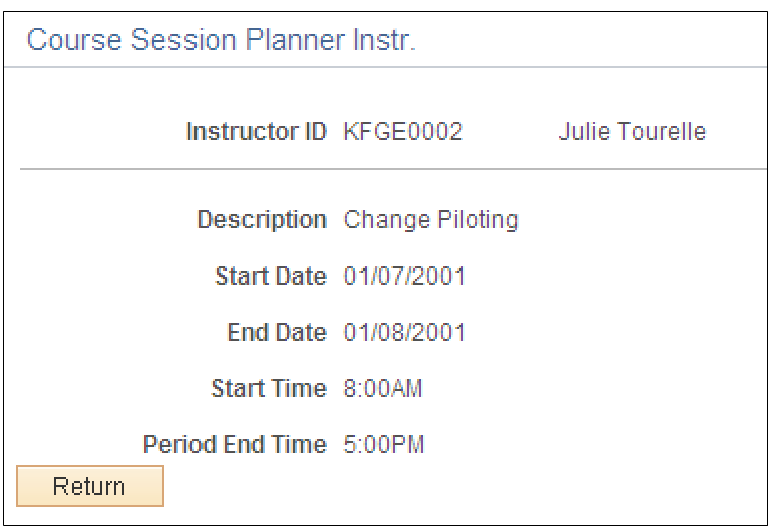
Course Session Planner Instr. Page

Use the Course Session Planner Instr. (course session planner instructor) page (TRN_PLAN_INSTR_SEC) to view instructor schedules.

Navigation:

Click **Instructor** name in the Instructor Booked Time group box on the Course Session Planner page.

This example illustrates the fields and controls on the Course Session Planner Instr. page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Description	If the instructor is scheduled to teach, the system displays the name of the course. Otherwise, the system displays the reason for the instructor's absence.

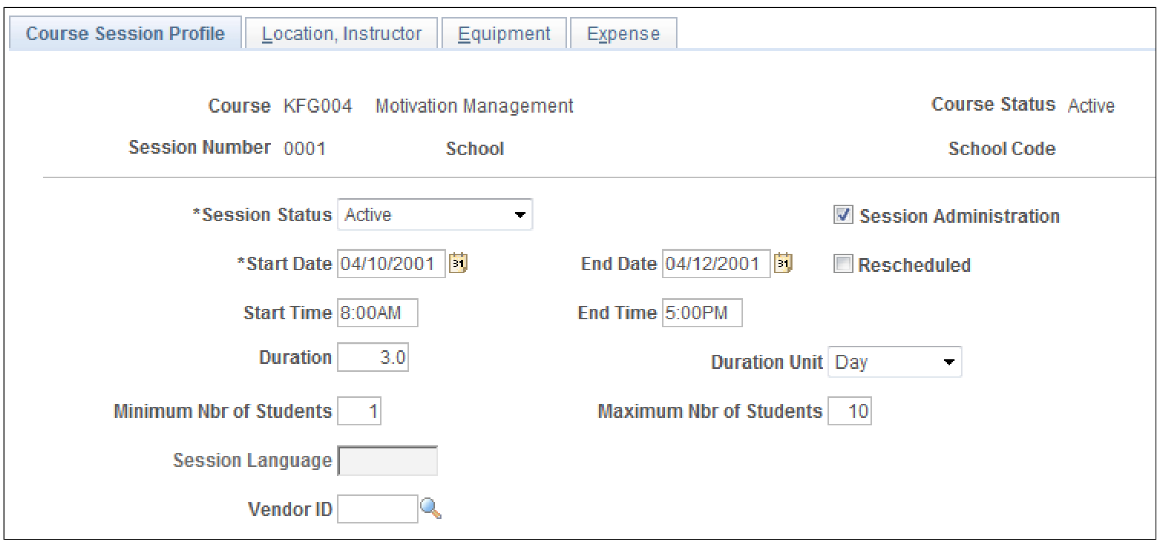
Course Session Profile Page

Use the Course Session Profile page (COURSE_SESSN_TBL1) to set up general information about the course session, including start and end dates, session length, number of students who can enroll in the session, and session language if the course is multilingual.

Navigation:

Administer Training > **Define Course/Cost Details** > **Course Sessions** > **Course Session Profile**

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



To set up course sessions, you must have created the course in the Course table, given it an Active status, and selected the **Session Administration** check box.

Field or Control	Description
Session Number	If you add a new session and leave this blank, a sequential session number is generated. You can reuse session numbers from completed or canceled sessions.

Field or Control	***Description***
Session Status	Select a status: *Active:* Select this default status when you create a new course session. You can enroll students only in active sessions. *Canceled:* Select if the session has been canceled. *Complete:* Select if the course session has been completed. This updates data for each enrollee.
Start Date, End Date, Start Time, and **End Time**	When you change the start or end date, the system updates the student training records for students who are on waiting lists or enrolled in course sessions. **Note:** (FRA) The system uses the session start date to determine the fiscal year in which costs are charged. If the session dates cover two fiscal years (that is, the start date is before December 31 and the end date is after January 1). Then, the costs may not occur properly and chargeable costs may not be reported correctly on the 2483 report. In this case, it is better to create two separate sessions.
Rescheduled	Select if you change session information, such as dates or times, so that you know that you've made changes to the original information. When you select this check box and save the page, the system changes the letter code in the student training record to *RSC* (reschedule). You can create a form letter to notify students of rescheduled sessions.
Session Administration	When selected, this session appears in the search results for the Enroll Individually component (COURSE_ENROLLMENT1) if it meets the search criteria. You must select this check box to enroll learners in this session by using the Enroll Individually component. The system selects this check box by default, but you can deselect it.
Duration and **Duration Unit**	Automatically populated from the Course table. You can change these values.
Minimum Nbr of Students and **Maximum Nbr of Students** (minimum number of students and maximum number of students)	Automatically populated from the Course table. If you're enrolling students in this session using the Course Auto Enrollment page, enter a number in the **Maximum Nbr of Students** field—otherwise the system can't enroll any students in the course. If you select a training facility code on the Course Session Table - Location, Instructor page, the system validates the number that you enter in the **Maximum Nbr of Students** field against the room's maximum capacity.

Field or Control	Description
Session Language	This field is available if the course is designated as multilingual on the Course Table - Course Profile page.
Vendor ID	Select a vendor ID if you're outsourcing any part of a session to a vendor. Vendor IDs are stored in the Vendor table.

Related Links

Closing Completed or Canceled Sessions

Course Sessions - Location, Instructor Page

Use the Course Sessions - Location, Instructor page (COURSE_SESSN_TBL2A) to set up the location of the course session and the course instructor.

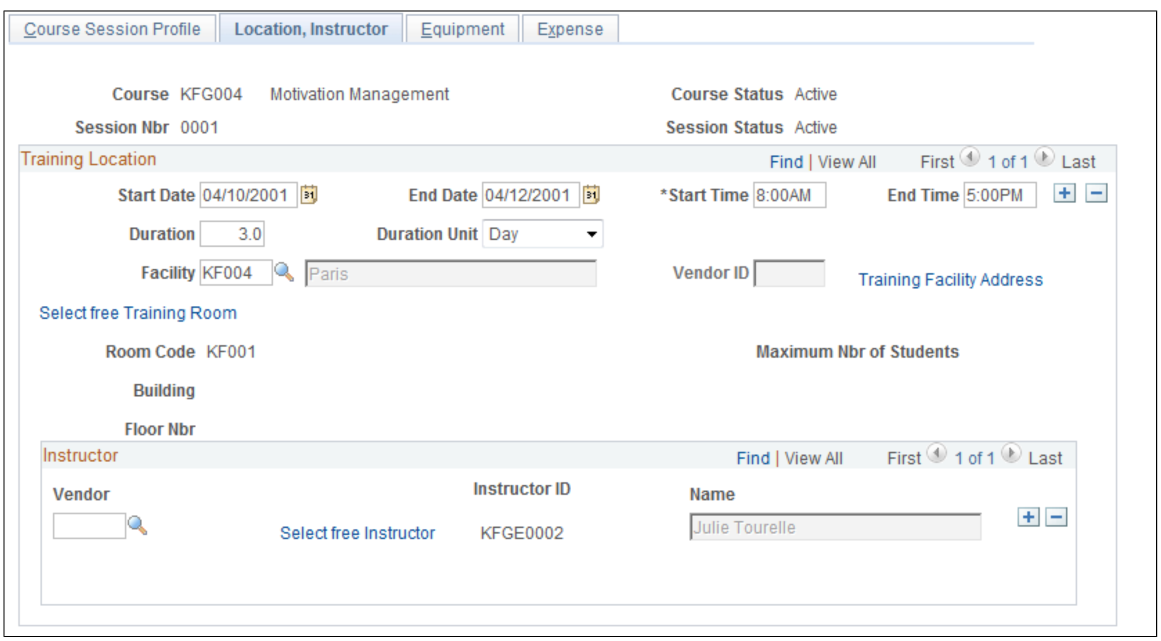
If you are dividing the session into cut sessions, set up the start and end dates, location, and instructor for each cut session.

Before using this page, set up training facilities on the Training Facility table. If you use external companies to manage course sessions, add them to the Vendor table. Add instructors to the Instructor table.

Navigation:

Administer Training > **Define Course/Cost Details** > **Course Sessions** > **Location, Instructor**

This example illustrates the fields and controls on the Course Sessions - Location, Instructor page. You can find definitions for the fields and controls later on this page.



Training Location

This scroll area contains details about all course session locations. You can select a training facility from the Training Facility table or specify a vendor if the course is at an external site.

Field or Control	*Description*
Start Date, End Date,Start Time, and **End Time**	Displays the course session dates and times. If the course session is divided into cut sessions, insert a row for each session, adjust the dates for each row, and adjust the times, if they vary.
Duration and **Duration Unit**	Automatically populated from the Course Session Table - Course Session Profile page. If the course session is divided into cut sessions, adjust for each cut session. Make sure that the duration of all cut sessions equals that of the course session.
Facility	If the session is at a facility that you set up in the Training Facility table, select the appropriate facility. When you leave this field, the system completes the facility name fields; you can't change them. If the training facility isn't set up in the Training Facility table, leave this field blank.
Vendor ID	If a vendor is managing the course session, select a vendor ID. When you leave this field, the system enters the vendor name.
Select free Training Room	Click this link to access the Select Free Training Room page. The system displays rooms that are available during the specified period. If the Facility field is blank, this link is unavailable. After you select a room on the Select Free Training Room page, the room code, room name, building, floor number, and maximum number of students appear on the Course Sessions - Location, Instructor page. (The building and floor number are optional fields on the Training Facility Table - Training Rooms page and only appear if applicable.)
Training Facility Address	Click to access the Training Facility Address page, which displays the address of the selected facility or vendor. If the Facility and Vendor ID fields are blank, the Training Facility Address page is blank.

Instructor

Field or Control	***Description***
Vendor	If the instructor is from a vendor, select the vendor ID. When you leave this field, the system displays the vendor name.
Select free Instructor	Click this link to access the Select Free Instructor page. The system displays qualified instructors who are available during the specified period. After you select an instructor, the instructor ID and name appear on the Course Sessions - Location, Instructor page.

Training Facility Address Page

Use the Training Facility Address page (TRN_FACIL_ADDR_SEC) to view and update the address and contact details of the course session or cut session.

Navigation:

Click **Training Facility Address** on the Course Sessions - Location, Instructor page.

This example illustrates the fields and controls on the Course Sessions - Training Facility Address page. You can find definitions for the fields and controls later on this page.

The system completes fields on this page from the Training Facility table or the Vendor table, depending on the selections on the Course Session Table - Location, Instructor page.

Field or Control	***Description***
Contact Name	Enter the name of a contact at the training facility. If you selected a facility on the Course Session Table - Location, Instructor page, the system displays the contact name from the Training Facility Table - Contacts and Equipment page. You can update the name.
Phone	Enter the telephone number of the person named in Contact Name. If the person has a business phone number specified, the system completes the Phone field automatically. You can update the number.
Country	If you selected a training facility or a vendor on the Course Session Table - Location, Instructor page, the system completes the Country and address fields, making them unavailable for entry. If the Country field is blank, select from the list of valid values. When you leave the field, the system dynamically generates that country's proper address format, as specified on the Country Table, Address Format page.

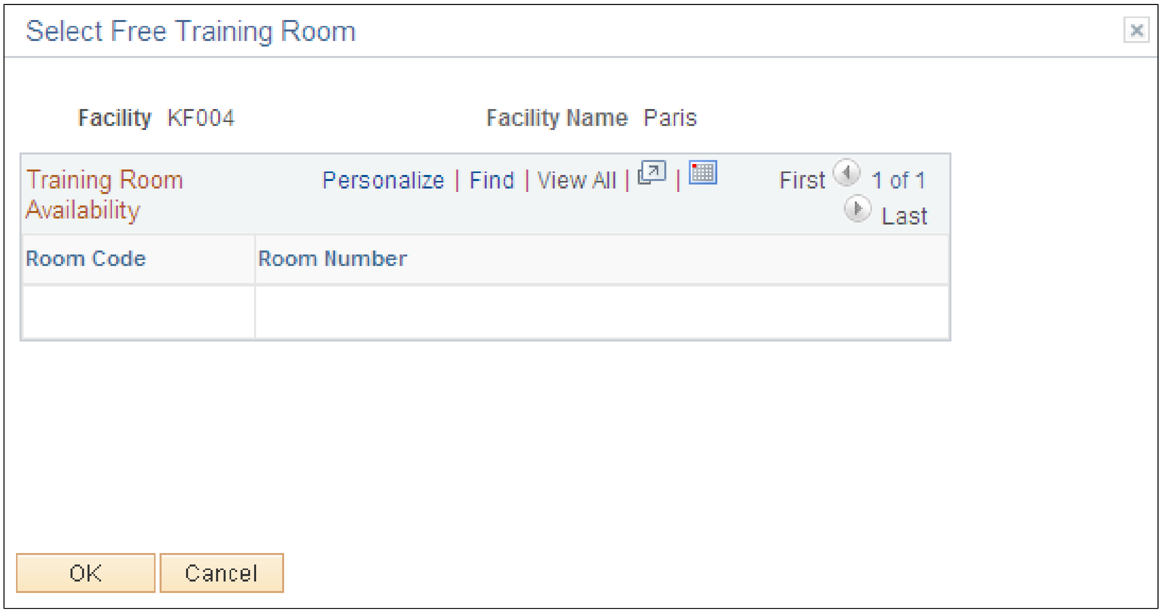
Select Free Training Room Page

Use the Select Free Training Room page (TRN_ROOM_SEL_SEC) to select a training room for the course session or cut session.

Navigation:

Click **Select free Training Room** on the Course Sessions - Location, Instructor page.

This example illustrates the fields and controls on the Select free Training Room page. You can find definitions for the fields and controls later on this page.



The system displays the rooms that meet these criteria:

- The room is available during the period that you specified on the Course Session Table - Location, Instructor page.
- The room can accommodate the maximum number of students that you specified on the Course Session Table - Course Session Profile page.

Field or Control	***Description***
Room Code	Select a check box to book the associated training room for the course session or cut session.
Room Nbr (room number)	System displayed. You set up training rooms in the Training Facility Table page.

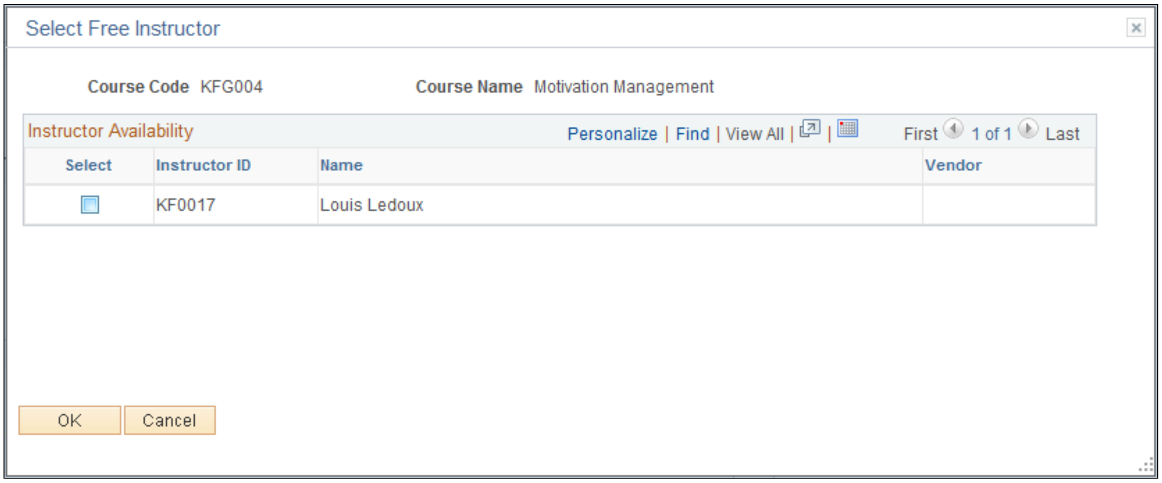
Select Free Instructor Page

Use the Select Free Instructor page (TRN_INSTR_SEL_SEC) to select an instructor for the course session or cut session.

Navigation:

Click **Select free Instructor** on the Course Sessions - Location, Instructor page.

This example illustrates the fields and controls on the Course Sessions - Select Free Instructor page. You can find definitions for the fields and controls later on this page.



The system includes displays instructors who are:

- Qualified to teach the course.

  You use the Instructor Table - Qualification page to define the courses that an instructor can teach. If the course is multilingual, the system checks the instructor's language skills. Only instructors who can teach in the language you specified on the Course Session Table - Course Session Profile page are on the list. Record instructors' language abilities in their profile. The system checks instructor's PERSON profile type only. Profiles are defined in the Manage Profiles business process

- Available during the period that you specified on the Course Session Table - Location, Instructor page.

  The system checks the instructor's teaching schedule and absence data. This prevents you from scheduling instructors during planned absence periods, such as vacations.

Field or Control	***Description***
Select	Select a check box to book the associated instructor for the course session or cut session.
Instructor ID and **Name**	System displayed. You set up instructors on the Instructor Table - Instructor Profile page.

Related Links

"Understanding Profile Management" (PeopleSoft Human Resources Manage Profiles)

Course Sessions - Equipment Page

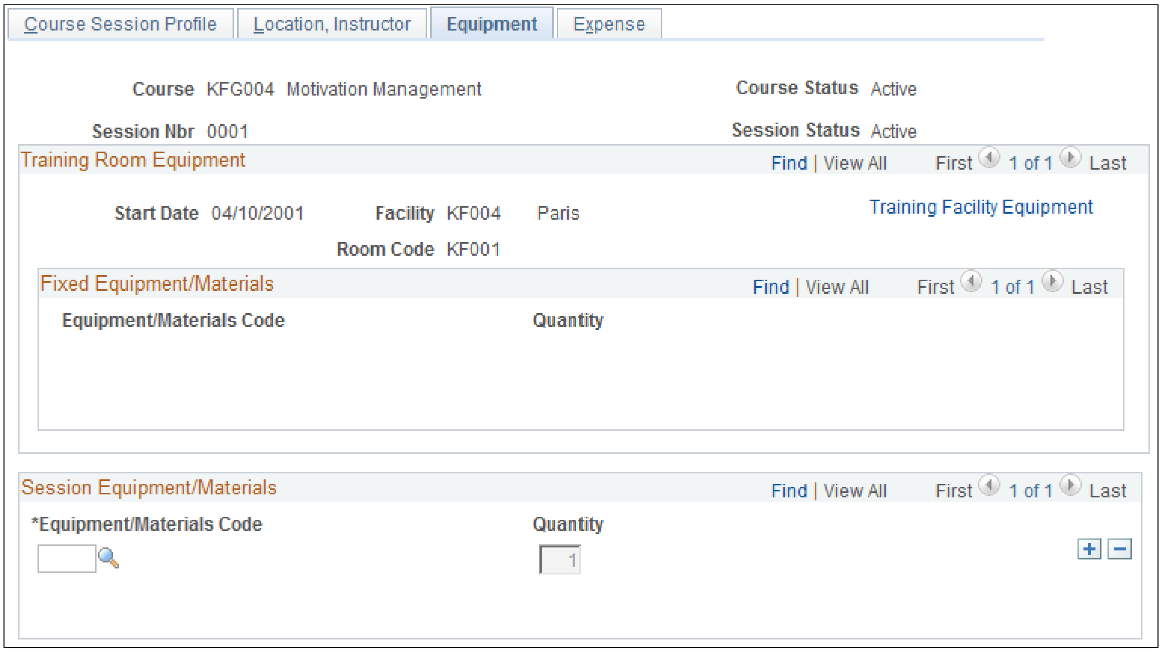
Use the Course Sessions - Equipment page (COURSE_SESSN_TBL3A) to specify the equipment and materials that are required for the course session.

You set up equipment codes on the Equipment and Materials page.

Navigation:

Administer Training > **Define Course/Cost Details** > **Course Sessions** > **Equipment**

This example illustrates the fields and controls on the Course Sessions - Equipment page. You can find definitions for the fields and controls later on this page.



Training Room Equipment

This scroll area displays details of the training facility that you selected on the Course Session Table page. If you divided the course session into cut sessions, check the details of the training facility for each cut session.

Field or Control	***Description***
Training Facility Equipment	Click to display the shared equipment that is available at the training facility. If you haven't specified a facility, this link is unavailable.

Fixed Equipment/Materials

If you selected a training facility code on the Course Session Table - Location, Instructor page, the system displays the fixed equipment available in the selected training room. Facility equipment is defined on the Training Facility Table - Training Rooms page.

Session Equipment/Materials

Use this scroll area to specify the equipment and materials required for the course session. The list is initially populated by the Course Cost - Vendor, Facility, and Equipment page.

Field or Control	*Description*
Equipment/Materials Code (equipment code)	You set up equipment or material codes on the Equipment and Materials page. If you selected a training facility on the Course Session Table - Location, Instructor page, you don't need to include the fixed equipment shown in the Fixed Equipment/Materials scroll area.

Note: To find out whether the equipment required for the course session is available at the training facility, generate the Equipment Checklist report.

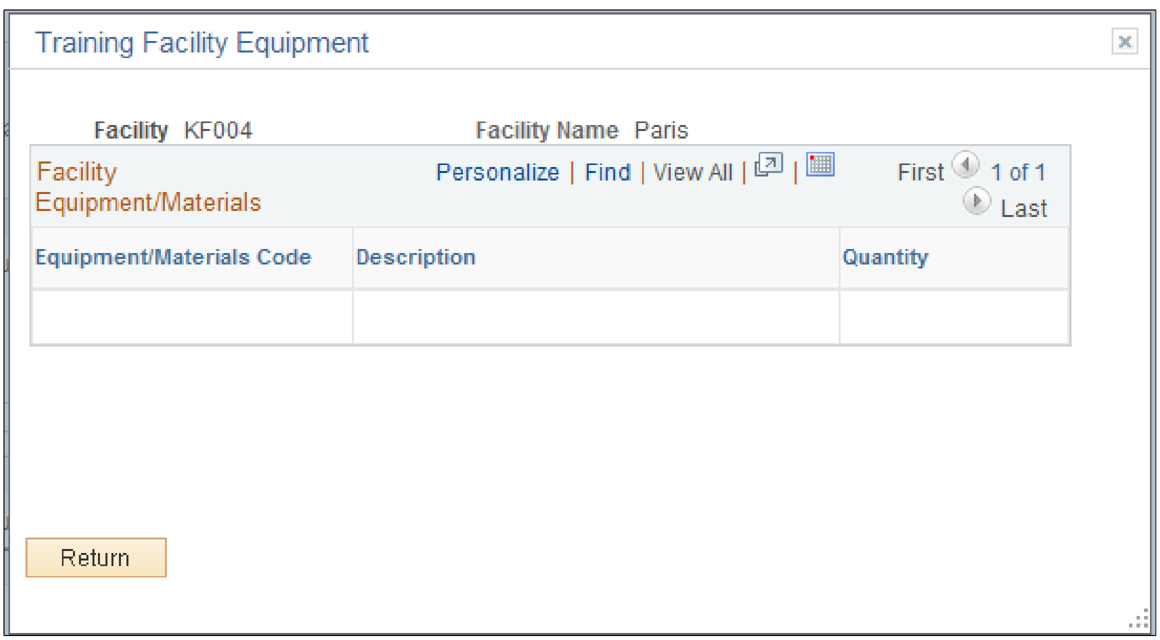
Training Facility Equipment Page

Use the Training Facility Equipment page (TRN_FAC_EQUIP_SEC) to view the equipment and materials available at the training facility.

Navigation:

Click the **Training Facility Equipment** link on the Course Sessions - Equipment page.

This example illustrates the fields and controls on the Course Sessions - Training Facility Equipment page. You can find definitions for the fields and controls later on this page.



This group box lists the equipment that is available at the training facility. It includes only equipment that is shared among training rooms, not the fixed equipment associated with individual training rooms. Define training facility equipment on the Training Facility Table - Contacts and Equipment page.

Course Sessions - Expense Page

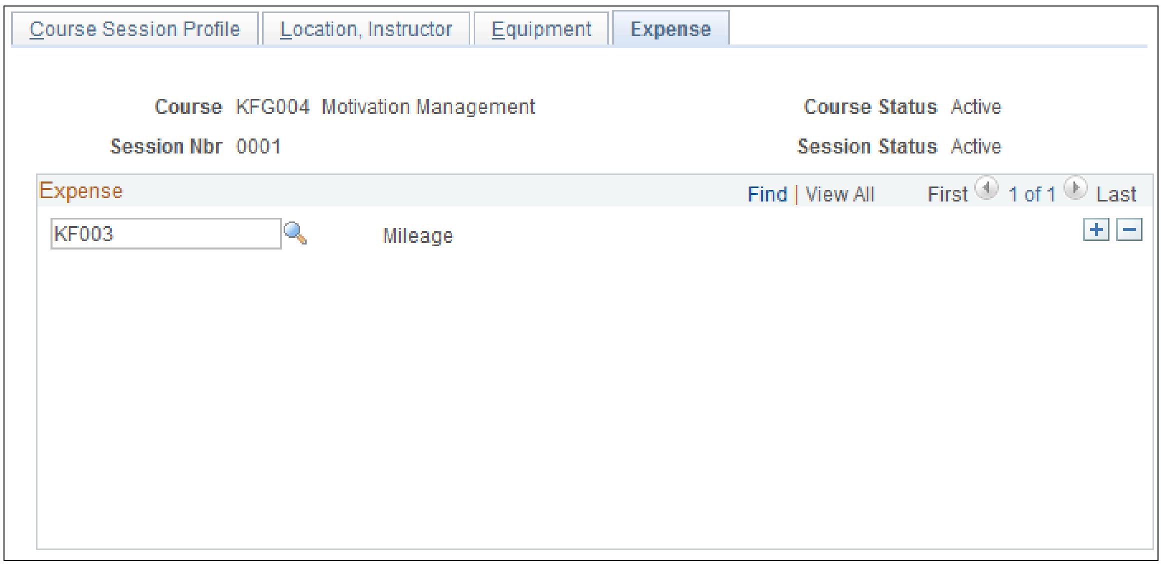
Use the Course Sessions - Expense page (COURSE_SESSN_TBL4A) to define miscellaneous expenses that are associated with a course session.

Set up the Tuition Expense Type page before using this page.

Navigation:

Administer Training > **Define Course/Cost Details** > **Course Sessions** > **Expense**

This example illustrates the fields and controls on the Course Sessions - Expense page. You can find definitions for the fields and controls later on this page.



Use this scroll area to list the types of expenses that are associated with this course session. The list is initially populated by fields from the Course Cost - Instructor, Expense page.

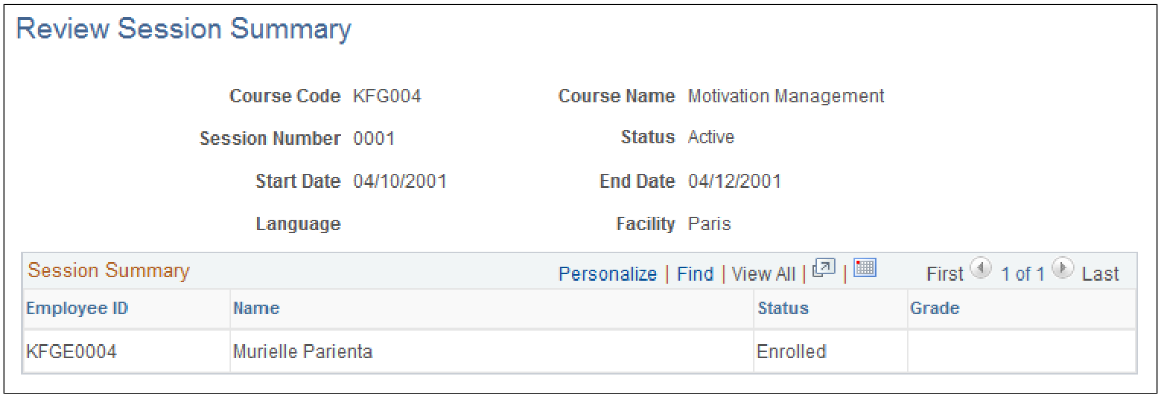
Review Session Summary Page

Use the Review Session Summary page (TRN_CRS_STUDNT_SUM) to view details of a course session, including the start and end dates, session location, and list of students.

Navigation:

Administer Training > **Result Tracking** > **Review Session Summary** > **Review Session Summary**

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



If the course session hasn't ended, the system shows who is enrolled or wait listed. If the course session has ended, the system shows which students completed the course and what their grades were.

All data that the system displays on the Review Session Summary page comes from the Course Session table.

Field or Control	***Description***
Status	Displays the session status: *Active:* The default status when you add a new session. *Canceled:* The session has been canceled. *Complete:* The course session has completed.
Grade	If a student has successfully completed the course, the system displays the student's grade. Enter grades on the Student Training - Course Student Enrollment page.

Setting Up Course Session Costs

Different sessions of the same course might have different costs, if a course is taught in multiple geographical areas or facilities, for example. If you defined general course costs in the Course Cost table, you can modify them at the session level.

These topics discuss how to setup the course session costs.

Note: Establish costs for training facilities only if you use training budgets.

Note: The annuity factor must be set before entering costs.

Pages Used to Set Up Course Session Costs

Page Name	***Definition Name***	***Usage***
Course Session Costs - Vendor Page	CRS_SESSN_TBL5_GBL	Enter vendor costs for a course session. Vendor costs are set up in the Course Session table.
Course Session Costs - Facility, Instructor Page	CRS_SESS_TBL6A_GBL	Set up session costs that are associated with the facility and instructor. If you divided the course session into cut sessions, enter costs for each cut session.
Course Session Costs - Equipment Page	CRS_SESS_TBL7A_GBL	Record costs that are associated with course equipment.
Course Session Costs - Expense Page	CRS_SESSN_TBL8_GBL	Record costs associated with session expenses. You can enter costs only for the expense types that you specified on the Course Session Table - Expense page.

Related Links

Understanding Training Cost Units

Course Session Costs - Vendor Page

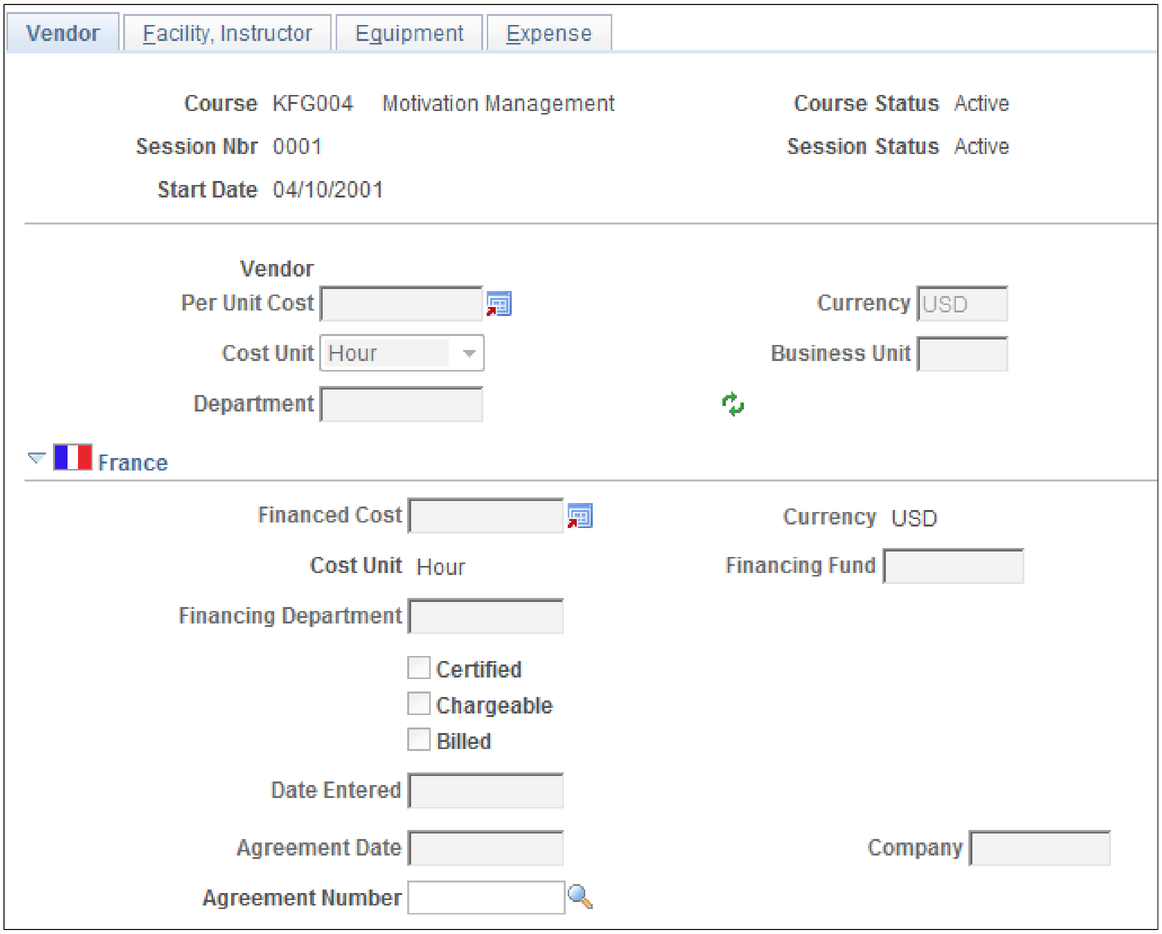
Use the Course Session Costs - Vendor page (CRS_SESSN_TBL5_GBL) to enter vendor costs for a course session.

Vendor costs are set up in the Course Session table.

Navigation:

Administer Training > **Define Course/Cost Details** > **Course Session Costs** > **Vendor**

This example illustrates the fields and controls on the Course Session Costs - Vendor page. You can find definitions for the fields and controls later on this page.



If the vendor manages all training requirements—such as facilities, equipment, and instructors—for a single cost, you need only enter that amount here, without providing information on the other pages in this component.

Field or Control	***Description***
Per Unit Cost	Enter for the vendor that is associated with this course session. Select a currency if it is not the default currency. If you didn't specify a vendor for this course session, this field isn't available. Specify the default currency for business units for a budget period on the Budget Information table. Budgets are automatically converted to the default base currency that you established on the Exchange Rate table (TRN_BASE_CURRENCY).

Field or Control	***Description***
Cost Unit	Select the unit that is associated with the amount in the **Per Unit Cost** field; for example: *Hour:* To track hourly charges. *Day:* If the vendor bills by the day.
Refresh	Click the Refresh button to display the default values from the Vendor Setup page.

Note: If you don't enter business unit and department information on this page, the system looks at the employee's record for this course session on the Enroll Individually page (COURSE_ENROLLMENT) when it processes student costs.

(FRA) France

You define additional course session cost financing information for 2483 report requirements.

Field or Control	***Description***
Certified	Select if the vendor administering the course session is government-certified.
Chargeable	Select to make the training course a chargeable item for the 2483 report. When selected, related costs that you entered are reported in the 2483 report. This is used to meet French legal reporting requirements. The default value derives from the chargeable flag set in the Course Profile page and by the Compute Student Cost process.
Billed	Select to include the vendor cost in the 2483 report. Deselect the check box to track the cost but not have it included in the 2483 report.
Date Entered	Enter the date that the agreement between the vendor and the government body was recorded in the system.
Agreement Date	Enter the start date for the agreement between the vendor and the government body.
Company	Select the government body that the vendor has an agreement with.

Field or Control	***Description***
Agreement Number	The Agreement number is the number assigned between the two parties.

Related Links

Calculating and Maintaining Student Costs

Understanding the French Training Report 2483 Process

Course Session Costs - Facility, Instructor Page

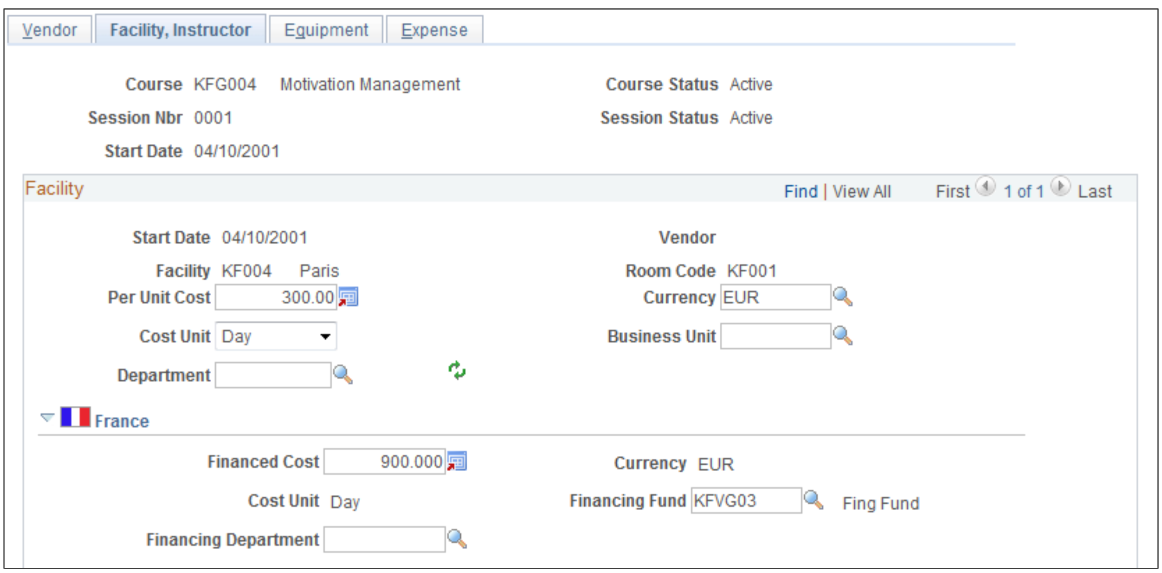
Use the Course Session Costs - Facility, Instructor page (CRS_SESS_TBL6A_GBL) to set up session costs that are associated with the facility and instructor.

If you divided the course session into cut sessions, enter costs for each cut session.

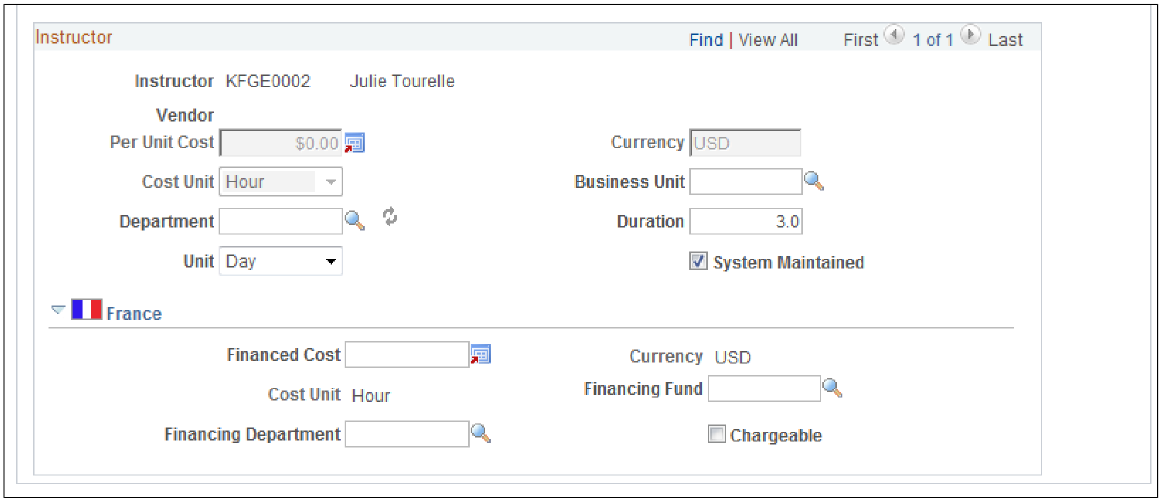
Navigation:

Administer Training > **Define Course/Cost Details** > **Course Session Costs** > **Facility, Instructor**

This example illustrates the fields and controls on the Course Session Costs - Facility, Instructor page (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Course Session Costs - Facility, Instructor page (2 of 2). You can find definitions for the fields and controls later on this page.



Facility

This data comes from the Course Session table. If you didn't specify a training facility, the fields are unavailable. If you divided the course session into cut sessions, enter facility costs for each cut session.

Field or Control	***Description***
Vendor	If the session is at a vendor site, this field is unavailable.
Per Unit Cost	Enter for the facility where the session is held. You can update the cost currency. Specify the default currency for business units for a budget period on the Budget Information table. Budgets are automatically converted to the default base currency that you establish on the Exchange Rate table (TRN_BASE_CURRENCY).
Cost Unit	Select the unit in which the facility's per unit cost amount is measured. For example, if you're tracking hourly charges, select *Hour*.
Refresh button:	Click the Refresh button to display the default values from the Facility Setup table.

Note: If you don't enter business unit and department information here, the system looks at the employee's record for this course session on the Enroll Individually page (COURSE_ENROLLMENT) when it computes the costs for budget processing.

Instructor

Instructor data is populated from the Course Session Table - Location, Instructor page. Instructor costs are populated from the Instructor Table - Instructor Profile page. If instructors aren't specified, the fields are unavailable.

If you divided the course session into cut sessions, enter instructor costs for each cut session.

Field or Control	***Description***
Instructor	Displays information from the Course Session table. If the instructor is internal, the cost is defaulted from the costs defined on the Trainees Salary Costs page. If the instructor is external, the cost is defaulted from the Instructor Setup table located on the **Set Up HCM** > **Product Related** > **Learning** > **Instructors** page. **Note: Paid Hours** is the cost unit for an internal instructor. This cost unit is useful when computing chargeable costs. You can compute the chargeable cost this way: Per Unit Costs = Employee Salary * Session Duration / Paid Hours. The system derives the Paid Hours value from the Trainees Salary Costs page. When the instructor is full-time, defined on the Instructor Setup page, then the system informs the user that the full—time instructor should not be reported at the session level but at the company level (on the Trn 2483 Parameters Setup page).
Vendor	If the instructor works for a vendor, the system displays the vendor ID, and the field is unavailable. If the instructor isn't from a vendor, the field is blank.
Per Unit Cost	Enter the cost for the instructor associated with this session. In the next field, the default currency appears. You can select a different currency.
Cost Unit	Select the unit in which the instructor's per unit cost amount is measured. For example, if the instructor is paid a daily rate, select *Daily.*
Refresh button	Click the Refresh button to display the default values from the Course Session Costs—Facility, Instructor page.

Field or Control	***Description***
Duration and **Unit**	These values are populated from the Course Session table. Update them if the instructor costs don't match the session duration. For example, if the session duration is 2.5 days but the instructor charges for 3 days, update the **Duration** field to *3* days. Updating this field doesn't change the data in the Course Session table.
System Maintained	When this option is selected it pertains only to internal instructors and the Per Unit Cost field is deactivated. In this case, the Compute Student Costs process gets salary costs defined on the Trainees Salary Cost page. When **System Maintained** is deactivated, you can specify the cost on this page and the Compute Student Costs process use this page to compute the instructor chargeable cost.
(FRA) Chargeable	Select to make the training course a system chargeable item for the 2483 report. When selected, related costs are entered into the 2483 report. This is used to meet French legal reporting requirements. The default value of the chargeable flag set in the Course Setup page and by the Compute Student Costs process.

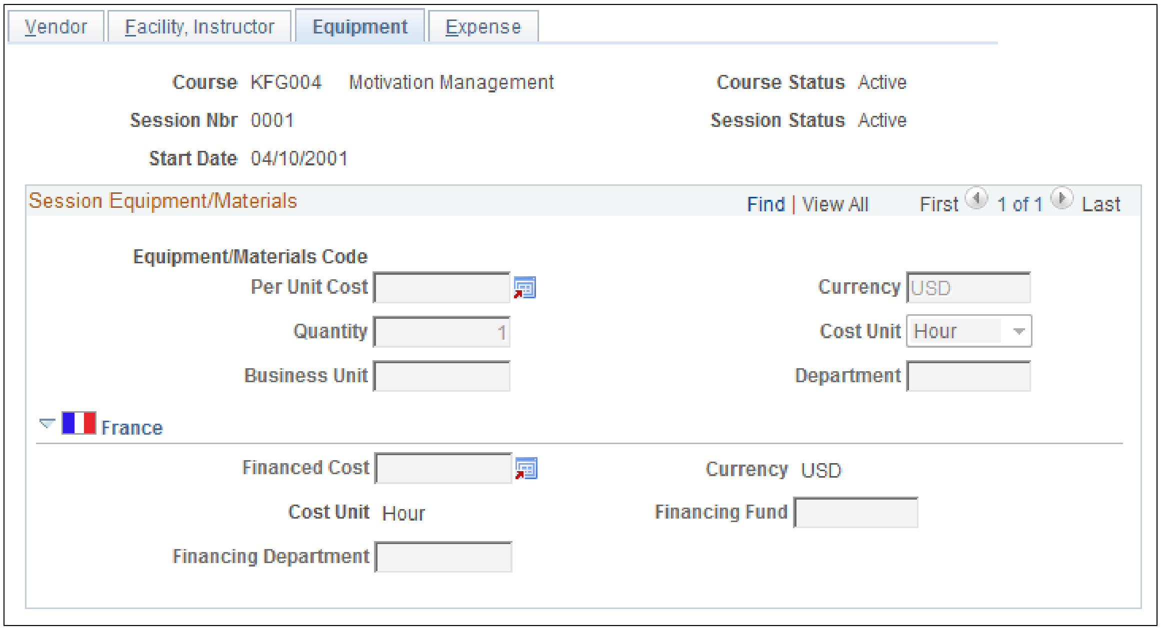
Course Session Costs - Equipment Page

Use the Course Session Costs - Equipment page (CRS_SESS_TBL7A_GBL) to record costs that are associated with course equipment.

Navigation:

Administer Training > **Define Course/Cost Details** > **Course Session Costs** > **Equipment**

This example illustrates the fields and controls on the Course Session Costs - Equipment page. You can find definitions for the fields and controls later on this page.



The system gets equipment and materials data from the Course Session table. To update or modify information, use the Course Session Table - Equipment page.

If you didn't specify equipment or materials for this course session, the fields are unavailable.

Field or Control	Description
Per Unit Cost	Enter an amount for the item specified by the equipment code. Select a cost currency to change the default for this cost. Specify the default currency for business units for a budget period on the Budget Information table. Budgets are automatically converted to the default base currency that you establish on the Exchange Rate table (TRN_BASE_CURRENCY).
Quantity	Initially populated by the Course Session table. If you enter a new quantity and save the changes, the system updates the data in the Course Session table.

Note: If you don't enter business unit and department information here, the system looks at the employee's record for this course session on the Enroll Individually page (COURSE_ENROLLMENT) when it computes the costs for budget processing.

Course Session Costs - Expense Page

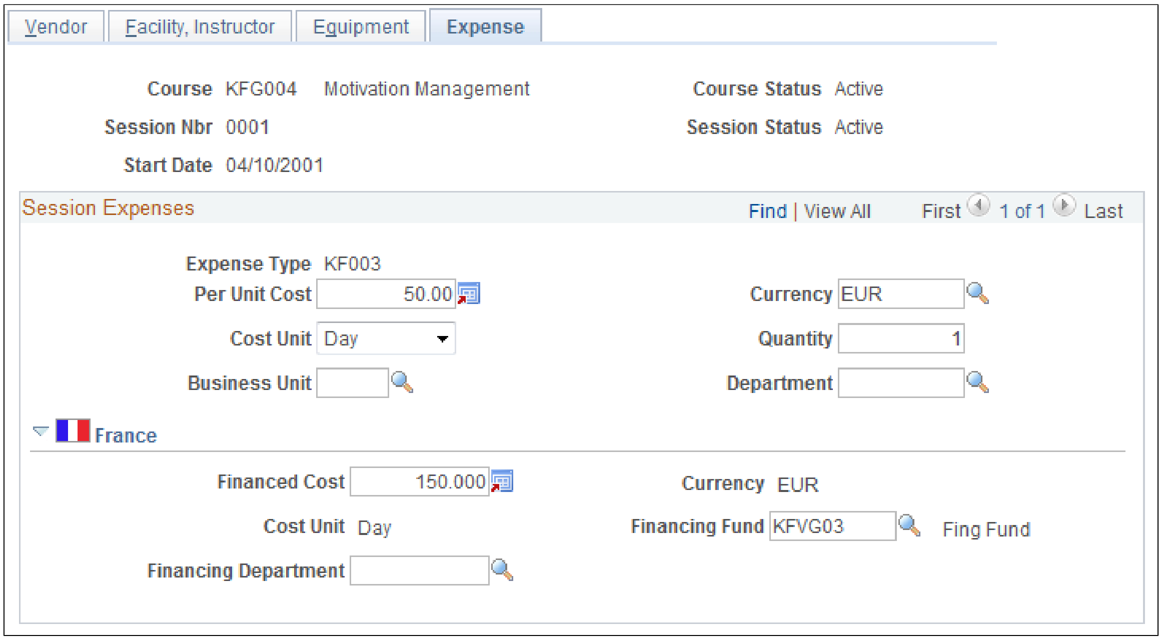
Use the Course Session Costs - Expense page (CRS_SESSN_TBL8_GBL) to record costs associated with session expenses.

You can enter costs only for the expense types that you specified on the Course Session Table - Expense page.

Navigation:

Administer Training > **Define Course/Cost Details** > **Course Session Costs** > **Expense**

This example illustrates the fields and controls on the Course Session Costs - Expense page. You can find definitions for the fields and controls later on this page.



Before entering cost information for course session expenses, associate the expenses with a course session on the Course Session Table - Expense page. If you didn't specify expenses for this session, the Per Unit Cost and currency fields are unavailable.

Field or Control	***Description***
Per Unit Cost	Enter a per unit cost for each expense type that is associated with this course session. The default currency is displayed; you can select a different currency. Specify the default currency for business units for a budget period on the Budget Information table. Budgets are automatically converted to the default base currency that you establish on the Exchange Rate table (TRN_BASE_CURRENCY).
Cost Unit	Select the unit in which the per unit cost amount is measured. For example, if you're tracking hourly charges for parking, select *Hour;* if you reimburse a flat rate for parking, choose *Flat Cost.*

Field or Control	*Description*
Business Unit	If you're entering information for more than one expense, you can specify that each one be billed to a different business unit and department.

Note: If you don't enter business unit and department information here, the system looks at the employee's record for this course session on the Enroll Individually page (COURSE_ENROLLMENT) when it computes the costs for budget processing.

Closing Completed or Canceled Sessions

Once a course session has taken place—or when you cancel a session—you need to indicate that the session is closed.

To close or cancel a course session:

1. Select the course session from the Course Session table.

   Access the Course Session Table - Course Session Profile page **(Administer Training > Define Course/Cost Details > Course Sessions > Course Session Profile)** and select the session from the list of active sessions.

2. Change the session status to *Complete,* if the session has finished, or *Canceled,* to cancel it.

- If you set the session status to *Complete,* a message appears when you save the changes, and the system updates:
  - Student training profiles.

    The profiles show that the students enrolled in this session have completed this course.
  - Student profiles.

    The system assigns the competencies and accomplishments that are defined on the Course Table - Prereqs, Goals page to the students who completed the course. The system updates students' profile of type PERSON. If the student doesn't have a profile of type PERSON, the system automatically creates a profile and assigns the course competencies and accomplishments.

- If you set the session status to *Cancel* the system updates the student automatically and inserts the letter code of CAN (cancellation) so that you can generate letters notifying students of the session cancellation. You can create letter codes on the Standard Letter Table page.

Once you've set the **Session Status** field to *Complete* or *Canceled,* you can no longer use the course session during enrollment and rescheduling.

If any students are on a waiting list for a canceled or completed session, put the students back on the waiting list so that you can enroll them in other sessions.

If you have students with a status of Session Wait list, use the Create/Update Course Wait List page to add them to the waiting list.

Prerequisites When Using Profile Management Competencies and Accomplishments

When you have defined a course using competencies or accomplishments, the following configurations are required before you can set the session status to *Complete:*

- Configure the application server for publish/subscribe.
- Configure the integration broker and make it active.

  Ensure that the:

  - The EOEN_MSG_CHNL queue is running.
  - The service operation EOEN_MSG is active.
  - The associated routing definitions are active.

- Set up the Event Manager.

  Make the event CourseSessionCompleted and the associated event handlers active. You should also enable logging for the event and handler.

See product information for *PeopleTools: Integration Broker Service Operations Monitor* and *PeopleTools: System and Server Administration*.

Related Links

Generating Student Form Letters
Planning and Setting Up Course Sessions

Recording Student Feedback

These topics discuss how to record and enter student feedback.

Pages Used to Record Student Feedback

Page Name	***Definition Name***	***Usage***
Evaluate Course Session Page	COURSE_EVALUATNS	Record student feedback on course sessions so that you know what areas need improvement.

Page Name	***Definition Name***	***Usage***
(USF) Individual Training Evaluation - Course Information Page	GVT_TRNREQ_SEC_CE1	Enter general information about the course, including the start and end date of the course session and the course hours. Indicate each employee's completion status, grade, and overall rating of the course.
Individual Training Evaluation - Evaluation Data Page	GVT_TRNREQ_SEC_CE2	Record an employee's feedback about various areas of the course such as course materials, applicability of the course, and training facilities.
Individual Training Evaluation - Comments	GVT_TRNREQ_SEC_CE3	**Administer Training** > **Result Tracking** > **Individual Training Evaluation** > **Comments** Enter employee comments about strong or weak aspects of the training. Enter employee recommendations.

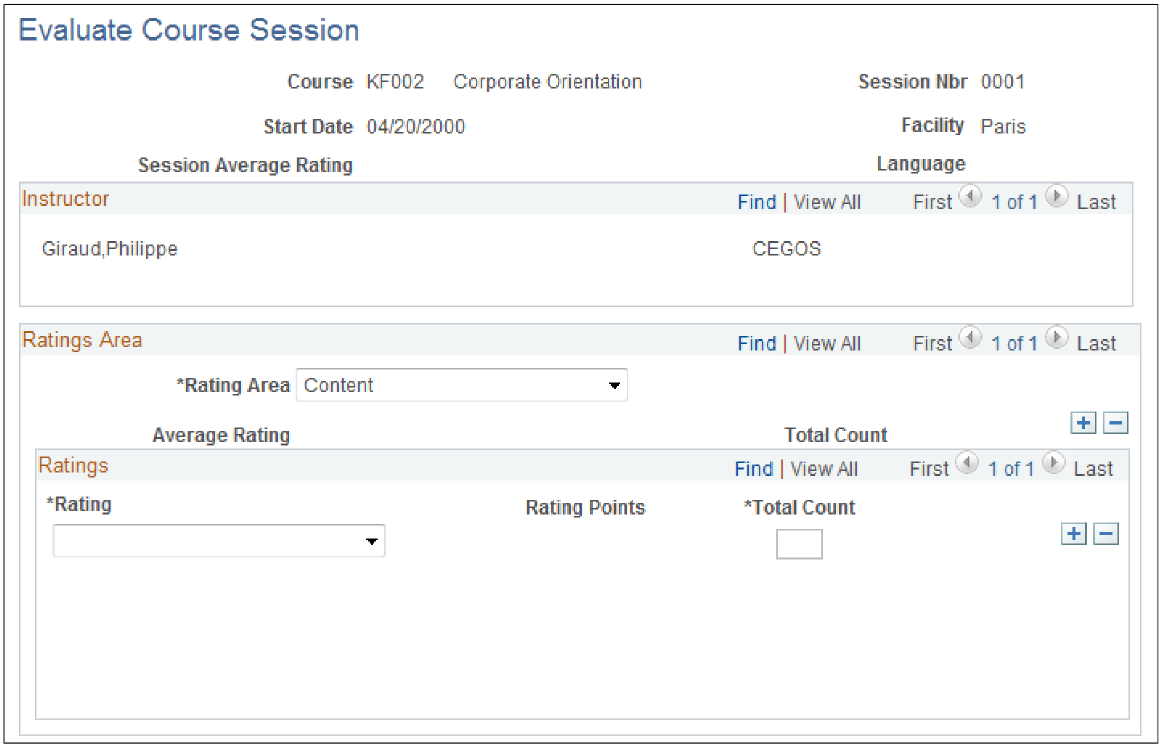
Evaluate Course Session Page

Use the Evaluate Course Session page (COURSE_EVALUATNS) to record student feedback on course sessions so that you know what areas need improvement.

Navigation:

Administer Training > **Result Tracking** > **Evaluate Course Session** > **Evaluate Course Session**

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



If you entered a facility and instructor in the Course Session table, the system displays the information here.

Field or Control	***Description***
Session Average Rating	Displays the overall average rating for the session. This is the average of the **Average Rating** values for all rating areas.

Ratings Area

Field or Control	***Description***
Rating Area	Select from *Content, Facility, Instructors, Materials,* or *Presentation.*
Average Rating	Displays the average rating for the area.
Total Count	Displays the number of evaluations received for the rating area. This is the sum of the **Total Count** fields in the **Ratings** scroll area.

Ratings

Use this scroll area to enter student evaluations of the specified rating area. Add a row for each rating level. For example, if four students evaluate the Content area of the course session, with three students giving a rating of *Excellent* and one student giving a rating of *Good,* you add one row to record the number of *Excellent* ratings and one row for the *Good* ratings.

Field or Control	***Description***
Rating Points	Displays the number of points associated with the rating you selected. The points associated with each rating are: *1:* Excellent *2:* Good *3:* Fair *4:* Poor
Total Count	Enter the number of students who gave each rating.

(USF) Individual Training Evaluation - Course Information Page

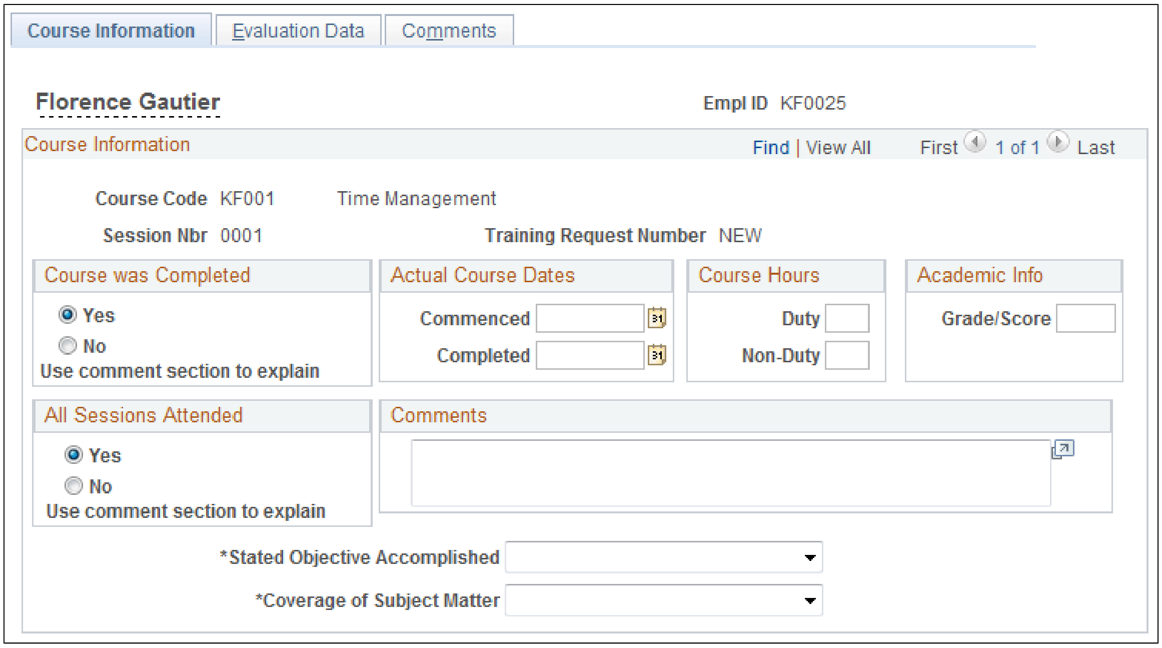
Use the Individual Training Evaluation - Course Information page (GVT_TRNREQ_SEC_CE1) to enter general information about the course, including the start and end date of the course session and the course hours.

Indicate each employee's completion status, grade, and overall rating of the course.

Navigation:

Administer Training > **Result Tracking** > **Individual Training Evaluation** > **Course Information**

This example illustrates the fields and controls on the Individual Training Evaluation - Course Information page. You can find definitions for the fields and controls later on this page.



Federal users can enter detailed training evaluations for individual employees.

Field or Control	***Description***
All Sessions Attended	Select *Yes* or *No.*
Comments	Enter an optional explanation of the responses to the preceding fields.

Actual Course Hours

Field or Control	***Description***
Duty	Enter the number of hours in training that are normally spent at work.
Non-Duty	Enter the number of hours spent in training or required for travel outside of duty hours.

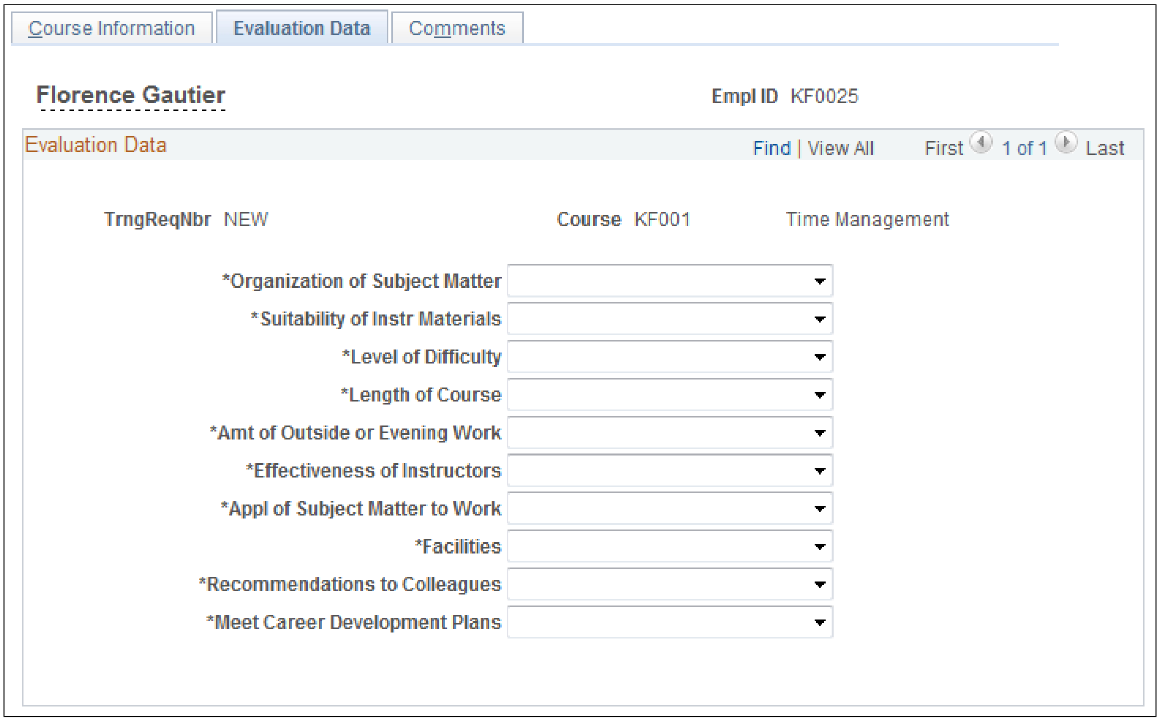
Individual Training Evaluation - Evaluation Data Page

Use the Individual Training Evaluation - Evaluation Data page (GVT_TRNREQ_SEC_CE2) to record an employee's feedback about various areas of the course such as course materials, applicability of the course, and training facilities.

Navigation:

Administer Training > **Result Tracking** > **Individual Training Evaluation** > **Evaluation Data**

This example illustrates the fields and controls on the Individual Training Evaluation - Evaluation Data page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Organization of Subject Matter	Select *Poorly organized, Adequate,* or *Well Organized.*
Suitability of Instr Materials (suitability of instructor's materials)	Select *Poorly suited, Adequate,* or *Well Suited.*
Level of Difficulty	Select *Appropriate, Too Advanced,* or *Too Elementary.*
Length of Course	Select *Appropriate, Too Long,* or *Too Short.*
Amt of Outside or Evening Work (amount of outside or evening work)	Select *Appropriate, Insufficient,* or *Too Much.*
Effectiveness of Instructors	Select *Excellent, Good,* or *Poor.*
Appl of Subject Matter to Work (applicability of subject matter to work)	Select *Insignificant, Adequate,* or *Significant.*
Facilities	Select *Excellent, Good,* or *Poor.*

Field or Control	***Description***
Recommendations to Colleagues	Select *Highly Recommend* or *Not Recommend.*
Meet Career Development Plans	Select *No, Yes,* or *Not Applicable.*

Running Course Session Reports

This topic discusses how to generate reports of scheduled course sessions.

Pages Used to Run Course Session Reports

Page Name	***Definition Name***	***Usage***
Course Attendance Status	RUNCTL_TRN018	List the attendance status of the students in a course. This is an SQR report.
Course Rating Report	RUNCTL_TRN017	Detail ratings for sessions of a course.
Course Ratings Templates	RUNCTL_TRN019	Create the evaluation template that should be completed by students enrolled in a course session.
Administer Training Roster	RUNCTL_TRN002	List the course name, session number, session start date, and all students who are enrolled in a course.
Equipment Checklist	RUNCTL_TRN034	List required equipment for a course session. For each item, the report shows the quantity required, the number available in the training room and facility, and the total number that is booked at the facility for a given period.
Statistics of EEs Enrolled	RUNCTL_TRN022	List the employees who are enrolled in courses and lists course statistics by company, location, and department.
Administer Training Facility	RUNCTL_TRN005	List course sessions scheduled at a training facility during a given period. Sessions are listed by course start date.
Training Instructor Schedules	RUNCTL_TRN033	List the courses that an instructor is scheduled to teach during a given period.

Page Name	***Definition Name***	***Usage***
Administer Training Schedules	RUNCTL_TRN004	List course sessions that are scheduled within a given period.

Chapter 7

Enrolling and Wait-Listing Students

Understanding Student Enrollment Options

These topics list common elements and discuss enrollment methods.

Common Elements Used to Enroll and Wait-List Students

Field or Control	***Description***
First, Previous, Next, and **Last**	Click to display another group of student IDs.
Refresh Search Fields	Click to clear the search criteria that you entered on the Name or ID Search page.
Search on Name or ID	Click to access the Name or ID Search page and filter students by name or ID.
DIF	Individual Training Rights (Droit Individuel a la Formation). Select this check box to calculate how many hours the employee gets for training purposes, according to his seniority, contract type and working hours.
Training Out of Working Hours	Specify the number of hours a student spends outside their work schedule.
Training Plan Category	Select a training plan category. The values are: **Skill Development, Adaptation to Job Changement, Job Preservation, Not Specified.**

Enrollment Methods

Enrollment options enable you to:

- Set up sessions in advance and publishing a training schedule that students review to make their enrollment requests.
- Set up waiting lists and creating course sessions only when there are enough students to fill the session.

Note: When you use the Enroll by Department Demand, Enroll by Employee Demands, or Group Enroll components, students with a wait-list status also appear in the course waiting list, and students with an enrolled status appear on the Enroll Individually page.

For all enrollment options, you can generate standard letters to notify students when you enroll them in a course or reschedule or cancel a course session.

Generating Student Form Letters

These topics give and overview of how to produce training letters and discuss how to run the training letter report.

Understanding How to Produce Training Letters

You can automatically generate a variety of student form letters. PeopleSoft HR delivers types of training letters explicitly for:

- Notification of course session enrollment Confirmation (for employees with letter code CON).
- Notification of course session rescheduling (for employees with letter code RSC).
- Notification of course session cancellation (for employees with letter code CAN).

Note: PeopleSoft HR does not deliver notifications to course waitlisted or course session waitlisted employees with letter codes WTC and WTS respectively.
To generate training letters:

1. Review (and update as needed) the letter codes on the following pages for students to whom you'll send letters:

    - Course Auto Enroll (course automatic enrollment).
    - Enroll Individually.
    - Express Rescheduling.
    - Course Wait List.
    - Student Training.

      Review letter codes for in-house courses on this page. Once student records have letter codes, you can generate form letters anytime.

2. Run the Training Letters report to generate form letters containing student data.

    You can run the report for all course sessions that are scheduled within a defined period, for course sessions of a specified course within a defined period, or for one course session.

    This report runs three processes:

    - A Structured Query Report (SQR) to extract data from HR.

From the records of students who are linked to course sessions that match the report parameters that you select, the SQR extracts data containing the letter code CON (confirmation), CAN (cancellation), and RSC (rescheduling), without a field value for the **Date Printed** field. When you run the Training Letters report, the system enters a value for the Date Printed field into the student records. The next time that you generate letters, the system doesn't create duplicate letters for those students.

- A Microsoft Word macro to merge the data into a form letter template.
- A PeopleSoft Application Engine process that sends training letters by email to students who have an email address.

  See “Understanding PeopleSoft HCM Form Letters” (Application Fundamentals).

3. Print the training letters using Microsoft Word.

   The system creates the form letters in a temporary directory on the application server, putting all letters of the same type in one file.

   Note: So that employees can receive training letter emails, course sessions must be defined with facility and room information.

Page Used to Generate Student Form Letters

Page Name	***Definition Name***	***Navigation***	***Usage***
Create Training Letters	RUNCTL_TRN001	**Administer Training** > **Student Enrollment** > **Create Training Letters** > **Create Training Letters**	Produce training letters.

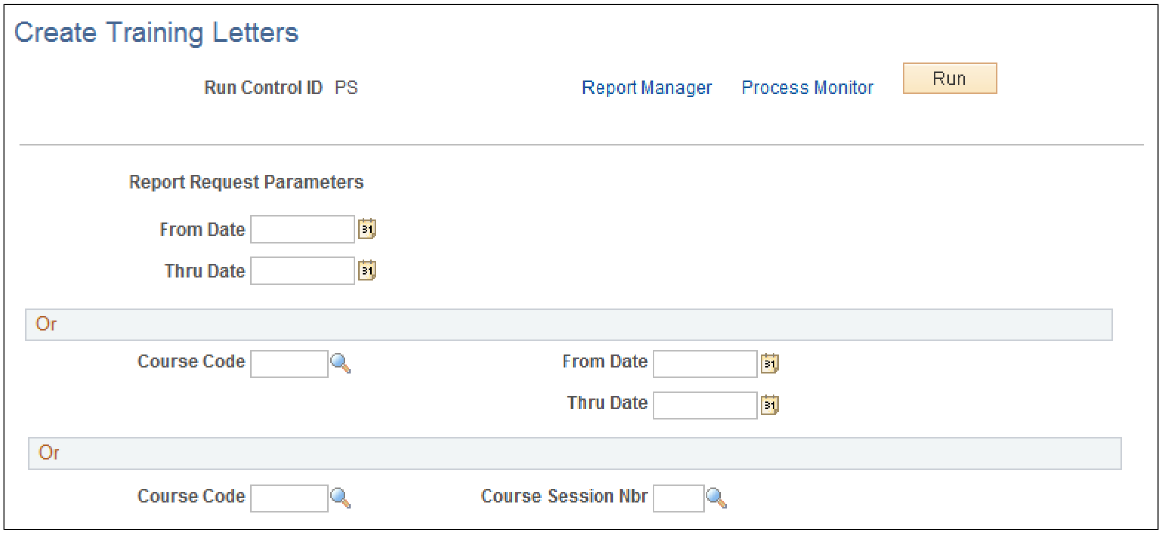
Create Training Letters Page

Use the Create Training Letters page (RUNCTL_TRN001) to produce training letters.

Navigation:

Administer Training > **Student Enrollment** > **Create Training Letters** > **Create Training Letters**

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



Field or Control	***Description***
From Date and **Thru Date** (through date)	Enter the start and end date to generate letters for all course sessions within a period.
Course Code	Enter the course code to generate letters for a specified course. Enter information in either: • The **From Date** and **Thru Date** fields, to print letters of all sessions in the period. • The **Course Session Nbr** (course session number) field, to print letters for a single session.

Field or Control	***Description***
Run	Click the Run button to display the Process Scheduler Request page. • Select the Email Training Letters process (TRN001-J) (process type PSJob) if you want PeopleSoft Process Scheduler to automatically run the processes sequentially. The process: 1. Runs the SQR report process to extract data. 2. Initializes Winword. 3. Runs the Application Engine that calls the Microsoft Word macro to merge the data. 4. Runs the Application Engine process that sends email training letters to students with email addresses. • Select Training Letters process (TRN001DG) (Process Type PSJob) to create the letters without mailing them. To run the PSJob Training Letters process properly, at the first step of the PSJob (the SQR Report), select *File* in the **Type File** field and *LP* in the **Format** field. The PSJob generates the letters into the third step (PSMERGE). Then run the Application Engine process for emails. • Select the Training Letters Data Extract process (TRN001) (process type SQR Report) to create the data file in order to check the extracted data. Select *File* in the **Type** field and *LP* in the **Format** field. Then run the Application Engine process for emails. The file is posted on the web server, on the Report Repository. No matter the output destination that you specify on Process Scheduler, the system always sends the data extract files and the form letter to the Report Repository. Use Word to print the letters. Always run the Email Training Letters and Training Letters PSJobs on with the Process Scheduler set for WinWord processes.

Related Links

“Using Naming Conventions in Form Letter Files” (Application Fundamentals)

Enrolling Students Manually

Enrolling individual students is useful if you create course sessions before students request enrollment.

Pages Used to Enroll Students Manually

Page Name	***Definition Name***	***Usage***
Enroll Individually Page	COURSE_ENROLLMENT	Enroll individual students, add them to a course session waiting list, and adjust to existing subscriptions. Check the results of the automatic enrollment. To adjust several student subscriptions, use the Course Session Auto Enrollment page.

Enroll Individually Page

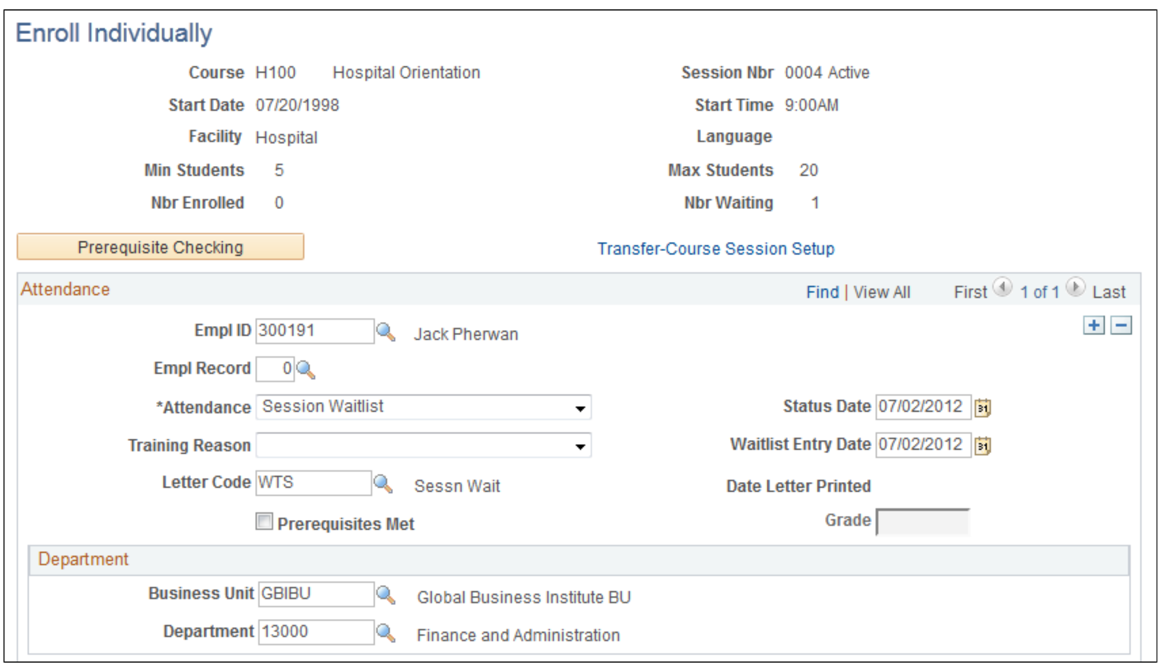
Use the Enroll Individually page (COURSE_ENROLLMENT) to enroll individual students, add them to a course session waiting list, and adjust to existing subscriptions.

Check the results of the automatic enrollment. To adjust several student subscriptions, use the Course Session Auto Enrollment page.

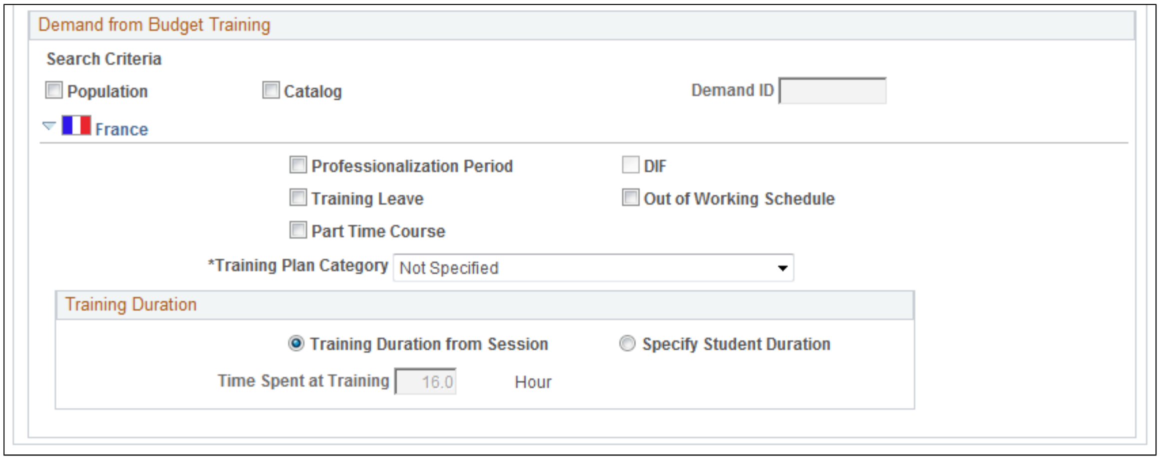
Navigation:

Administer Training > **Student Enrollment** > **Enroll Individually** > **Enroll Individually**

This example illustrates the fields and controls on the Enroll Individually page (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Enroll Individually page (2 of 2). You can find definitions for the fields and controls later on this page.



Note: You can access only sessions for which the **Session Administration** check box is selected on the Course Session Profile page.

To remove students from a session, delete the row from the page.

Field or Control	***Description***
Prerequisite Checking	Click to check whether a student has met the requirements for a course before confirming final enrollment.
Transfer-Course Session Setup	Click to access the Course Session table.

See Setting Up Courses.

Attendance

Field or Control	***Description***
Attendance	Select the student's status: *Enrolled:* Enroll a student in the session. If you enroll more than the maximum number of students allowed in the session, you get a warning message when you save the page. *Sessn Wait (session waitlist):* Add a student to a session waiting list. You can change a student's status to any value except *Crse Wait* (course waitlist). To add a student to a course waiting list, use the Create/Update Course Wait List page. To change a student's status to *Crse Wait,* use the Student Training - Course Student Enrollment page. (USF) *Request:* For U.S. federal users only. Use to enter a training request. When you've entered the training request data, PeopleSoft Workflow routes the request and tracks the process from *Request* to *Authorized* to *Enrolled* or *Waitlisted.*
Status Date	Displays the system date, usually today's date, as the initial value, which you can change.
Waitlist Entry Date (waitlist date)	Enter the waiting list date if the student is on a session waiting list and has an **Attendance** status of *Sessn Wait.* The system hides this field when the student is enrolled in a training course.
Training Reason	Select a reason for the training.
Letter Code	Enter a letter code to generate a form letter. Values are: *CON:* Use if the student's status is *Enrolled.* *WTS:* Use if the student's status is *Session Waitlist.*
Date Letter Printed	Displays the date once you generate the letter.
Prerequisites Met	If you identified prerequisites on the Course Table - Prereqs, Goals page, the system selects this check box if the student has met all of the prerequisites. Otherwise, you can select the box manually.

Field or Control	***Description***
Grade	Appears when the student's status is *Completed.*

Department

Field or Control	***Description***
Business Unit and **Department**	The system populates these fields from the employee's job data record. If you've enrolled a nonemployee in a course session, the nonemployee's business unit information comes from the information that you entered in the Add Non-Employee component.

(USF) Training Request Data

U.S. federal users can request a training session and track student training processes, such as accessing student data, maintaining student training data, viewing training summary information, tracking student tuition reimbursement, and reviewing training-related employee data.

Field or Control	***Description***
Training Request Required	Select this check box to process training request information for an employee. The system displays the **Trn Request** button and the **Print SF182** icon.
Training Request Data	(USF) Click to access the Employee Training Request Data page and enter additional information.
Print SF182	(USF) Click this icon to print the training request form (SF-182). The form is printed after you have completed and saved the request information.

Demand from Budget Training

In this group box, you link enrollments with a training demand that you defined in the Budget Training business process. With this link, the system can compute the ratio between the projected costs in the Budget Training business process and the actual costs that you track in the HR Administer Training business process.

Field or Control	***Description***
Population	Select this check box and prompt for a demand ID to look for people who have entered a demand for the current course. The system uses the employee's department information to retrieve matching demands. If selected, the system displays all Budget Training demands with the following restrictions: • The course session start and end dates must be in the budget period of the demand. • For individual demands, the employee must be the same as the employee ID that you entered on this page. • For general demands, the employee ID on the Enroll Individually page must be on both the Demand Department list and the Demand Job list. • The course of the demand must be the same as the enrolling course.
Catalog	Select to look for demands that are associated with the current course or with the demand category or subcategory that includes that course. The system uses the catalog hierarchy to retrieve a demand for the current course. If you select this check box and prompt for a demand ID, the system displays all Budget Training demands with the following restrictions: • The course session start and end dates must be in the budget period of the demand. • When the demand course value is *UNKNOWN,* the demand subcategory must include the current course. • When the demand course value is *not UNKNOWN,* the demand course must be the same as the current course. • When the course and the subcategory values for the demand are *UNKNOWN,* the demand category must include the current course.

Field or Control	Description
Population and **Catalog**	If you select both check boxes, the system displays all Budget Training demands, with the following restrictions: • The course session start and end dates must be in the demand budget period. • For individual demands, the employee ID of the demand must be the same as the student ID for the enrollment. • For general demands, the student ID of the enrollment must be on both the Demand Department list and the Demand Job list. • When the demand course value is *UNKNOWN,* the demand subcategory must include the current course. • When the demand course value is *not UNKNOWN,* the demand course must be the same as the current course.
Demand ID	Displays the budget training demands that match the criteria (when you select the search criteria).

(FRA) France

For French companies, enter the additional enrollment information that is required for French Training report (2483).

Field or Control	Description
Professionalization Period	Select if course enrollment occurs as part of a professionalization contract.
Training Leave	Select if the employee is taking the training course during his or her leave.
Part Time Course	Select if you're enrolling the employee in a sandwich course, where the employee gains work experience while studying.

Field or Control	***Description***
DIF	Select to activate the DIF fields on the Training Hours Details secondary page. When this check box is selected, the system sets the Session Cut DIF Duration on the secondary page to the Session Cut Duration for all session cuts that have a status of Awaiting Review. When the check box is deselected, the DIF related rows are hidden on the secondary page and all DIF values are set to zero.
Out of Working Schedule	Select to track enrollments out of the working schedule that trigger training allocation payments from the payroll system. There are two allocations for training out of the working schedule: one is for DIF training, and the other is for skills development training. When this check box is selected, the *Duration out of Working Schedule* field on the Training Hours Details page is set to the Session Cut Duration for all session cuts that have a status of **Awaiting Review.** **Note:** . If you select **Out of Working Schedule** but do not select **DIF,** you must set the **Training Plan Category** to *Skills Development* to enable allocations from the payroll system. **Note:** The system automatically prevents you from changing the DIF and Out of Working Schedule options when all session cuts in a training session have a status other than *Awaiting Review.*

Related Links

Understanding How to Produce Training Letters

Enrolling Students by Department Demand

These topics discuss how to enroll students by department.

- Enroll students by department.
- View subscribed employees.

Pages Used to Enroll Students by Department Demand

Page Name	***Definition Name***	***Usage***
Department Demand Page	TRN_GNRL_DMND_SUBS	Enroll students (employees who qualify for training according to a set criteria) in a course session. Add students (who are included in a department demand) to a waiting list.
Department Demand - Demands Search Criteria	TRN_GN_DMND_CR_SEC	Click the **Demands Filter** link on the Department Demand page. Limit the selection to a specific course or courses within a particular category or subcategory. List employees who have subscribed to a training course and who belong to the specified business unit and department for sessions that occur within the budget period.
Department Demand - Employee / Course Details	TRN_GN_DMND_SEC	Click the **Details** link on the Department Demand page. View information about the course session that you selected on the Department Demand page.
Enroll by Department Demands - Subscriptions Page	TRN_GNRL_TRAIN_SUB	View subscribed employee information for students who successfully subscribed to the courses and sessions that you selected on the Department Demand page. Check their status and the course enrollment dates.
Subscriptions - Employee/Course Details	TRN_TRAINING_SEC	Click the **Details** link on the Enroll by Department Demands - Subscription page. View information about the selected course session.

Related Links

Defining Employee Training Demands and Demand by Course

Department Demand Page

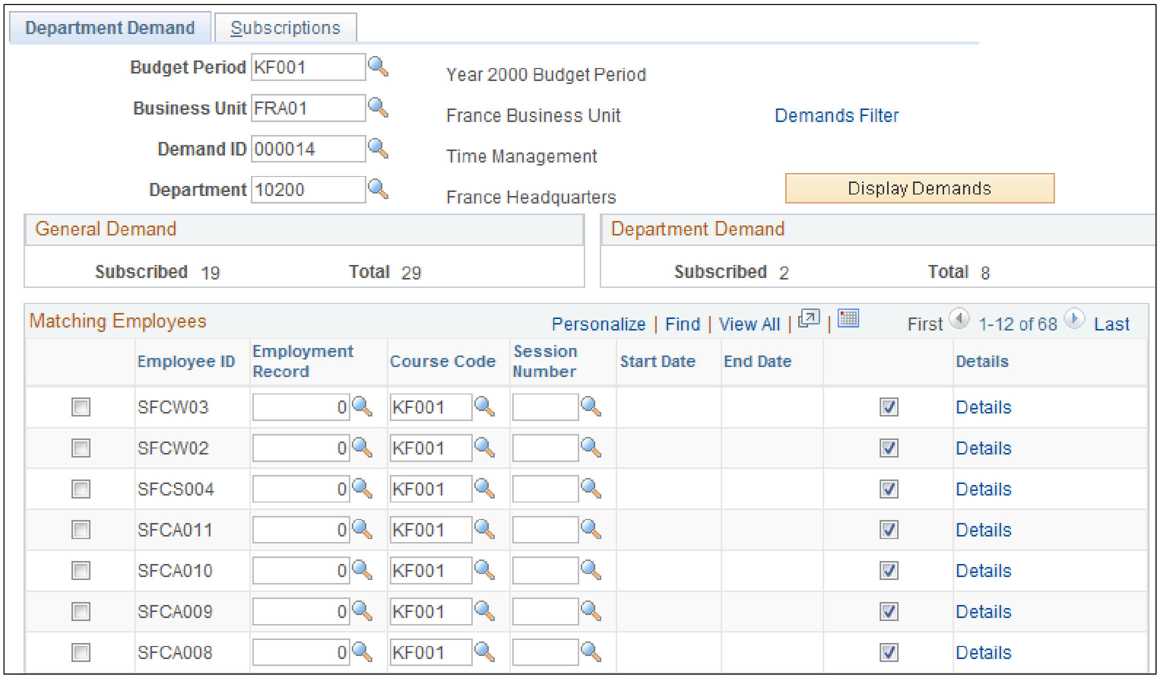
Use the Department Demand page (TRN_GNRL_DMND_SUBS) to enroll students (employees who qualify for training according to a set criteria) in a course session.

Add students (who are included in a department demand) to a waiting list.

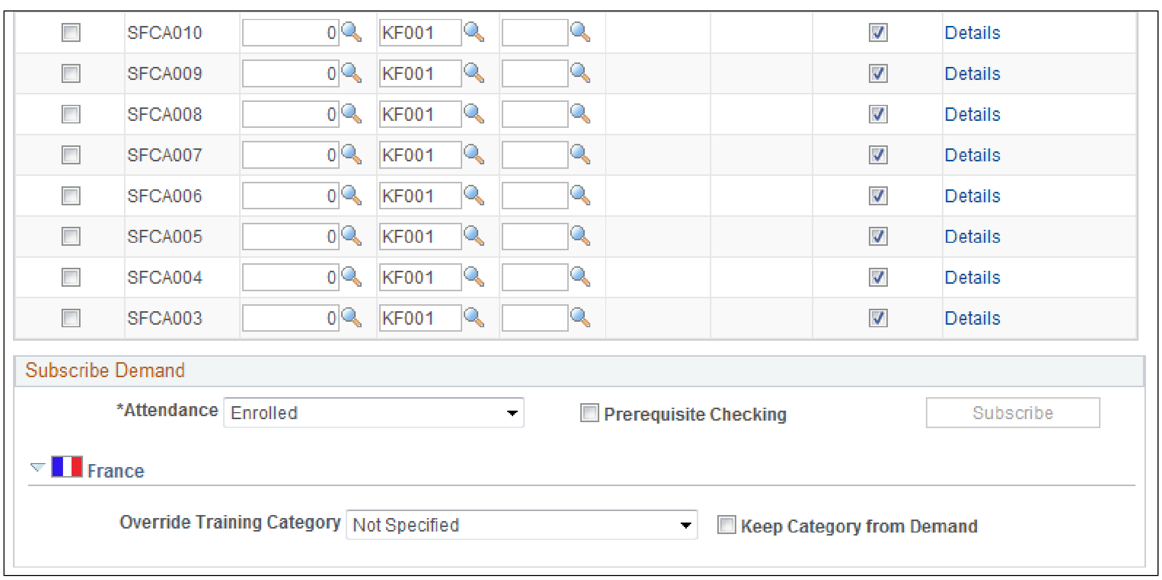
Navigation:

Administer Training > **Student Enrollment** > **Enroll by Department Demands** > **Department Demand**

This example illustrates the fields and controls on the Department Demand page (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Department Demand page (2 of 2). You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Budget Period	Enter the budget period for the department demand to enroll in a course session.

Field or Control	***Description***
Demand ID	Enter the demand ID to include in the enrollment process. The training demand includes information about the course in which students should be enrolled, course category classifications, budget period dates, and employee qualification criteria.
Department	Enter the department code for the students to enroll in a session. You can select only from the departments that are included in the demand ID that you specified. When you move out of the **Department** field, the system makes the **Display Demands** button available.
Demands Filter	To limit the search further, click this link to access the Demands Search Criteria page and specify a category or subcategory from the training catalog. You can also specify a course and approved demands only. To limit demands using selection criteria after you click the **Display Demands** button, cancel the page and start again.
Display Demands	Click to populate the **Matching Employees** group box with employees who meet the selection criteria (such as department and job codes) that are defined in the demand ID.
General Demand	Displays the number of employees to be trained for this job code.
Department Demand	Displays the number of employees to be trained in a specific course for a particular department.

Matching Employees

Field or Control	***Description***
Details	Click to access the Department Demand - Employee / Course Details page and view the employee's name and the details of the course session that you selected.

Subscribe Demand

In this group box, you enroll employees or add them to the course or session waiting list.

Field or Control	*Description*
Attendance	Select from one of the following valid statuses: *Crse Wait* (course wait-listed), *Enrolled,* and *Sessn Wait* (session wait-listed). If you've already found matching employees and have reset the **Attendance** field, the system clears any session information that you entered.
Prerequisite Checking	Select to verify whether students have met the prerequisites for a course specified in the Course table. Students who haven't met the prerequisites won't be enrolled in the course when the system processes the request.
Subscribe	Click this button once you have selected the employees to enroll or add to the waiting list. Depending on the attendance value that you selected, the system enrolls or wait-lists students for whom you selected the **Do** check box.

(FRA) France

Field or Control	*Description*
Override Training Category	To override the training category that is associated with the training demand, select the category here.
Keep Category From Demand	Select this option to retain the training category that is associated with the training demand.

Enroll by Department Demands - Subscriptions Page

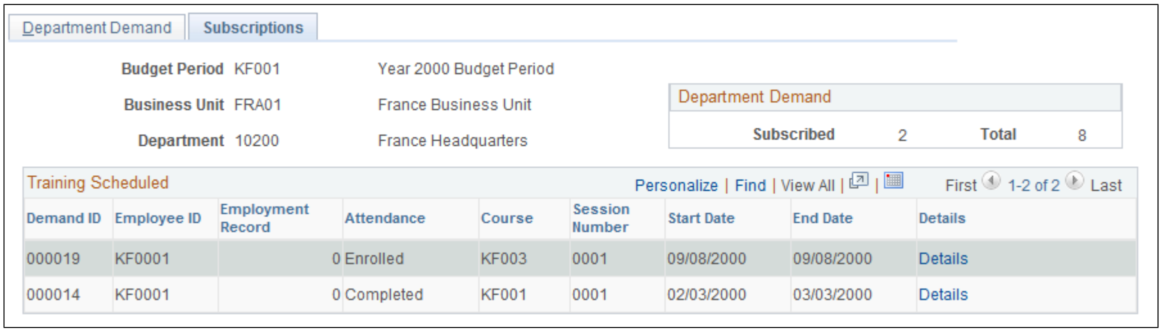
Use the Department Demand - Subscriptions page (TRN_GNRL_TRAIN_SUB) to view subscribed employee information for students who successfully subscribed to the courses and sessions that you selected on the Department Demand page.

Check their status and the course enrollment dates.

Navigation:

Administer Training > **Student Enrollment** > **Enroll by Department Demands** > **Subscriptions**

This example illustrates the fields and controls on the Enroll by Department Demands - Subscriptions page. You can find definitions for the fields and controls later on this page.



The system lists employees who were enrolled or wait-listed in the courses and course sessions that you selected on the Department Demand page.

Click the **Details** link to access the Employee / Course Details page and view the employee's name and the details of the course session.

Enrolling by Employee Demand

This topic lists pages used to enroll by employee demand.

Pages Used to Enroll by Employee Demand

Page Name	***Definition Name***	***Usage***
Employee Demands Page	TRN_EMPL_DMND_SUBS	Select approved employee demands to enroll in the requested courses. You set up courses on the Employee Demand Profile page or the Employee Demand Course page.
Employee Demands - Demands Search Criteria	TRN_EE_DMND_CR_SEC	Click the **Demands Filter** link on the Employee Demands page. Limit the selection to a course or courses in a particular category or subcategory.
Employee Demands - Employee/Course Details	TRN_EE_DMND_SEC	Click the **Details** link on the Employee Demands page. View information about the selected course session.

Page Name	***Definition Name***	***Usage***
Employee Demands - Subscriptions	TRN_EMPL_TRAIN_SUB	**Administer Training** > **Student Enrollment** > **Enroll by Employee Demands** > **Subscriptions** View employees who successfully subscribed to the courses and sessions that you indicated on the Employee Demands page. Check status and course enrollment dates.

Related Links

Methods of Determining Training Demand
Enrolling Students by Department Demand

Employee Demands Page

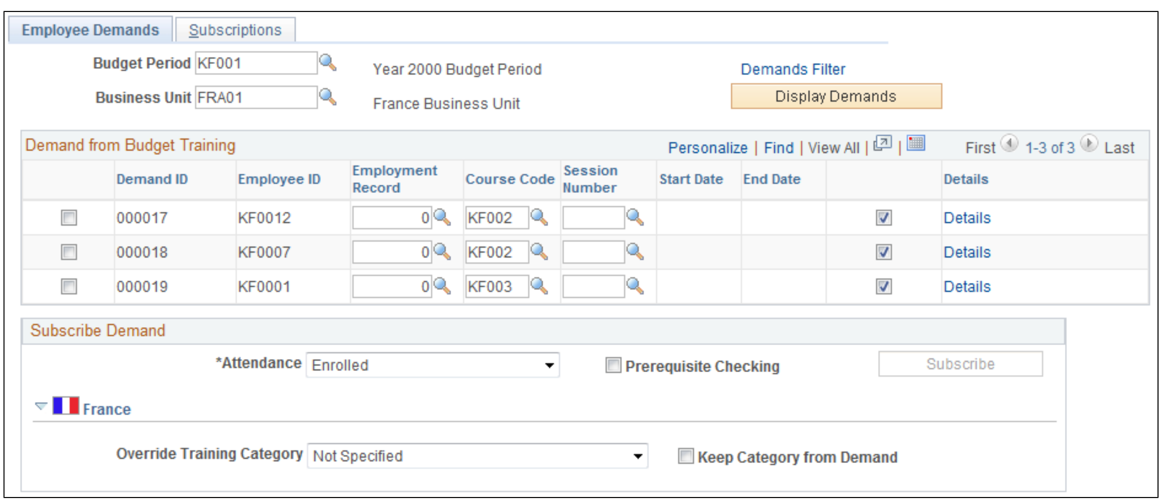
Use the Employee Demands page (TRN_EMPL_DMND_SUBS) to select approved employee demands to enroll in the requested courses.

You set up courses on the Employee Demand Profile page or the Employee Demand Course page.

Navigation:

Administer Training > **Student Enrollment** > **Enroll by Employee Demands** > **Employee Demands**

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



(FRA) France

Field or Control	*Description*
Override Training Category	Select this option to override an existing training category and assign a new one during enrollment.
Keep Category From Demand	Select this option to retain the training category selected. Deselect **Keep Category from Demand** to activate **Override Training Category.**

Enrolling Students by Group

These topics discuss how to enroll or wait-list students.

Pages Used to Enroll Students by Group

Page Name	*Definition Name*	*Usage*
Enroll Group Page	TRN_GRP_ENROLL_GBL	Enroll or wait-list group members to a course.
Comments	TRN_GRPDESCGBL_SEC	Click **Group Comments** on the Enroll by Group or Group Enrollment - Subscriptions page. View a description of selected group and the criteria used to build the group.
Enroll Group - Name or ID Search	TRN_GRPSON1GBL_SEC	Click the **Search by Name** or **ID** link on the Enroll Group page. Select members of the group to enroll or add to waiting lists.
Enroll Group - Employee/Course Details	TRN_GRP_ENRGBL_SEC	Click the **Details** link on the Enroll Group page. View details of the course session for which the selected employee is enrolled or wait-listed.
Enroll by Group - Subscriptions Page	TRN_GRP_SUBS_GBL	View the students who were subscribed to the courses and sessions indicated on the Enroll Group - Employee/Course Details page.

Page Name	*Definition Name*	*Usage*
Subscriptions - Name or ID Search	TRN_GRPSON2GBL_SEC	Click the **Search on Name** or **ID** link on the Group Enrollment - Subscriptions page. Select the members of the group whose details you want to view.

Related Links

"Understanding Group Build" (Application Fundamentals)

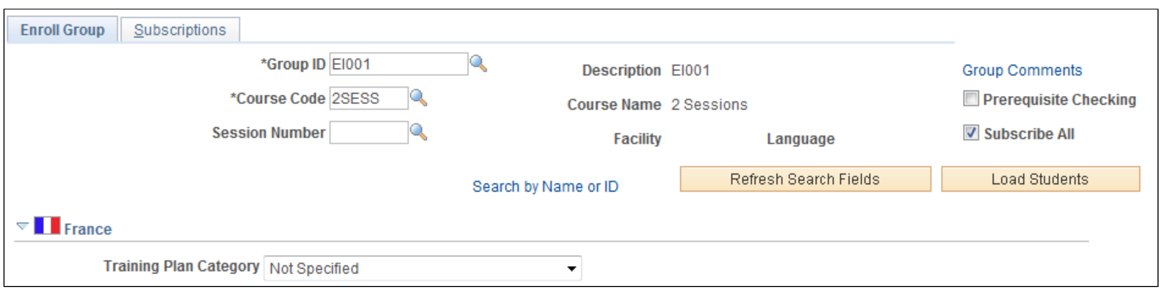
Enroll Group Page

Use the Enroll Group page (TRN_GRP_ENROLL_GBL) to enroll or wait-list group members to a course.

Navigation:

Administer Training > **Student Enrollment** > **Enroll by Group** > **Enroll Group**

This example illustrates the fields and controls on the Enroll Group page (1 of 2). You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Group Comments	Click to access the Comments page and view a description of the group and the group definition.
Course Code and **Course Name**	Displays the course code and name. If the course is multilingual, a message instructs you to select a course session.
Session Number	Enter a session in a language that is appropriate for the group. This field is required for multilingual courses that don't have course waiting lists.
Facility	If you completed the **Session #** field, the system completes this field using values from the Course Session Table - Location, Instructor page. If you didn't specify a facility when you created the session, the field is blank. This field is unavailable for entry.

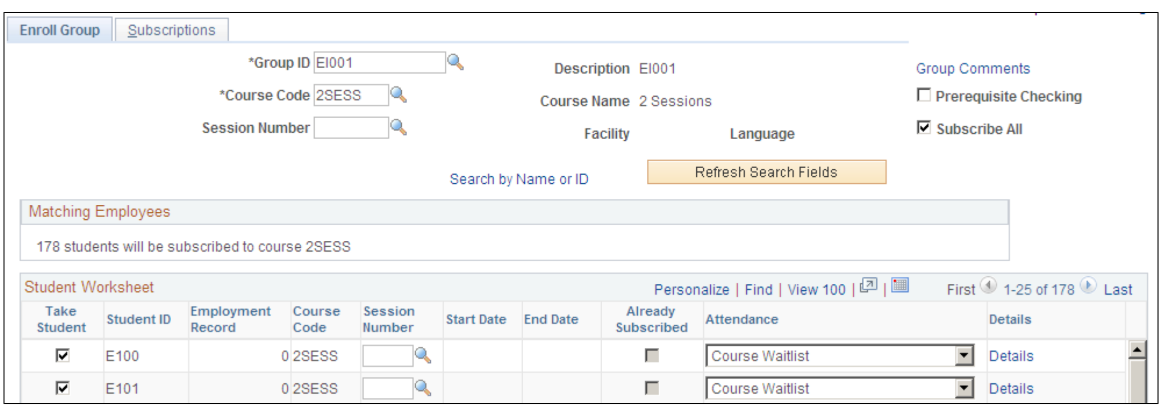
Field or Control	***Description***
Language	Displays the language. If you completed the **Session #** field, and the course is multilingual, the system completes this field from the Course Session table. This field is unavailable for entry.
Prerequisite Checking	Select to verify whether students meet the course prerequisites. Students are added to waiting lists even if they don't meet the prerequisites, and you can decide if they should attend the course.
Subscribe All	Select to select the **Do** check box for students who are listed in the **Matching Employees** scroll area.

The system loads students into this page in batches. You determine the number of rows in a batch in the **Max Number of Rows in Scrolls** (maximum number of rows in scrolls) field on the Installation Table - Third Party/System page. You manage the display of batches using filters and navigation buttons. Filters enable you to enter search criteria for identifying a group of students.

Click the **Search by Name or ID** link to access the filter fields. After entering information in the filter fields, click the **Load Students** button to populate the page with the IDs of students who meet the search criteria.

Field or Control	***Description***
Load Students	Hides after the system populates the **Matching Employees** scroll area and appears again when you select new search criteria or click the **Refresh Search Fields** button.

This example illustrates the fields and controls on the Enroll Group page (after clicking Load Students). You can find definitions for the fields and controls later on this page.



Student Worksheet

When you click the **Load Students** button, the system populates the **Student Worksheet** grid area with students who match the search criteria that you entered.

The system reviews each student's training records to find out whether the student has attended the course.

Select the **Take Student** check box next to the student ID to update the selected student's training data with the current data. For example, if you set the **Attendance** field value to *Enrolled* and complete the session details, the system enrolls the student only if this check box is selected. The system ignores the rows of data where this check box is deselected.

Field or Control	***Description***
Student ID	Displays the employee or nonemployee ID. To display the student's full name, click the **Details** link.
Course Code	Displays the course code that you selected. To select a different course for the group, update the **Course** field at the top of the page and rerun the search.
Session Number	Displays the session number in this field if a student's attendance field value is *Enrolled* or *Sessn Wait.* You can change the course session without affecting other students in the list. For students with an **Attendance** field value of *Crse Wait,* this field appears blank. To add the student to a course session, select the session from the list. When you move out of the field, the system clears the **Attendance** field; you must set it to *Sessn Wait* or *Enrolled.* If the student has completed the course, the system displays the session number and makes the field unavailable.
Start Date and **End Date**	If the student's attendance field value is set to *Enrolled, Sessn Wait,* or *Completed,* the system populates these fields from the Course Session table and makes them unavailable.
Already Subscribed	Appears selected if a student has already been enrolled in a course session or added to a waiting list through the Group Enrollment component. The check box is for information only; you can still change the subscription information on the page. For example, if a student has been previously added to a course waiting list, you can add the student to a session waiting list from this page by updating the **Attendance** and **Session Number** fields. If you subscribed the student using a different option (for example, if you used Enroll Individually to enroll the student manually), the system doesn't select this check box. You can't modify the **Attendance** or the **Session Number** fields for that student.

Field or Control	*Description*
Attendance	Displays the **Attendance** field value from the student's training records if a student is wait-listed for the course, enrolled in a course session, or has completed the course. If the course isn't included in a student's training records, the system sets this field's value. Values are: *Course Waitlist:* The student is on the course waiting list. The system uses this value if the student hasn't been enrolled or wait-listed for the course and the **Session Number** field is blank. To enroll or add the student to a session waiting list, select *Enrolled* or *Session Waitlist* and optionally complete the **Session Number** field. *Enrolled:* The student is enrolled in the selected course session. When you first click the **Load Students** button, the *Enrolled* field value appears only if the student was previously enrolled in the course session (the system doesn't enroll students on this page). *Session Waitlist:* The student is on the course session waiting list. The system uses this value if a student hasn't been enrolled or wait-listed for the course, and you specify a session number. To enroll the student in the session, select *Enrolled.* If you have reached the maximum number of students for the course session, you receive a warning message. *Completed:* The student has completed the course. Once a student has completed a course, you can't enroll that person in the course again, and all fields in that row are unavailable. You can't select *Completed* on this page. You need to update the course session status on the Course Table - Course Profile page.
Details	Click to access the Employee/Course Details page and view the student's full name and the course session details.

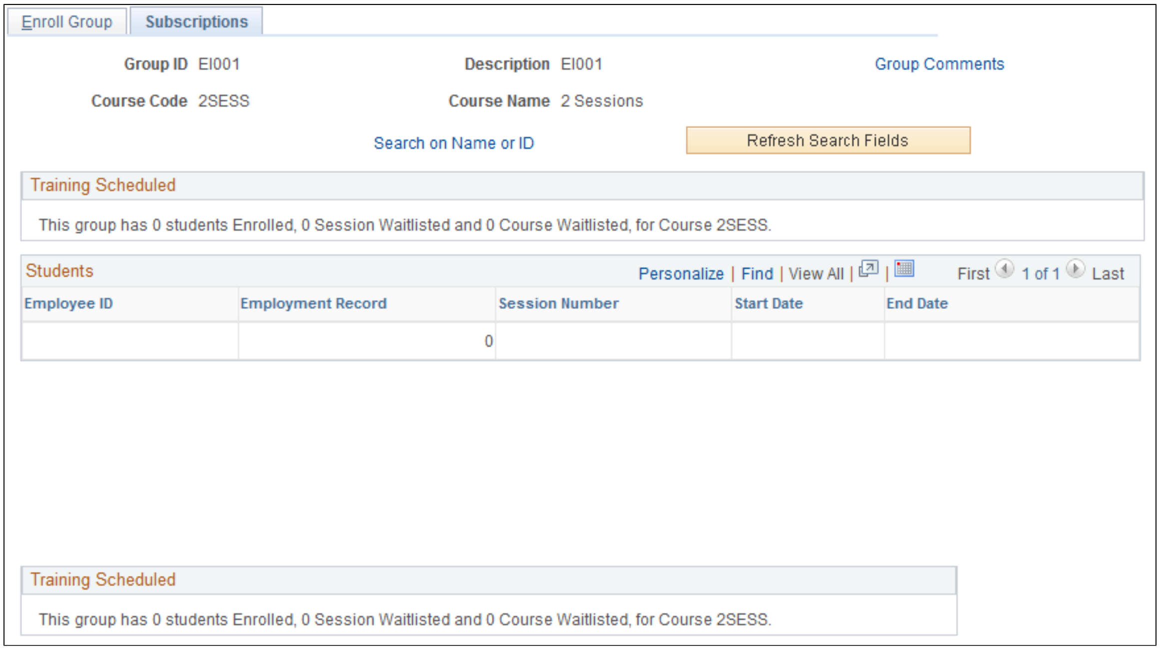
Enroll by Group - Subscriptions Page

Use the Enroll by Group - Subscriptions page (TRN_GRP_SUBS_GBL) to view the students who were subscribed to the courses and sessions indicated on the Enroll Group - Employee/Course Details page.

Navigation:

Administer Training > **Student Enrollment** > **Enroll by Group** > **Subscriptions**

This example illustrates the fields and controls on the Enroll by Group - Subscriptions page (after clicking Load Students). You can find definitions for the fields and controls later on this page.



The system loads students into this page in batches, similar to the Enroll Group page. The **Load Students** button is hidden after you click it to load the data.

Field or Control	***Description***
Group Comments	Click to access the Comments page and view a description of the group and the group definition.

Training Scheduled

When you click the **Load Students** button, the system populates the **Students** scroll area with students who match the search criteria that you entered.

Field or Control	***Description***
Prerequisites Met	If you selected the **Prerequisite Checking** check box on the Enroll Group page, the system verifies whether students have met the course prerequisites. When you access the Subscriptions page, the system selects this check box if the student has met the course prerequisites and deselects it if the student has not. Set up course prerequisites on the Course Table - Prereqs, Goals page (course table - prerequisites, goals page).

Managing Waiting Lists

These topics discuss how to add students to waiting lists and enroll students automatically.

Pages Used to Manage Waiting Lists

Page Name	***Definition Name***	***Usage***
Create/Update Course Wait List Page	COURSE_WAIT_LIST	Add students to waiting lists and assign the enrollment status.
Course Waitlist Details	CRSE_WAITLIST_SEC	Click the student's name on the Create/ Update Course Wait List page. View details of the course or course session for which the selected student is wait-listed.
Course Session Auto Enrollment Page	COURSE_AUTO_ENROLL	Enroll students in a course session automatically.

Create/Update Course Wait List Page

Use the Create/Update Course Wait List page (COURSE_WAIT_LIST) to add students to waiting lists and assign the enrollment status.

Navigation:

Administer Training > **Student Enrollment** > **Create/Update Course Wait List** > **Create/Update Course Wait List**

This example illustrates the fields and controls on the Create/Update Course Wait List page. You can find definitions for the fields and controls later on this page.

You can add employees and nonemployees to a waiting list. Insert additional rows to add students.

Field or Control	***Description***
Name	Displays the name when you select the employee ID. Click the student's name to access the Course Waitlist Details page and view more information about the selected course session.

Field or Control	***Description***
Attendance	Values are: *Crse Wait:* Enroll the student in any session of the course that becomes available. You haven't set up any open sessions for the student to request. *Sessn Wait:* Wait-list the student for a particular course session. To select this status, you must have created the session in the Course Session table and given it a status of *Active.* Students with a *Sessn Wait* status have priority over students with a *Crse Wait* status. **Note:** For multilingual courses, you must use *Sessn Wait* and select a session in the student's language.
Letter Code	Displays a default letter code according to the student's waiting list status. For wait-listed students, the letter code is WTC; for session wait-listed students, it is WTS. If you've created waiting list form letters, you can generate the letters once you save the information that you've entered on this page. Create letter codes on the Standard Letter Table page.
Waitlist Dt (wait list date)	Displays the wait list date. You can override this value if the student has requested the course on a different date. The system uses this date to enroll students, from the oldest date to the most recent. The system sorts students by session number in ascending order. Within each session, it sorts students by status (session wait list first and course wait list second), wait-list date, and ID. Nonemployees appear after employees, using the same sort sequence. The system also uses this sequence for automatic enrollment.
Session Nbr	Enter a session number if you selected an attendance value of *Sessn Wait.* When you leave this field, the system completes the **Start Date, Facility,** and **Language** (if it's a multilingual course) fields.
Status Date	Displays the system date, usually the current date.

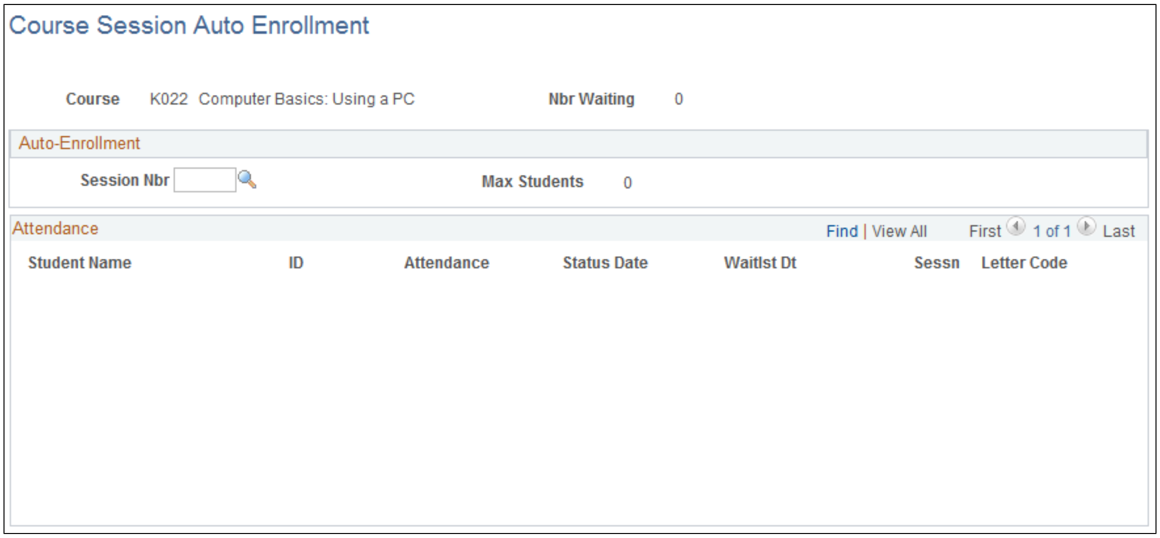
Course Session Auto Enrollment Page

Use the Course Session Auto Enrollment page (COURSE_AUTO_ENROLL) to enroll students in a course session automatically.

Navigation:

Administer Training > **Student Enrollment** > **Course Session Auto Enrollment** > **Course Session Auto Enrollment**

This example illustrates the fields and controls on the Course Session Auto Enrollment page. You can find definitions for the fields and controls later on this page.



Before you can enroll students in course sessions, you must have already created the session in the Course Session table, given it a status of *Active,* and entered a maximum number of students per session.

If you've set up lists for students who are waiting for courses or sessions, you can streamline the enrollment process by using automatic system enrollment.

When a student is automatically enrolled and you've given the student a status of *Sessn Wait* for several sessions of a course and one status of *Crse Wait,* the system deletes all the other data rows on the waiting list for this student for this course.

Note: If you're managing training budgets, the Course Auto Enroll process links costs to the appropriate department and demand in the Budget Training business process. This isn't necessarily the department in which the employee works, as specified on the job record, but it is the department to be billed for the employee's training costs.

Auto-Enrollment

Field or Control	*Description*
Session Nbr	To start automatic enrollment, enter a session number. When you move out of the field, the system issues one of two messages: • If the session is full, then the message says that the session is overenrolled. Click **OK** and select another session number, or click **Cancel.** • If the session isn't full, the message indicates how many slots are available in the session. Click **OK.** The system enrolls students up to the maximum number allowed for the session, as shown in the **Max Students** (maximum number of students) field.

The system first enrolls students with an acceptance field value of *Sessn Wait*(session wait) where the **Sessn** (session) field value matches the selected session number.

Attendance

When you first access this page, the **Attendance** group box displays all employees and nonemployees who are on the session waiting lists or the course waiting list. Students are sorted using the same sequence as on the Create/Update Course Wait List page.

Once you select a session number, the system updates student details. All students who are enrolled in the course session have a status of *Enrolled.* The system also displays a letter code value of *CON,* so that you can generate form letters informing students of their enrollment.

Once you've saved the Course Session Auto Enrollment page, you can move to the Enroll Individually page to make any adjustments to the enrollees in this session.

Related Links

Understanding How to Produce Training Letters

Moving Students Between Course Sessions

Use the Express Rescheduling component to review and update information about students who are enrolled in active course sessions or are on waiting lists. You can move students from one session to another, change their enrollment status, and designate a form letter to send. Although you can change student status, you can't add or remove students from a course.

This topic lists pages used to move students between course sessions.

Page Used to Move Students Between Course Sessions

Page Name	***Definition Name***	***Navigation***	***Usage***
Training Reschedule Sessions Page	COURSE_RESCHEDULE	**Administer Training** > **Student Enrollment** > **Training Reschedule Sessions** > **Training Reschedule Sessions**	Move students between course sessions.

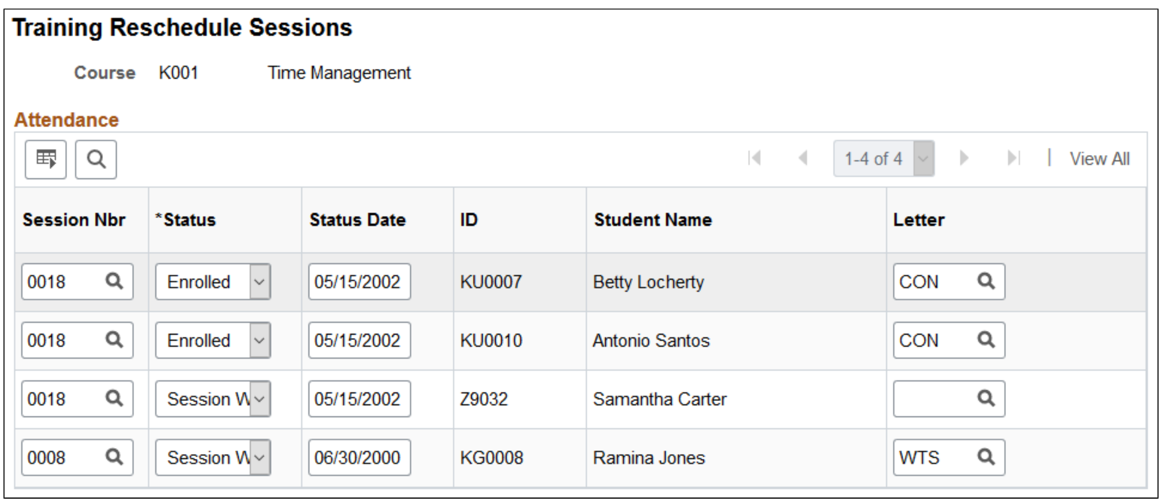
Training Reschedule Sessions Page

Use the Training Reschedule Sessions page (COURSE_RESCHEDULE) to move students between course sessions.

Navigation:

Administer Training > **Student Enrollment** > **Training Reschedule Sessions** > **Training Reschedule Sessions**

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



Field or Control	***Description***
Session Nbr	Displays session numbers for enrolled or wait-listed students. To enroll a student in a session, select the session number.
Status	Values are: *Enrolled:* Enroll a student in the session that you selected in the **Session #** field. *Crse Wait* *Sessn Wait*

Field or Control	*Description*
Status Date	When you select a different status for a student, the system updates this field.
Letter Code	Changes according to the status. The next time that you generate training letters, the system creates a letter of the type that is defined by the letter code.

Note: If the number of enrolled students in a session exceeds the maximum number allowed, you receive a warning message.

Related Links

Understanding How to Produce Training Letters

Running Enrollment and Waiting List Reports

This topic lists pages used to run enrollment and waiting list reports.

Pages Used to Run Enrollment and Waiting List Reports

Page Name	*Definition Name*	*Usage*
Standard Form -182	RUNCTL_SF182	(USF) Generate the 182 report, which provides a standardized mechanism to request, authorize, and detail estimate costs and billing, as well as certify training programs for employees. This is an SQR report.
Training enrollment status	RUNCTL_TRN003	List students on all waiting lists for a course. This is a BI Publisher.

Chapter 8

Tracking Student Training

Understanding Tracking

You can follow student progress in both internal and external (offsite) courses for both employees and nonemployees, such as contractors or temporary workers. You can review training-related employee data, including education and certifications, by viewing employee profiles that are managed using the Manage Profiles business process.

You can view training data for all students who have taken training courses or have other training data in the system.

Related Links

“Working with Alternate Character Sets” (Application Fundamentals)

“Understanding Profile Management” (PeopleSoft Human Resources Manage Profiles)

Maintaining Student Training Data

These topics discuss how to maintain student training data.

When you add students to waiting lists and enroll them in sessions that are administered in house, the system adds and updates data rows in the Student Training component. You can review and update that information.

To enroll or wait-list students in training course sessions, use the Student Enrollment - Enroll Individually page. When students have completed sessions, you can enter their course grades on this page.

Pages Used to Maintain Student Training Data

Page Name	***Definition Name***	***Usage***
Course Student Enrollment Page	COURSE_STUDNT_ENRL	Review or enter student and course information.
Demand from Budget Training Page	COURSE_STUDNT_ENR2	Specify how a course that a student has completed or is enrolled in should be billed to a business unit and department.
Training Hours Details Page	TRN_DIF_ENROLL_SEC	Track training durations for each training type (DIF, Non-DIF).

Page Name	***Definition Name***	***Usage***
Review Training Summary	TRN_STUDNT_CRS_SUM	**Administer Training** > **Result Tracking** > **Review Training Summary** > **Review Training Summary** Review student training to determine whether students are receiving adequate training for their jobs or have taken course prerequisites. Useful for career and succession planning.
Review Competency Training Page	COMP_TRAINING	Search for training courses that address a selected competency.

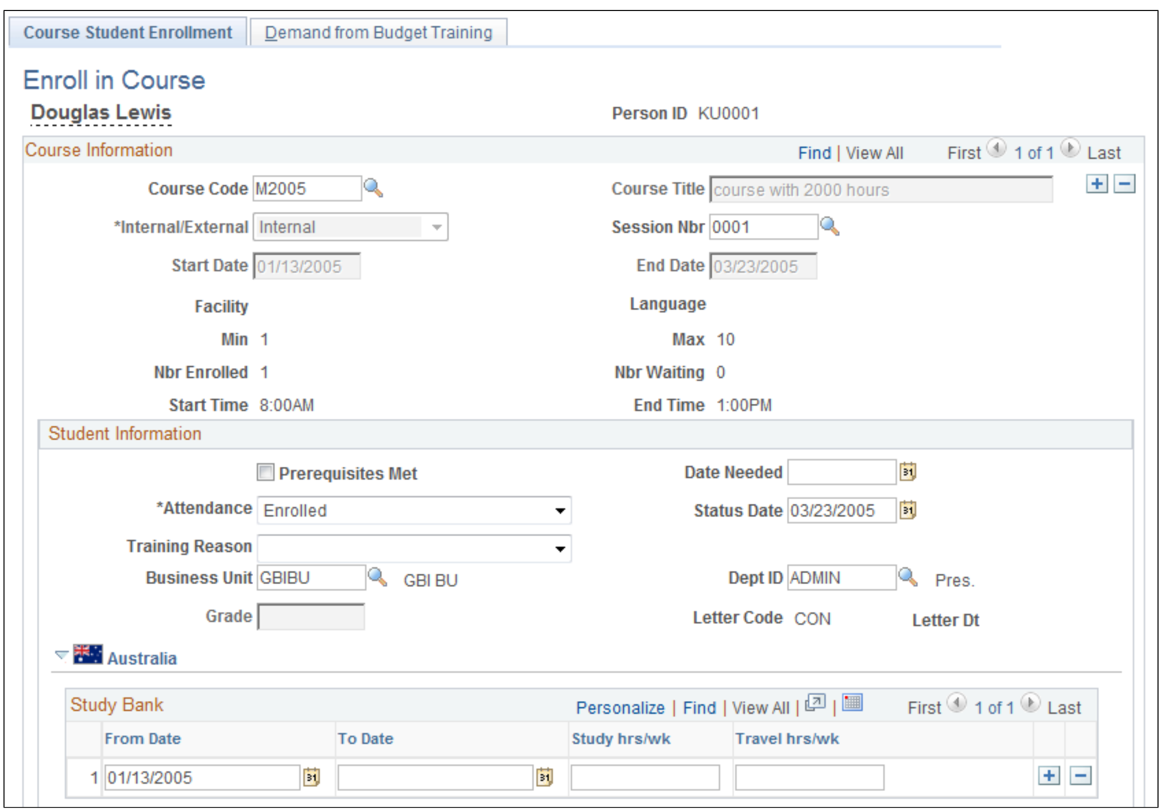
Course Student Enrollment Page

Use the Course Student Enrollment page (COURSE_STUDNT_ENRL) to review or enter student and course information.

Navigation:

Administer Training > **Student Enrollment** > **Enroll in Course** > **Course Student Enrollment**

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



Note: The Training History page accessed from Workforce Development, Profile Management is the same as the Course Enrollment page. However, the Demand from Budget Training page is not part of the Training History component.

Course Information

For course sessions that are administered in house, the system displays data from the Course Session table and Enroll Individually page and makes some fields unavailable.

To enroll the student in a course that you don't administer in house, insert a new row and fill in the fields.

Field or Control	***Description***
Course Code and **Course Title**	If the course session is administered in house, the system displays these values. If you're adding information about a course that is not administered in house, and if the course is in the Course table, select the course code. Otherwise enter the course name in the **Course Title** field.
Internal/External	Displayed if you entered a course code. If the value isn't displayed, select *Internal* or *External.*
Start Date and **End Date**	If dates and times aren't displayed, enter them.
School Code and **School Name**	Enter the name of the school if there is no corresponding school code.
Facility, Language, Session Nbr, Min, Max, Nbr Enrolled, and **Nbr Waiting** (facility, language, session number, minimum students, maximum students, number enrolled, and number waiting)	These fields apply only to course sessions that are administered in house.

Student Information

Field or Control	***Description***
Prerequisites Met	Select to indicate that a student has met the required prerequisites or training before enrolling in a course.
Date Needed	Enter the date when the student should have completed this course.

Field or Control	***Description***
Attendance	Displayed if the course session is administered in house. Changing the status may affect session enrollments, so go to the Enroll Individually page to make other adjustments, such as moving a student from the waiting list into the course. You can update the status of enrolled students to *Completed* here or on the Enroll Individually page. If the course isn't administered in house, select an attendance status. The values that you'll use most often are *Currently Attending* and *Completed.* If this training course is also in the employee career plan, once the status is *Completed,* the end date of the course appears in the **Completion Date** field on the Career Plan Career Training Plan page. See “Reviewing Employee Career Data” (PeopleSoft Human Resources Plan Careers and Successions).
Status Date	Initially populated by the system date.
Waitlist Date	Displayed if the value in the **Attendance** field is *Course Waitlist* This field applies only to courses that are administered in house.
Business Unit and **Department**	These fields identify the business unit and department to which training is billed. You can change the default values. The source of the default values is as follows: • If the course is administered in house, the values come from the Enroll Individually page. • If the course is administered outside of your organization and won't be administered using the Enroll Individually page or the course information is new (regardless of whether it is administered in house), the values come from the employee's job data record. • If the student is a nonemployee (the nonemployee's business unit information comes from the Add Non-Employee component).
Grade	If the student has completed the course, enter a grade.

Field or Control	*Description*
Letter Code and Letter Dt (letter date)	If you printed a letter with the code that is specified in the **Letter Code** field, the system displays the date that the letter was printed. This field applies only to course sessions that are administered in house.

(AUS) Study Bank

Field or Control	*Description*
From Date and **To Date**	Enter start and end dates of study periods associated with this course.
Study hrs/wk (study hours per week)	Enter number of study hours per week associated with this course.
Travel hrs/wk (travel hours per week)	Enter number of travel hours per week associated with this course.

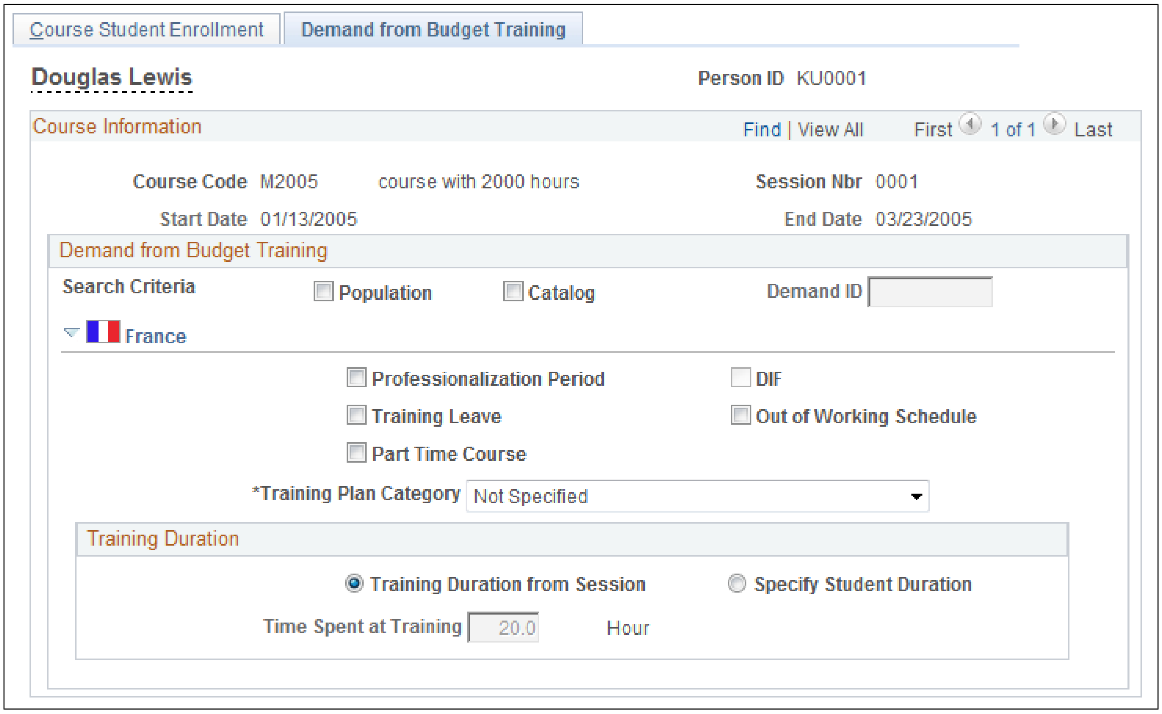
Demand from Budget Training Page

Use the Demand from Budget Training page (COURSE_STUDNT_ENR2) to specify how a course that a student has completed or is enrolled in should be billed to a business unit and department.

Navigation:

Administer Training > **Student Enrollment** > **Enroll in Course** > **Demand from Budget Training**

This example illustrates the fields and controls on the Demand from Budget Training page. You can find definitions for the fields and controls later on this page.



On this page, you link enrollments with a training demand that you defined for budgeting purposes. This enables the system to compute the ratio of planned training costs to actual costs.

Search Criteria

To locate the right demand ID, use the Population and Catalog check boxes or both to filter the demands.

Field or Control	***Description***
Population	Select to filter demands based on the employee's department, job code, and competencies.
Catalog	Select to filter demands based on the course code.
Demand ID	Enter the demand ID. The Population and Catalog check boxes determine the list of demands from which you can select.

(FRA) France

The fields in this section apply to 2483 reporting for France.

Field or Control	***Description***
Professionalization Period	Select if course enrollment occurs as part of a professionalization contract.
DIF	Select the DIF check box to activate the DIF fields on the Training Hours Details secondary page. When this check box is selected, the system sets the Session Cut DIF Duration on the secondary page to the Session Cut Duration for all session cuts that have a status of *Awaiting Review.* When the check box is deselected, the DIF related rows are hidden on the secondary page and all DIF values are set to zero.
Out of Working Schedule	Select to track enrollments out of the working schedule that trigger training allocation payments from the payroll system. There are two allocations for training out of the working schedule: one is for DIF training, and the other is for skills development training. When this check box is selected, the **Duration out of Working Schedule** field on the Training Hours Details page is set to the Session Cut Duration for all session cuts that have a status of *Awaiting Review.* **Note:** If you select **Out of Working Schedule** but do not select **DIF,** you must set the **Training Plan Category** to *Skills Development* to enable allocations from the payroll system. **Note:** The system automatically prevents you from changing the DIF and Out of Working Schedule options when all session cuts in a training session have a status other than *Awaiting Review.*
Track Training Hours Details	Click the link to access the Training Hours Details page. On this page, enter DIF and Non-DIF hours for training sessions as well as session segments or "cuts."

Training Duration

Use the fields in this group box to specify the source of training duration data.

Field or Control	Description
Training Duration from Session	When **Training Duration from Session** is selected, the time spent at training is equal to the session duration entered on the Course Session Profile page of the Course Sessions component (COURSE_SESSN_TBL1).
Specify Student Duration	When **Specify Student Duration** is selected, you must enter the training duration in the Session Cut Duration (total duration) field on the Training Hours Details secondary page.

Note: You cannot change the Training Duration radio button options when all session cuts in a training session have a status other than *Awaiting Review.*

Session Durations

This group box displays summary information from the Session Cut Duration group box on the Training Hours Details page.

Note: The information in this group box is updated when you click the Refresh button on the Training Hours Details page.

Related Links

Understanding Training Demand

Training Hours Details Page

Use the Training Hours Details page (TRN_DIF_ENROLL_SEC) to track training durations for each training type (DIF, Non-DIF).

Navigation:

Click the **Track Training Hours Details** link on the Demand from Budget Training page.

Because the DIF entitlement is updated monthly by a payroll calculation and a session can extend over multiple months, you must track the DIF hours for each session cut on the Training Hours Details page.

Field or Control	Description
Course Start Date and Course End Date	The dates displayed here are the dates specified on the Location, Instructor page (Enterprise Learning, Define Course/Cost Details, Course Sessions). By default, a session contains at least one session cut with the same begin and end dates as the overall session period. However, when there are multiple session cuts in a session, each session cut must be defined with its own begin and end dates included in the overall session period. **Note:** Define the dates of the entire session period on the Course Session Profile page (Enterprise Learning, Define Course/Cost Details, Course Sessions)

Session Cut Durations

Use the fields in this group box to enter the session cut duration, the duration out of the working schedule, the total DIF duration, and the DIF duration out of the working schedule.

Field or Control	Description
Session Cut Duration	This field in the Total Duration column becomes available for data entry when you select the **Specify Student Duration** radio button on the Demand from Budget Training page. Otherwise, this field is display-only and shows the duration specified for the session cut on the Location, Instructor page. By default, the Duration out of Working Schedule column is hidden. When the Out of Working Schedule check box is selected on the Demand From Budget Training page, the Duration out of Working Schedule column appears and is automatically populated with the session cut duration. You can change this duration if needed. **Note:** The value entered in this field is valid if the Session Cut Duration >= Duration out of Working Schedule >= 0.

Field or Control	***Description***
Session Cut DIF Duration	This row becomes available for data entry when you select the DIF check box on the Demand From Budget Training page. Use the Session Cut DIF Duration field to enter the number of hours dedicated to DIF both in and out of the working schedule in relation to the Session Cut Duration. Note that the Out of Working Schedule column is visible only when the Out of Working Schedule check box is selected on the Demand From Budget Training page. By default, the Session Cut DIF Duration is equal to the Session Cut Duration. **Note:** The Session Cut DIF Duration is valid if the Session Cut Duration >= Session Cut DIF Duration >= 0. The second column is valid if the Session Cut DIF Duration >= Session Cut DIF Duration out of Working schedule >= 0.
Session Cut Non-DIF Duration	This row appears when you select the DIF check box on the Demand From Budget Training page and is display-only. The system calculates the Session Cut Non-DIF Duration as the difference between the two previous rows (Session Cut Non-DIF Duration = Session Cut Duration - Session Cut DIF Duration). The system calculates the Duration Out of Working Schedule in the same way. **Note:** Click the Refresh button at the bottom of the page to calculate or update the values displayed in this field.

Field or Control	Description
Session Cut Status	Valid values are: • *Awaiting Review:* Indicates that the training durations have been specified or have to be specified. The user can change all values on the page when the status is *Awaiting Review* (all fields are enabled). • *Appr by Training Administrator:* Indicates that the training durations have been validated by the Training Administrator and cannot be changed for the session cut. When the status is *Appr by Training Administrator,* all fields are disabled except the**Session Cut Status** field. If the training administrator wants to change any values, he/she needs to reset the status to *Awaiting Review.* • *Appr by Payroll Administrator*: Indicates that the training durations have been approved by the payroll administrator. When this status is set, all fields are disabled, including the Session Cut Status field (the training administrator cannot change any values on the page). • *Finalized*: Indicates that the training information has been processed and that the administrator no longer needs to manage the information. When the status is Finalized, all fields on the page are disabled, including the **Session Cut Status** field (the Training Administrator cannot change any values).

Note: To make a course eligible for DIF funding, you must select the **Eligible for DIF** check box on the Course Profile page (Enterprise Learning, Define Course/Cost Details, Courses, Course Profile).

Session Durations

This group box contains a summary of information from the Session Cut Duration group box for all session cuts.

DIF Information

This group box displays DIF entitlement information imported from the payroll system.

Field or Control	Description
As of Date	Use this field to view past DIF entitlements. To do this, enter an as of date and click the Refresh button. The default value is the date of the latest computed entitlement.

Field or Control	*Description*
DIF Entitlement	This field displays the number of hours available for DIF training. This information is imported from the payroll system using the writable array FOR WA DIF HR.
DIF in Advance	This field displays the amount of DIF in advance. This information is imported from the payroll system using the writable array FOR WA DIF HR.

Note: Click the Refresh button to update the automatically calculated values on the page.

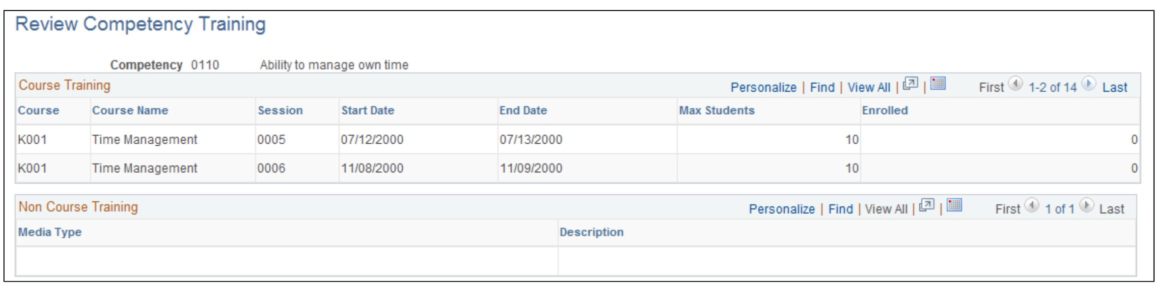
Review Competency Training Page

Use the Review Competency Training page (COMP_TRAINING) to search for training courses that address a selected competency.

Navigation:

Workforce Development > **Profile Management** > **Profiles** > **Review Competency Training** > **Review Competency Training**

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



This page lists courses that are designated for the competency that you select.

(USF) Tracking Federal Training Requests

When you request training, you assign a status to the request, and the system routes it to authorizing and approving officials according to the agency's requirements. After reviews and approvals, the system enrolls or wait-lists the students.

The following pages are used for training tasks:

- To request training, use the Student Enrollment - Enroll Individually page.

- To directly enroll or wait-list students in training course sessions, and to enter students' grades for completed sessions, use the Create/Update Course Wait List page or the Student Enrollment - Enroll Individually page.
- To review and print an employee's training request information, use the Student Enrollment - Enroll Individually page or the Review Training Summary page.

Page Used to Track Training Requests

Page Name	*Definition Name*	*Navigation*	*Usage*
Enroll Individually	COURSE_ENROLLMENT	**Administer Training** > **Student Enrollment** > **Enroll Individually** > **Enroll Individually**	Track and review the courses that an individual student has requested and print the Training Request Form (SF182).

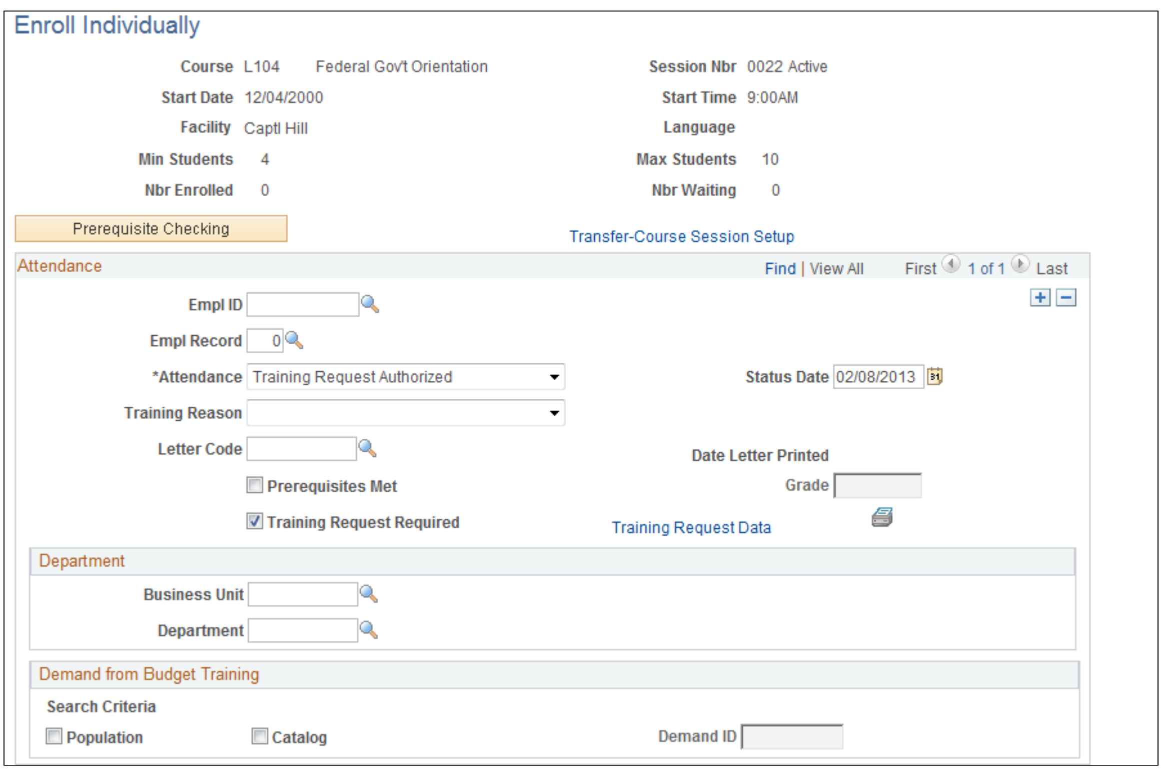
Enroll Individually Page

Use the Enroll Individually page (COURSE_ENROLLMENT) to track and review the courses that an individual student has requested and print the Training Request Form (SF182).

Navigation:

Administer Training > **Student Enrollment** > **Enroll Individually** > **Enroll Individually**

This example illustrates the fields and controls on the Enroll Individually page showing the federal fields. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Course, Session Nbr, and **Attendance**	To add a course, insert a row and select the course, session number, and attendance status.
Training Request Required	Select the **Training Request Required** check box to make the **Training Request Data** link available.
Training Request Data	Click the link to view the Employee Training Request Data (USF) page and enter or view training request information. Click to print the Training Request Form (SF-182). The form is printed after you have completed and saved training request information.
Print SF182 (icon)	Click to print the Print SF-182 icon to have the form printed after you have completed and saved training request information.

Reviewing Training-Related Employee Data

As you administer training programs, you can review and update other employee training-related information, such as education, competencies and languages, and the results of tests. This information is stored in employees' personal profiles that are set up and maintained using the Manage Profiles business process

Related Links

“Understanding Profile Management” (PeopleSoft Human Resources Manage Profiles)

Running Student Training Reports

This topic discusses how to generate reports of employee training records.

Pages Used to Run Student Training Reports

Page Name	Definition Name	Navigation	Usage
Training Student Programs	RUNCTL_TRN020	**Administer Training** > **Training Reports** > **Training Student Programs** > **Training Student Programs**	List the courses and sessions completed by a student. This is a BI Publisher report.

Page Name	***Definition Name***	***Navigation***	***Usage***
Administer Training Programs	RUNCTL_TRN021	**Administer Training** > **Training Reports** > **Administer Training Programs** > **Administer Training Programs**	List the training program for an employee. This is an SQR report.

Chapter 9

Tracking Training Costs

Understanding Training Cost Tracking

These topics list common elements and discuss student reimbursement processing.

Common Elements Used to Track Training Cost

Field or Control	***Description***
Data Override and **Override**	Select to manually change costs that are associated with a student for a specific course session. Cost fields become available. Selecting **Data Override** prevents the Compute Student Costs process (TRN013) to override costs entered by you. **Note:** Once you change the default values on a page, you cannot select the **Data Override** check box again. ***Warning!*** When you rerun the Compute Student Cost process (RUNCTL_TRN013) with this check box selected, the system overwrites the data on that page with new calculation results.
EE Qty (employee quantity)	Defines the number of units of equipment or materials. Can also define the number of units of the Expense Type value on the page that the employee used as part of the course session.
Per Employee Cost	Displays the costs per employee. The appropriate currency is defined in the field next to this field. You can override the costs by selecting the **Data Override** check box.
(FRA) Financed Cost, Financing Fund, and **Financing Department**	Use these fields to define the additional facility information that is used to generate the French Training Report 2483. Enter the financed cost if the student's training is financed by an external organization. Select the financing fund that is used to finance the student's training costs. Set up financing funds in the Vendor table. Select the department that is financing the student's training costs.

Student Reimbursement Processing

You can use HR to handle student reimbursements for external course expenses. The system calculates reimbursable amounts according to the schedules that you create. In the Budget Training business process, the system updates training costs as students complete courses and are reimbursed for training expenses and posts those costs against your organization's training budget.

Defining and Tracking Reimbursable Tuition Expenses

These topics discuss how to define and track reimbursable expenses.

Note: The reimbursement information that you track here is for informational purposes only and does not affect payroll processing in Human Resources Management (HCM).

Pages Used to Define and Track Reimbursable Expenses

Page Name	***Definition Name***	***Usage***
Tuition Expense Type Page	TRN_EXPNS_TYP_GBL	Define the types of training expenses that are reimbursable, define the percentage that is reimbursable, and set up a reimbursable limit.
Maintain Tuition Reimbursement Page	TRN_TUITION_REIMB	Track reimbursable expenses.

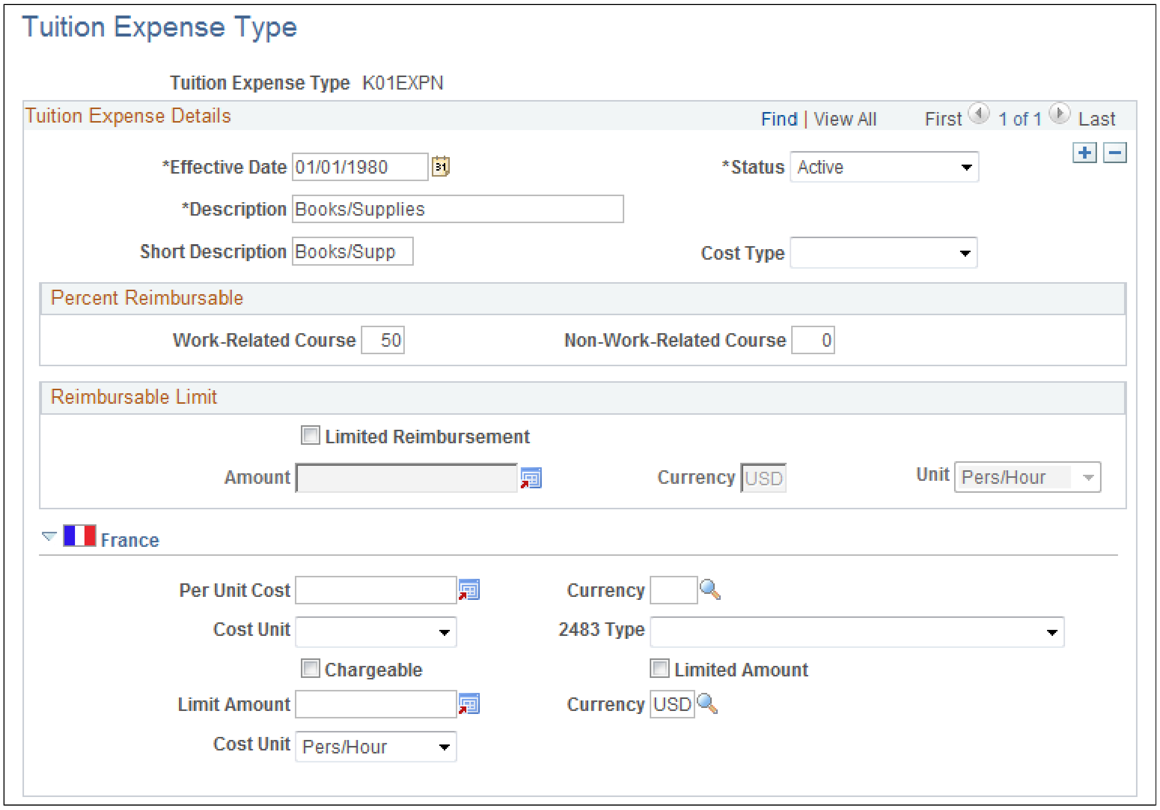
Tuition Expense Type Page

Use the Tuition Expense Type page (TRN_EXPNS_TYP_GBL) to define the types of training expenses that are reimbursable, define the percentage that is reimbursable, and set up a reimbursable limit.

Navigation:

Set Up HCM > **Product Related** > **Enterprise Learning** > **Tuition Expense Type** > **Tuition Expense Type**

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



Field or Control	Description
Cost Type	Select *Direct* or *Indirect.*

Percent Reimbursable

Field or Control	Description
Work-Related Course and **Non-Work-Related Course**	Enter the percentage of the expense that is reimbursable. You can have different percentages for work-related and non-work-related courses.

Reimbursable Limit

Define reimbursable limits to help track tuition reimbursement costs.

Field or Control	Description
Limited Reimbursement	Select to limit the amount that the students are reimbursed. The system makes the **Amount** and **Cost Unit** fields available.

Field or Control	*Description*
Amount and **Cost Unit**	Enter the reimbursable limit and select the associated unit. For example, you can specify a flat cost, such as 100 USD, or limit the amount that is reimbursed for a period, such as 100 USD, per person per year.

(FRA) France

Define additional expense data for 2483 report requirements.

Field or Control	*Description*
2483 Type	Select an expense type. Options are *Equipment, Furniture, Instructor Lodging & Transport, Instructor, Student Lodging & Transport, Non-Instructor* (non-instructor-related expenses), and *Student Restaurant.*
Chargeable	Select to make the training course a chargeable item for the 2483 report. When selected, related costs that you entered are reported in the 2483 report. This is used to meet French legal reporting requirements. The default value derives from the chargeable flag set in the Course setup page and by the Compute Student Cost process.
Limited Amount	Select if the expense amount is restricted to a specific value. The system makes the **Limit Amount** and **Cost Unit** fields available. The limit amount is applied when computing the chargeable cost.
Limit Amount, Currency, and **Cost Unit**	Enter the limit amount and select the associated unit. For example, to limit hotel lodging to FRF 2000 per person per day, enter *2000* in the **Limit Amount** field and select *Pers/ Day* in the **Cost Unit** field. **Note:** The quantity also applies to the limit. For example 2 meals that are paid by the same student costs 20 EUR pers/day, qty = 2. If the charge is only 15 EUR pers/day, the limit will be 15*2 = 30 EUR pers/day.

Related Links

Understanding the French Training Report 2483 Process

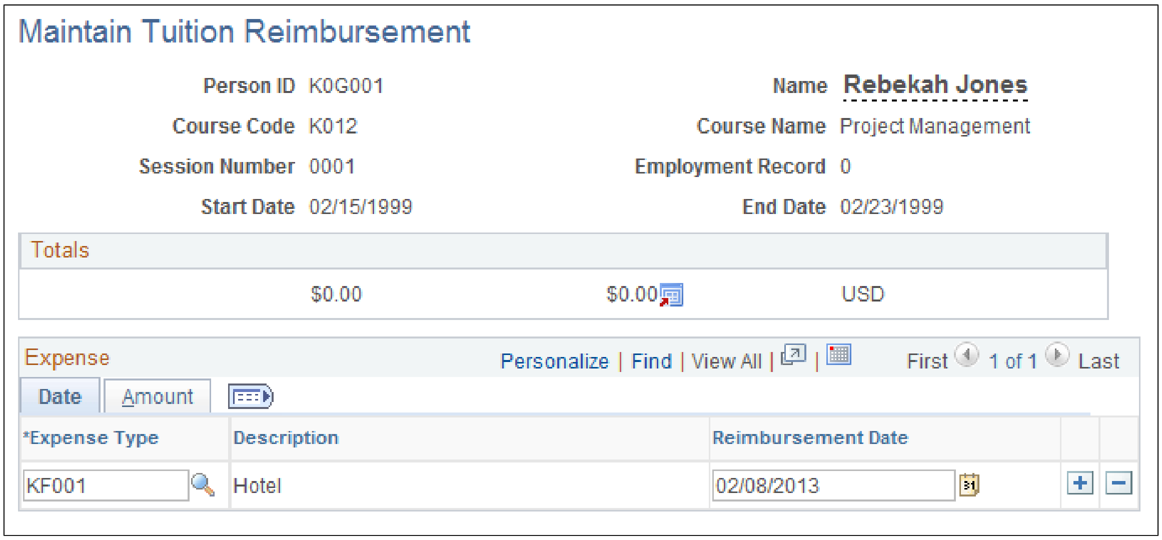
Maintain Tuition Reimbursement Page

Use the Maintain Tuition Reimbursement page (TRN_TUITION_REIMB) to track reimbursable expenses.

Navigation:

Administer Training > **Cost Analysis** > **Maintain Tuition Reimbursement** > **Maintain Tuition Reimbursement**

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



You can track all expense types for which you usually reimburse students, including tuition, textbooks, and ancillary materials.

You can enter and update tuition reimbursements only for courses where students have a status of *Enrolled, Currently Attending,* or *Completed.* You update (or the system updates) the student status on the Enroll Individually and Student Training pages.

Totals

Displays the sum of the amounts in the Expense Amount field on the Date tab and the sum of the amounts in the Amount Reimbursed field and the currency code from the Amount tab.

Date Tab

Field or Control	***Description***
Expense Type	Select an expense type from the types that you created on the Tuition Expense Type page.

Amount Tab

Field or Control	***Description***
Work Rltd (work-related) and **Amount Reimbursed**	Select if the course is work-related. The system calculates the amount that is to be reimbursed to the student based on the percentages that you entered on the Tuition Expense Type table. You can set up different percentages for work-related and non-work-related courses. If you have set a reimbursable limit on the Tuition Expense Type table, and you select this check box, the system calculates the amount that is to be reimbursed. If the limit is exceeded, the system displays a warning message and adjusts the **Amount Reimbursed** value. You can continue with the reduced amount or update the amount reimbursed.

Related Links

Selecting the Base Currency for Training Costs

Calculating and Maintaining Student Costs

To calculate student costs for a course session, run the Compute Student Costs process. This process splits out the training costs to the employee level using cost information that is specified at the course, course catalog, and course session levels.

The process calculates the training cost for each employee in the specified session, for the specified budget period, and populates the tables that store employee training cost component information as follows:

Cost Component	***Table***
Salary	TRN_EESAL_COST
Vendor	TRN_EEPROV_COST
Facility	TRN_EEFACIL_COST
Equipment	TRN_EEEQUIP_COST
Instructor	TRN_EEINST_COST
Employee Expense	TRN_EEEXPN_COST

Cost Component	***Table***
Session Expense	TRN_SSEXPN_COST

Once you've run this process, you can view the results in the Track Student Cost component. Adjustments that you make to the cost information in that component override the cost information that is calculated by the process.

The Compute Student Costs process affects the 2483 Training Report as follows:

- Splits session costs and computes the company cost, the financed cost and the chargeable cost for each student.
- Updates the employee salary costs.
- Determines if the cost is chargeable and sets the chargeable flag in the Maintain Student Costs page.
- Imports external expenses.

These topics discuss how to:

- Run the Compute Student Costs process.
- (FRA) Review and update vendor costs.
- (FRA) Update and maintain facility costs.
- (FRA) Update and maintain equipment costs.

Pages Used to Calculate and Track Student Costs

Page Name	***Definition Name***	***Usage***
Calculate Student Cost Page	RUNCTL_TRN013	Run the Calculate Student Costs process before you review or update actual training costs at the employee level. This process computes student costs by budget period for the course sessions that you specify as part of the process parameters.
Maintain Student Costs - Salary	TRN_EE_SESSN_CST1	**Administer Training** > **Cost Analysis** > **Maintain Student Costs** > **Salary** Review the employee salary costs that are associated with a course session and budget period.
(FRA) Maintain Student Costs - Vendor Page	TRN_EE_SESSN_CST3	Review and update the vendor costs resulting from the Compute Student Costs process.

Page Name	***Definition Name***	***Usage***
(FRA) Maintain Student Costs - Facility Page	TRN_EE_SESSN_CST5	Review and update the facility costs resulting from the Compute Student Cost process.
(FRA) Maintain Student Costs - Equipment Page	TRN_EE_SESSN_CST7	Review and update training equipment and materials costs resulting from the Compute Student Cost process.
Maintain Student Costs - Instructor	TRN_EE_SESSN_CST4	**Administer Training** > **Cost Analysis** > **Maintain Student Costs** > **Instructor** Review and update the training instructor costs resulting from the Compute Student Cost process.
Track Student Costs - Employee Expense	TRN_EE_SESSN_CST2	**Administer Training** > **Cost Analysis** > **Maintain Student Costs** > **Employee Expense** Update the employee expense costs resulting from the Compute Student Costs process.
Maintain Student Costs - Session Expense	TRN_EE_SESSN_CST6	**Administer Training** > **Cost Analysis** > **Maintain Student Costs** > **Session Expense** Update the expense costs resulting from the Compute Student Cost process.
EE Session Cost Summary (employee session cost summary)	RUNCTL_TRN032	**Administer Training** > **Training Reports** > **EE Session Cost Summary** > **EE Session Cost Summary** Run the EE Session Cost Summary report (TRN032). This report lists the costs that are associated with an employee who is attending a course. Costs are for salary, vendor, facility, equipment, instructor, employee expense, and session expense. This is an SQR report. You must run the Compute Student Cost process before you run this report. The EE Session Cost Summary job runs two processes to produce the report.

Calculate Student Cost Page

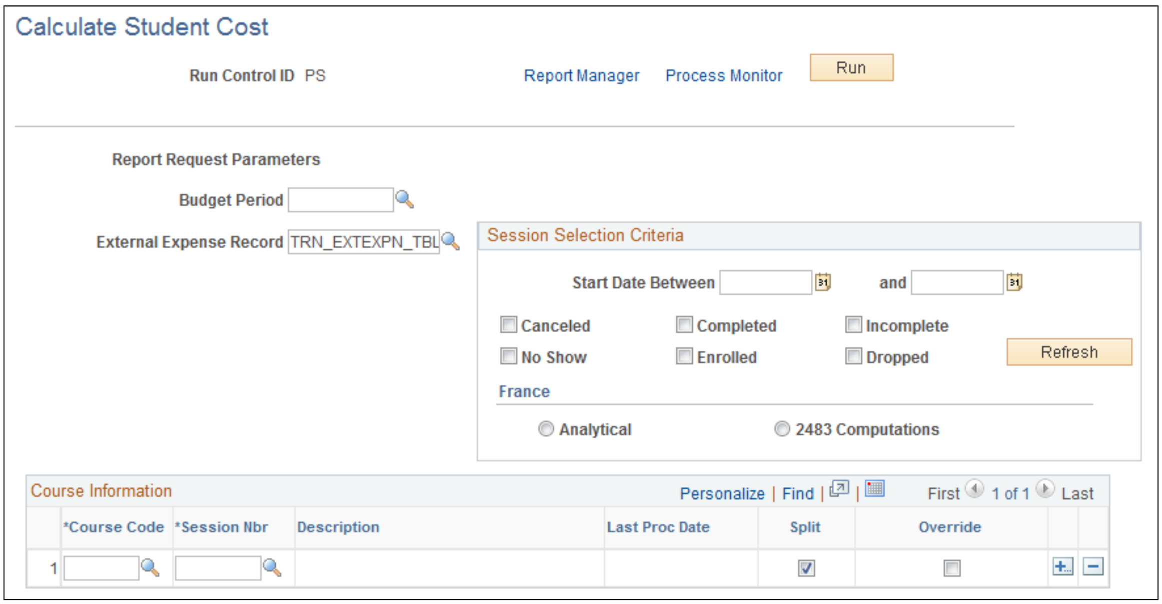
Use the Calculate Student Cost page (RUNCTL_TRN013) to run the Calculate Student Costs process before you review or update actual training costs at the employee level.

This process computes student costs by budget period for the course sessions that you specify as part of the process parameters.

Navigation:

Administer Training > **Cost Analysis** > **Calculate Student Cost** > **Calculate Student Cost**

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



Field or Control	***Description***
External Expense Record	Students' travel and lodging expenses. **Note:** When training expenses are managed by another system other than PeopleSoft, it is possible to import costs from the external system via a table. The table that is used as the interface between PeopleSoft and the other system should be filled with costs to be imported. When running the process, costs specified into this interface table are imported into TRN_EEEXPN_COST.

Session Selection Criteria

Field or Control	***Description***
Start Date Between and and	Select the session start and end dates. When you select a budget period, these dates are populated with values from the Budget Information Table page.
Refresh	Click to populate all the sessions with a similar session start date into the specified dates.
Cancelled, Completed, Incomplete, No Show, Enrolled, and **Dropped**	Select to include students with each status for the selected course and session.
France	Select either the **Analytical** button or the **2483 Computations** button. Select Analytical to view all the crtieria available. When 2483 Computations is selected, those criteria that are unavailable are greyed out .

Course Information

Field or Control	***Description***
Course Code	The system displays courses that have completed sessions for the selected budget period only.
Session Nbr (session number)	Select from the list of completed sessions.
Last Proc Date (last process date)	Displays the date that you last ran the Compute Student Cost process for the specified course session and budget.
Split	Select to proceed with the process and populate the Track Student Cost pages with the process calculation results.
Override	The process does not automatically alter costs entered manually into the Track Student Costs page (when the Data Override check box is selected on that page). To force the process to store computed costs into the Trainees Salary Costs page, select this check box.

See product documentation for *PeopleTools: Process Scheduler*

Related Links

Understanding Training Demand

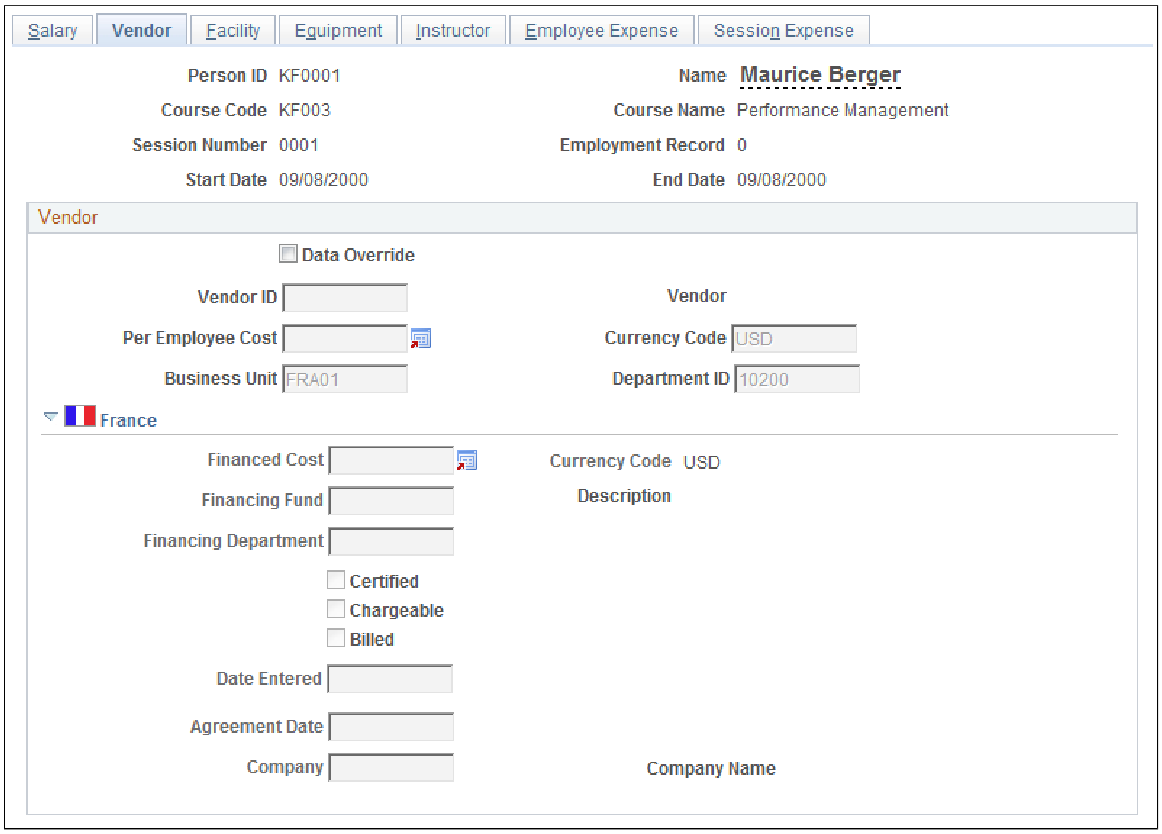
(FRA) Maintain Student Costs - Vendor Page

Use the Maintain Student Costs - Vendor page (TRN_EE_SESSN_CST3) to review and update the vendor costs resulting from the Compute Student Costs process.

Navigation:

Administer Training > **Cost Analysis** > **Maintain Student Costs** > **Vendor**

This example illustrates the fields and controls on the Maintain Student Costs - Vendor page. You can find definitions for the fields and controls later on this page.



Define additional vendor information to be tracked for legal reporting.

Field or Control	***Description***
Certified, **Chargeable** and **Billed,**	For legal reports, select any check box that is applicable.

Field or Control	*Description*
Date Entered	Enter date that the invoice was entered for the vendor. **Note:** The **Date Entered** field is activated when the **Billed** date is activated. This is 2483 specific. To be chargeable, a vendor should be certified, chargeable, have an invoice with the **Billed** date included within the declaring year and a valid agreement number should be specified if the **Vendor Type** is *Consulting Firm* or *Training Provider.*
Agreement Date and **Company**	Enter the agreement date and the name of the company that signed the agreement.

Related Links

Selecting the Base Currency for Training Costs
Understanding the French Training Report 2483 Process

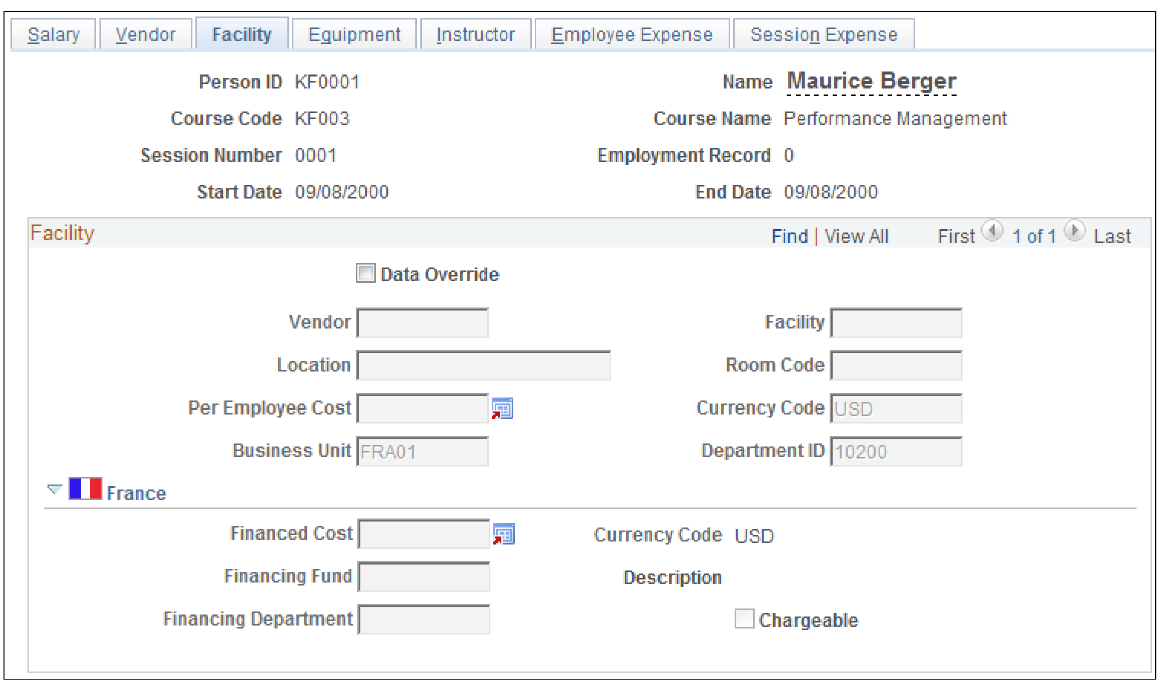
(FRA) Maintain Student Costs - Facility Page

Use the Maintain Student Costs - Facility page (TRN_EE_SESSN_CST5) to review and update the facility costs resulting from the Compute Student Cost process.

Navigation:

Administer Training > **Cost Analysis** > **Maintain Student Costs** > **Facility**

This example illustrates the fields and controls on the Maintain Student Costs - Facility page. You can find definitions for the fields and controls later on this page.



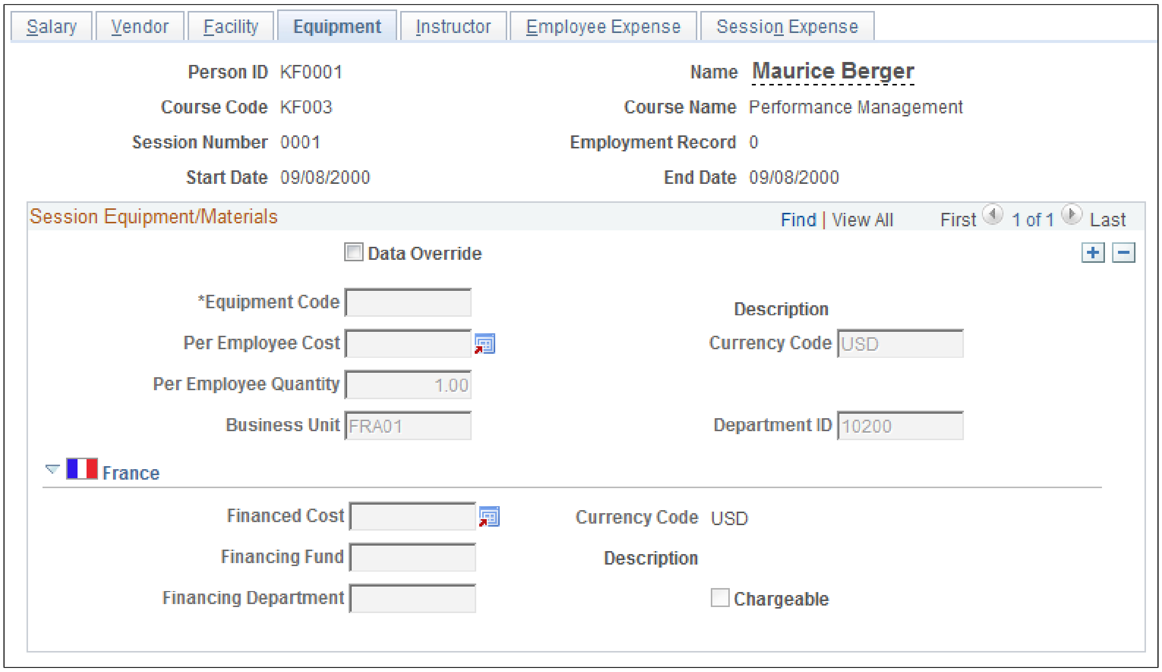
(FRA) Maintain Student Costs - Equipment Page

Use the Maintain Student Costs - Equipment page (TRN_EE_SESSN_CST7) to review and update training equipment and materials costs resulting from the Compute Student Cost process.

Navigation:

Administer Training > **Cost Analysis** > **Maintain Student Costs** > **Equipment**

This example illustrates the fields and controls on the Maintain Student Costs - Equipment page. You can find definitions for the fields and controls later on this page.



(FRA) Updating Training Cost Data Imported from Learning Management

When training costs are deleted or cost types changed in Learning Management for data already imported into Administer Training, the original imported data is not automatically deleted from Administer Training and must be deleted manually.

Page Used to Purge Deleted ELM Cost Data

Page Name	***Definition Name***	***Navigation***	***Usage***
Load ELM Messages	TRN_ELM_LOAD_MSG	**Administer Training** > **ELM Integration** > **Load ELM Messages** > **Load ELM Messages**	Enter costs to be purged from Administer Training.

Updating Actual Training Costs

The Update Planned and Real Costs process updates the actual training costs that you're tracking in the Administer Training business process. You can post these costs against the training budget in the Budget Training business process.

Once you run the Update Planned and Real Cost Process, you can examine how you've spent your training budget, using online inquiry pages that detail the budgeted costs for your organization and any unbudgeted costs that you incurred as part of training your employees. Also, you can look at how your organization's total budgeted costs compare to what you spent on training at the end of the budget period, or at any point along the way, to examine how the projected expenditures compare to what you've spent.

Note: Run this process only if you have set up a training budget using the Budget Training business process and have been tracking actual training costs in the Administer Training business process.

Page Used to Run the Update Planned and Real Cost Process

Page Name	***Definition Name***	***Navigation***	***Usage***
Calculate Planned/Real Costs	RUNCTL_TRN012	**Administer Training** > **Cost Analysis** > **Calculate Planned/Real Costs** > **Calculate Planned/Real Costs**	Run the Update Planned and Real Cost process.

Calculate Planned/Real Costs Page

Use the Calculate Planned/Real Costs page (RUNCTL_TRN012) to run the Update Planned and Real Cost process.

Navigation:

Administer Training > **Cost Analysis** > **Calculate Planned/Real Costs** > **Calculate Planned/Real Costs**

This example illustrates the fields and controls on the Calculate Planned/Real Costs page. You can find definitions for the fields and controls later on this page.

Field or Control	Description
Budget Period	You can update costs for any predefined budget period, but you'll want to run the process only against the current budget period, because you need to have recorded actual training costs to obtain meaningful cost results. You can run the process anytime during the current budget period to see how projected training spending compares to actual expenditures. **Note:** The budget period needs to be frozen for the process to execute properly.
Base Currency	When you move out of the **Business Unit** field, the system displays the base currency for that business unit. When the system calculates the costs for this budget period and business unit, it converts the costs to the base currency shown here. Then you can compare training expenditures and budget amounts in the same currency.

When the system executes the Update Planned and Real Costs process, it calculates totals for all cost elements for each training demand that is associated with the selected budget period and business unit and compares the totals to the total training budget.

See product documentation for *PeopleTools: Process Scheduler*.

Related Links

Creating Global Scenarios

Reviewing Training Costs

These topics discuss how to review training costs.

Pages Used to Review Training Costs

Page Name	***Definition Name***	***Usage***
Budgeted Page	TRN_BDGT_ACT_COST	Review budgeted costs compared to actual training costs.
Unbudgeted Page	TRN_NOTBDGT_COST	Review current unbudgeted training costs. Costs can include projected costs without any actual expenditure, if you have not spent the projected amount.
Summary Page	TRN_CMPSUMMRY_COST	Compare budgeted and actual training cost totals.

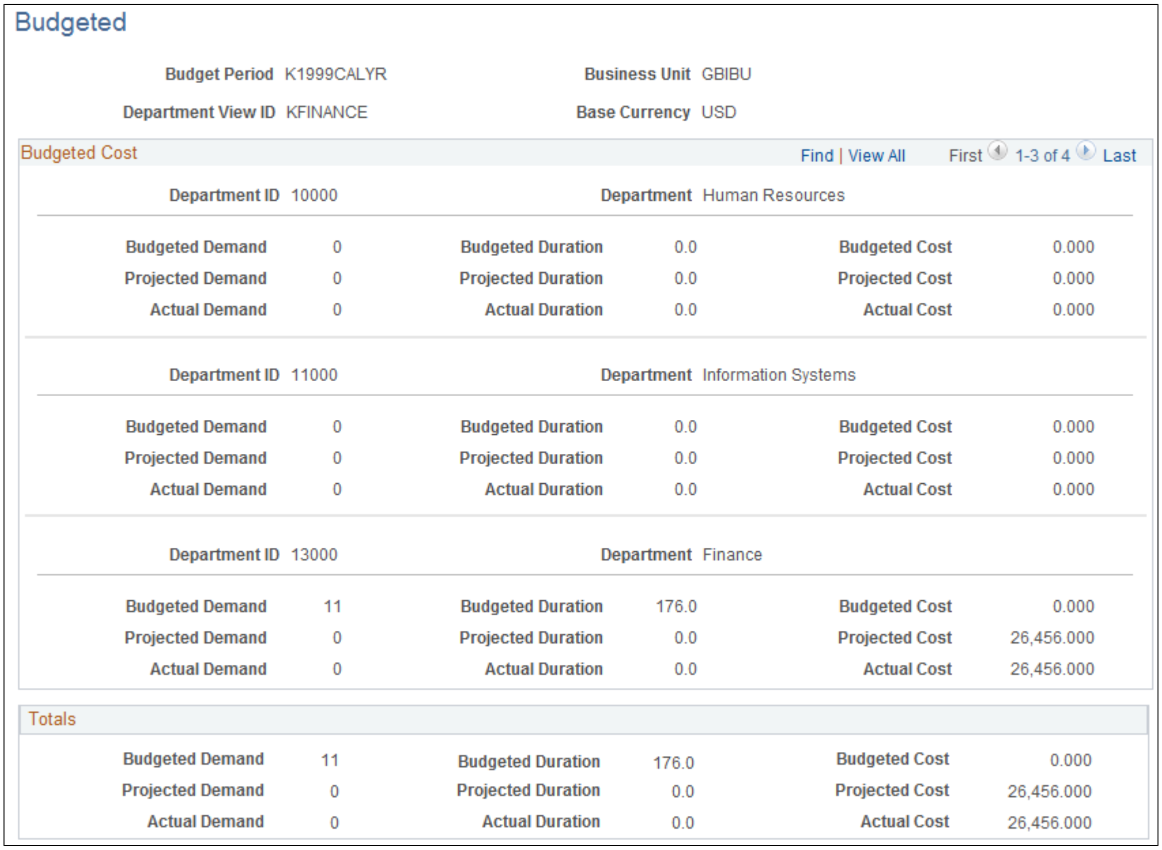
Budgeted Page

Use the Budgeted page (TRN_BDGT_ACT_COST) to review budgeted costs compared to actual training costs.

Navigation:

Administer Training > **Cost Analysis** > **Review Costs** > **Budgeted** > **Budgeted**

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



Note: In the departmental view, to see all the budgeted training versus the current training information for all departments, you may need to scroll down the page.

Related Links

Tracking Training Plans

Defining Default Training Costs

Selecting the Base Currency for Training Costs

Unbudgeted Page

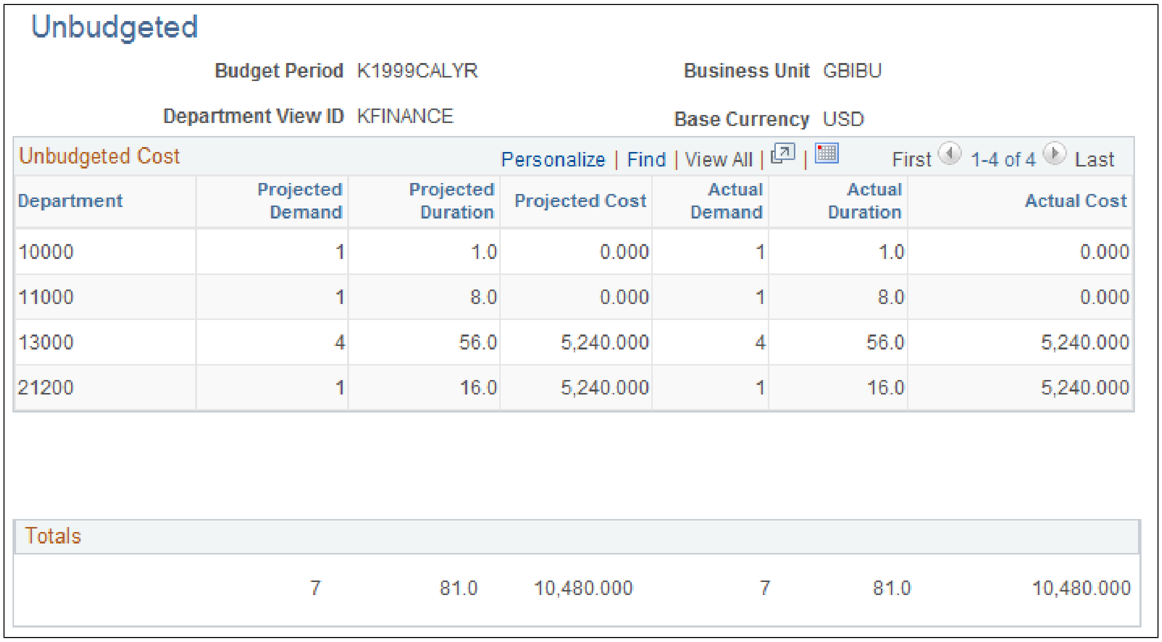
Use the Unbudgeted page (TRN_NOTBDGT_COST) to review current unbudgeted training costs.

Costs can include projected costs without any actual expenditure, if you have not spent the projected amount.

Navigation:

Administer Training > **Cost Analysis** > **Review Costs** > **Unbudgeted** > **Unbudgeted**

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



Unbudgeted

Budget Period K1999CALYR Business Unit GBIBU

Department View ID KFINANCE Base Currency USD

Unbudgeted Cost Personalize | Find | View All | First 1-4 of 4 Last

Department	Projected Demand	Projected Duration	Projected Cost	Actual Demand	Actual Duration	Actual Cost
10000	1	1.0	0.000	1	1.0	0.000
11000	1	8.0	0.000	1	8.0	0.000
13000	4	56.0	5,240.000	4	56.0	5,240.000
21200	1	16.0	5,240.000	1	16.0	5,240.000

Totals

7	81.0	10,480.000	7	81.0	10,480.000

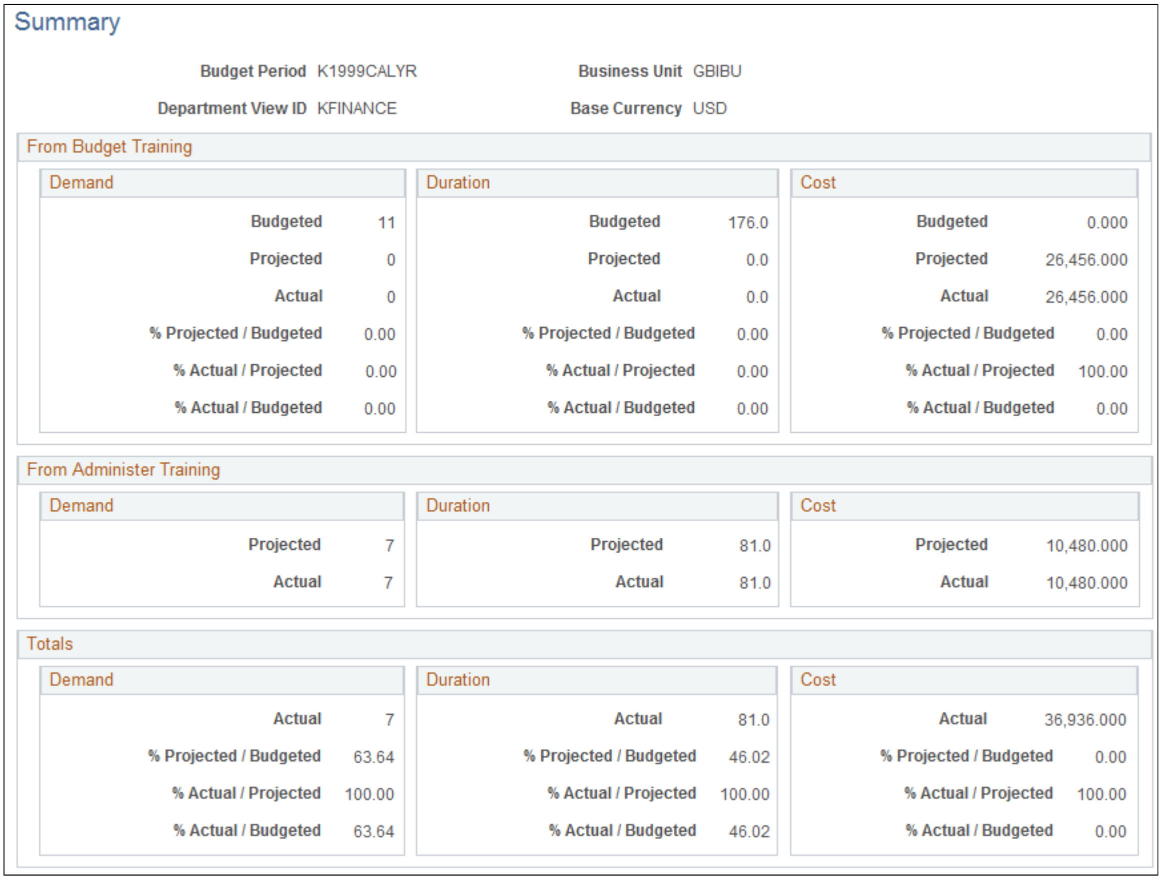
Summary Page

Use the Summary page (TRN_CMPSUMMRY_COST) to compare budgeted and actual training cost totals.

Navigation:

Administer Training > **Cost Analysis** > **Review Costs** > **Summary** > **Summary**

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



From Budget Training

These results include all the demands that you budgeted for in the Budget Training business process.

For all of the budgeted training costs for the specified budget period, business unit, and departments in the departmental view ID), the system provides demand, duration and cost information as follows:

Category	***Demand***	***Duration***	***Cost***
Budgeted	Budgeted total demand (number of employees to be trained).	Budgeted total training duration that you estimated as part of the training budget.	Total budgeted training cost.

Category	***Demand***	***Duration***	***Cost***
Projected	Projected (current realized) training demand (number of employees that are enrolled or are in training).	Projected (current realized) duration for the training that has occurred to date.	Projected cost for the training to date. The projected amounts here include those students that have been enrolled in the course sessions for that budget period, including those who have completed the course.
Percent of projected (realized) cost compared to budgeted cost	Projected (realized) demand compared to budgeted demand.	Projected (realized) duration compared to budgeted duration	Projected cost compared to budgeted cost. This represents the budget percentage you've projected that you will spend to date. Remember that you haven't actually spent this money yet, because it is only projected.
Actual training expenses incurred to date	Actual number of employees trained (demand).	Actual total training duration to date.	Actual cost to date.
Percentage of actual costs compared to projected costs	Actual number of employees trained compared to projected number of employees trained.	Actual duration amount compared to projected training duration amount.	Actual training cost compared to projected training cost. If the amount is 100 percent, then the projected budget amount equals the actual amount that you've spent. If the result is less than 100 percent, you still have projected budget money to spend. If the amount is more than 100 percent, then you've overspent the training budget.
Percentage of actual cost compared to budgeted cost	Actual (realized) demand compared to budgeted demand.	Actual (realized) duration compared to budgeted duration.	Actual (realized) cost compared to budgeted cost. This represents the percentage of the budget that you've spent to date.

From Administer Training

These amounts are for costs that were not included as part of the training budget for the budget period. This includes all training that was tracked in the Administer Training business process but not linked to a budget training demand, as follows:

Category	***Demand***	***Duration***	***Cost***
Projected	Projected (current realized) training demand (number of employees that are enrolled or are in training).	Projected (current realized) duration for the training that has occurred to date.	Projected cost for the training to date. The projected amounts here include those students that have been enrolled in the course sessions for that budget period, including those that have completed the course.
Actual	Actual unbudgeted employees trained.	Actual unbudgeted training duration amount.	Actual cost associated with training unbudgeted employees. The actual population is made up of students that have completed the course sessions for that budget period (Attendance status is *Completed*).

Total Actual Costs

These amounts represent a summary of the actual costs, both as part of the training budget and from unbudgeted costs that are tracked in the Administer Training business process, as follows:

Category	***Demand***	***Duration***	***Cost***
Total actual	Total (current realized) training demand (number of employees currently trained or in training.	Total (current realized) duration for the training that has occurred to date.	Total cost for the training to date.
Percentage of total budgeted amount that the projected amount represents	Percentage of total budgeted demand the projected demand represents.	Percentage of total budgeted duration the projected duration represents.	Percentage of the total budgeted cost that the projected cost represents. The projected amounts here include students who have been enrolled in the course sessions for that budget period but have not yet completed the course (Attendance status is other than *Completed*).

Category	***Demand***	***Duration***	***Cost***
Percentage of the total actual amount represented by the total projected amount	Percentage of the total actual demand represented by the total projected demand.	Percentage of the total actual duration represented by the total projected duration	Percentage of the total actual cost represented by the total projected cost. The projected amounts here include those students that have been enrolled in the course sessions for that budget period but have not yet completed the course (Attendance status is other than *Completed*).
Percentage of total budgeted amount that the actual amount represents	Percentage of total budgeted demand that the actual demand represents.	Percentage of total budgeted duration that the actual duration represents.	Percentage of the total budgeted cost that the actual cost represents.

(FRA) Reviewing Employee Session Costs

If you're administering training programs for French workers, you can view a summary of course session cost information for the employee. This inquiry page displays information that is relevant to the French Training Report 2483 and includes information about financed training costs and chargeable amounts that aren't included on the Review Training Summary page.

Use this inquiry page only after you've run the FRA Compute 2483 process and reviewed or updated the employee's cost information on the Track Student Cost component.

Page Used to Review Employee Session Costs

Page Name	***Definition Name***	***Navigation***	***Usage***
Student Ssn Cost Summary FRA (student session cost summary)	TRN_EE_SMR_COST1	**Administer Training** > **Cost Analysis** > **Review Costs** > **Student Ssn Cost Summary FRA** > **Student Ssn Cost Summary FRA**	View a summary of course session cost information for an employee. This page is relevant to French organizations only.

Related Links

Understanding the French Training Report 2483 Process

Student Ssn Cost Summary FRA Page

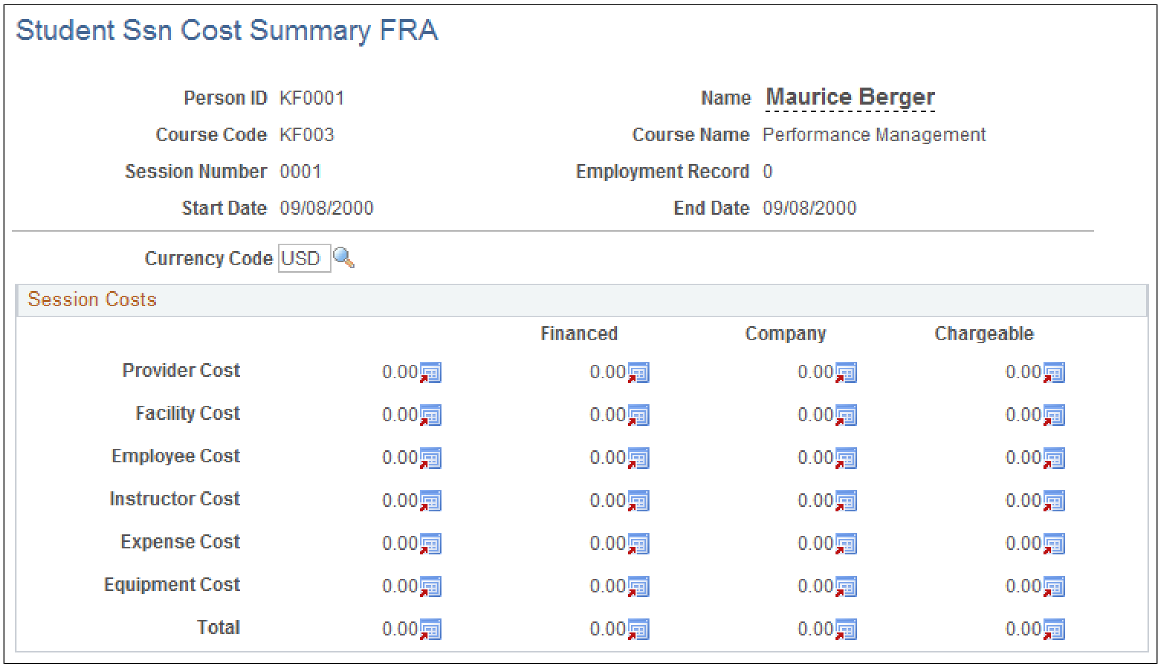
Use the Student Ssn Cost Summary FRA (student session cost summary) page (TRN_EE_SMR_COST1) to view a summary of course session cost information for an employee.

This page is relevant to French organizations only.

Navigation:

Administer Training > **Cost Analysis** > **Review Costs** > **Student Ssn Cost Summary FRA** > **Student Ssn Cost Summary FRA**

This example illustrates the fields and controls on the Student Ssn Cost Summary FRA page. You can find definitions for the fields and controls later on this page.



For each cost that is categorized as a provider, facility, employee cost, instructor, expense, or equipment amount in the France group boxes on the Track Student Cost page, the system displays that cost for the session indicated.

For each charge, the system displays:

- The total amount that is associated with the training category.
- The total financed amount for the training category.
- The total company-contributed amount for the training category.
- The total chargeable amount for the training category. Company costs are calculated as follows: Company Costs = Total Costs − Financed Costs

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Note: The chargeable amount is based on charges for French workers that you indicated as chargeable on the cost pages in the Administer Training business process. Chargeable costs are also reflected in the company-contributed or -financed amount, as indicated in the Course Session Cost table. You can indicate a cost as chargeable in the Course Session Cost French group boxes in Administer Training.

At the bottom of the page, the system displays the total cost for the course session for this student, the total financed amount, the total company-contributed amount, and the total chargeable amount.

Related Links

Understanding the French Training Report 2483 Process

Selecting the Base Currency for Training Costs

Chapter 10

(DEU) Tracking Professional Educational Programs for German Employees

Understanding German Internal Educational Training Programs

Companies in Germany can have their employees follow company-provided professional educational training programs. Companies that offer these programs, called German internal education training programs, can track the steps and status of employees as they work toward their degrees.

To set up and monitor a German internal education training program:

1. Identify the steps that make up the education plan.
2. Group the steps to create a training plan.
3. Enroll an employee in a plan.
4. Enter information about the employee or track the employee's progress.

Setting Up Training Plans and Tracking Employee Progress

These topics discuss how to setup training plans and track employee progress.

Pages Used to Identify Steps, Group Steps, and Track Employee Progress

Page Name	***Definition Name***	***Usage***
Steps DEU Page	IPE_STEP_TABLE	Identify the steps that make up an educational training program.
Plans DEU Page	IPE_PLAN_TABLE	Group the steps into a training plan.
Internal Education DEU Page	EE_IPE_PLAN	Track the progress of German employees who are participating in the training plan.

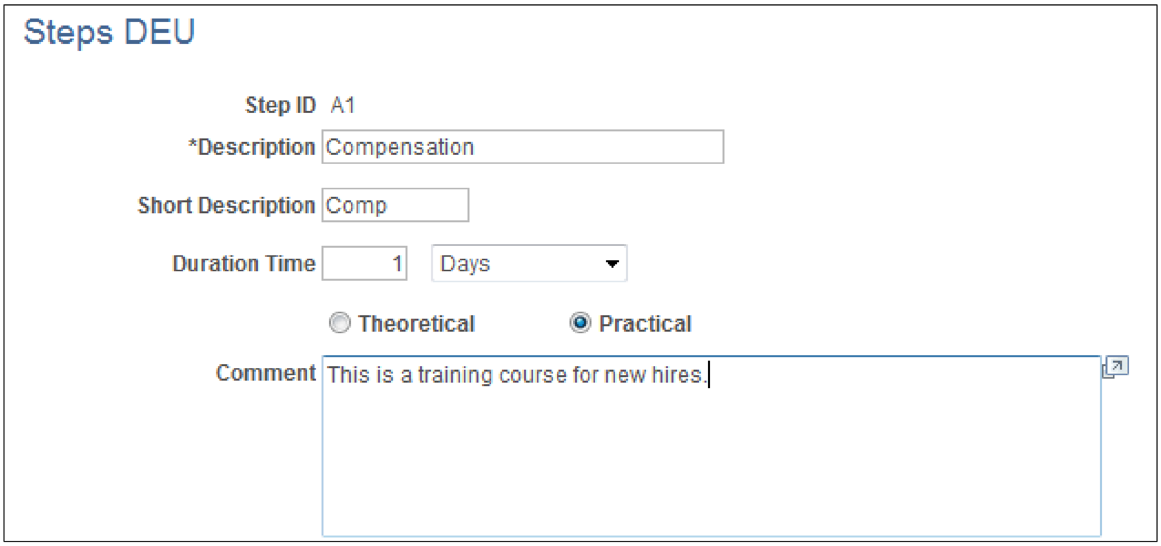
Steps DEU Page

Use the Steps DEU page (IPE_STEP_TABLE) to identify the steps that make up an educational training program.

Navigation:

Set Up HCM > **Product Related** > **Enterprise Learning** > **Steps DEU** > **Steps DEU**

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



Field or Control	*Description*
Duration Time	Enter or update the numeric duration time of the step and select the type of measurement. Values are: *Days, Hours, Months, Weeks,* or *(none).* The duration time that you enter isn't related to Budget Training duration units. These pages don't affect training cost calculations in Budget Training or Administer Training.
Theoretical/Practical	These categories are used by German organizations for training reporting purposes.

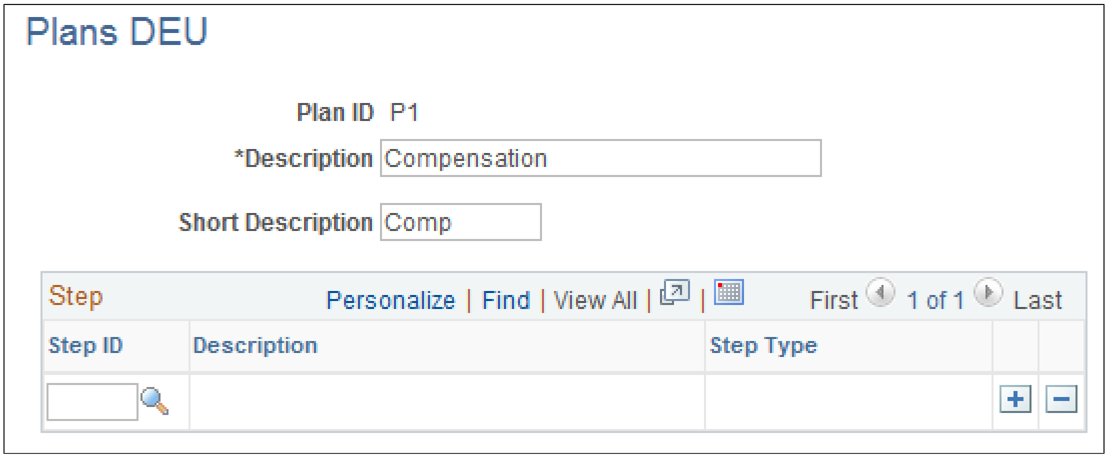
Plans DEU Page

Use the Plans DEU page (IPE_PLAN_TABLE) to group the steps into a training plan.

Navigation:

Set Up HCM > **Product Related** > **Enterprise Learning** > **Plans DEU** > **Plans DEU**

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



Field or Control	*Description*
Step ID	Add or delete the steps that make up this plan. When you add a step, the system displays information about the step.

Enrolling a Person into a Training Plan

To enroll an employee in training plans, create a profile or update the employee's existing profile using the Manage Profiles business process.

Note: Use the profile type PERSON to enroll employees in German internal training plans.

From the Person Profile page (**Administer Training** > **Result Tracking** > **Manage Person Profiles** > **Person Profiles)**:

1. Click the Education link to display the **Education** section of the profile.
2. Click **Add New Degrees** to add a new degree.

   The Add New Degree page is displayed.
3. Select the degree in the **Degree** field.
4. In the German section, select the Intern. Professional Education (internal professional education) check box.

   This enables you to track the employee's progress using the Internal Education DEU page.
5. Complete the remaining fields as required
6. Click **OK** and then click Submit to update the profile.

Related Links

“Person Profile Page” (PeopleSoft Human Resources Manage Profiles)

Internal Education DEU Page

Use the Internal Education DEU page (EE_IPE_PLAN) to track the progress of German employees who are participating in the training plan.

Navigation:

Administer Training > **Result Tracking** > **Internal Education DEU** > **Internal Education DEU**

Use this page to record additional educational information for German employees.

You can also track an employee's progress by printing the German Internal Professional Education Status report.

Note: Click the tabs in the scroll area for multiple views of this page. Document fields that are common to all views first.

Common Page Information

Field or Control	*Description*
Degree	Displays the degree that applies to this training plan.
Date Acquired	Enter the date that the employee acquired the degree.
Plan ID	When you move out of this field, the system displays the plan description and populates the Plan Step table on the page with any step IDs that are associated with this plan.
Step	Displays the step IDs that are associated with the plan that you selected in the **Plan ID** field. You can update the step ID, business unit, and department default values for the plan ID on this page. You can also add step IDs that are not associated with the plan ID, to reflect any variations in the employee's training plan.

Status Tab

Field or Control	*Description*
From Date and **Thru Date** (through date)	Enter when the employee starts and finishes the step.

Chapter 11

(ESP) Managing Tripartite Foundation Communications

Understanding Tripartite Foundation Communications Management

The Spanish Tripartite Foundation for Training (formerly known as FORCEM) is the public body in charge of continuing training for the employees of Spanish companies. The Tripartite Foundation manages the training actions within companies (demand-side training). Training actions include continuing training plans and individual training leave (PIF).

Companies plan and manage demand-side training of their workers while workers must take the initiative to request leave for training. Legal representatives of workers must exercise their workers rights to training participation and information as outlined in current Spanish rules and regulations. Therefore, in regard to continuing training, government intervention is restricted to the monitoring and follow-up of continuing training.

Companies planning to provide continuing training automatically receive a credit to finance it, so it is necessary to communicate information regarding any continuing training to the Tripartite Foundation. This communication is achieved through XML files uploaded through the Tripartite Foundation's web page: www.fundaciontripartita.org. The possible files for communication are:

- Communication of beginning of groups (Company) (Inicio Grupos Formativos: XML Bonificadas).
- Communication of beginning of groups (Organizing Entity) (Inicio Grupos Formativos: XML Organizadoras).
- List of participants (Carga masiva de participantes: Datos de participantes)
- Communication of ending of group (Company) (Finalización Grupos Formativos: XML Bonificadas).
- Communication of ending of group (Organizing Entity) (Finalización Grupos Formativos: XML Organizadoras).
- Communication of training actions (Carga masiva de acciones formativas).

Delivered XML Nodes for Tripartite Foundation Reporting

Human Resources for Spain delivers XML file structures for Tripartite Foundation communication management functionality. You can also define your own XML file structures through this component by creating additional nodes and relating them to each other.

Delivered XML Templates for Tripartite Foundation Reporting

Human Resources for Spain delivers these different types of communications for Tripartite Foundation reporting. Use the “XML Template Page” (Application Fundamentals)component to define templates for the types of communication that you use for XML file generation. You can define as many XML templates as necessary to meet your company needs. Human Resources for Spain delivers the following XML templates as system data:

XML Template	***Description***
FT Begin Group Bonificatd Comp	Used to communicate the beginning of new training sessions for companies.
FT Begin Group. (Org. Entity)	Used to communicate the beginning of new training sessions for organizing entities only.
FT End Group (Org.Entity)	Used to communicate the end of a training session for organizing entities only.
FT End Group Bonificatd Compny	Used to communicate the end of a training session for companies.
FT List of participans	Used to communicate a list of course participants.
FT Training Actions.	Used to communicate the training actions.

Defining Tripartite Foundation Data

To define Tripartite Foundation data, use the FT Setup Data ESP (TRN_T_TRI_DATA_ESP) component.

These topics provide an overview of Tripartite Foundation data and discuss how to:

- Define reduction percentages.
- Define maximum bonus amounts.
- Define private contribution percentages.

Understanding Tripartite Foundation Data

The Tripartite Foundation assigns an annual budget for training that companies use to fund continuing training for their employees. This budget depends on the professional training quote deposited by the company in the previous year and the number of employees.

The PeopleSoft system delivers the following Tripartite Foundation setup data:

- Reduction percentages and average reduction per employee (new companies or new centers).

- Reduction by type of training and level (maximum bonus amounts).
- Percentages to calculate the private contribution.

Pages Used to Define Tripartite Foundation Data

Page Name	***Definition Name***	***Usage***
Reduction Percentages Page	TRN_T_DATA1_ESP	Define reduction percentages.
Maximum Bonus Amount Page	TRN_T_DATA2_ESP	Define maximum bonus amounts.
Private Contribution Page	TRN_T_DATA3_ESP	Define private contribution percentages.

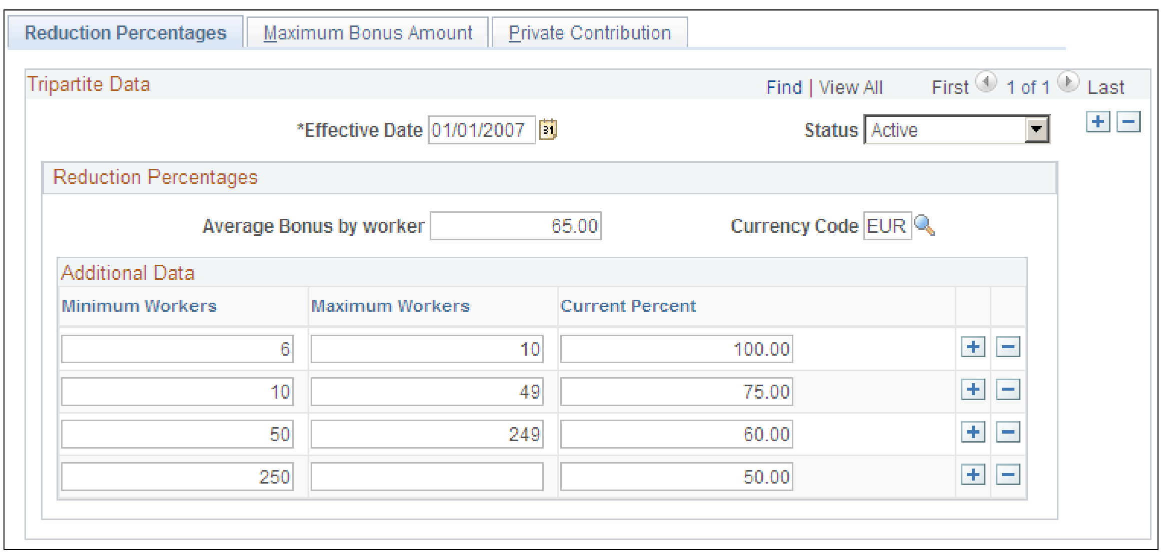
Reduction Percentages Page

Use the Reduction Percentages page (TRN_T_DATA1_ESP) to define reduction percentages.

Navigation:

Set Up HCM > **Product Related** > **Enterprise Learning** > **FT Setup Data ESP** > **Reduction Percentages**

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



Note: The PeopleSoft HR product delivers this page populated with values based on current Spanish regulations.

Field or Control	***Description***
Average Bonus by worker	Enter the amount of money the company receives per employee for the purposes of continuing training. Use this field when managing new companies or new work centers.
Minimum Workers and Maximum Workers	Use these fields to enter a range of the number of employees.
Current Percent	Enter the percentage associated with each range of number of employees. The system uses this percentage to calculate the current credit for a company based on the credit received in the previous year.

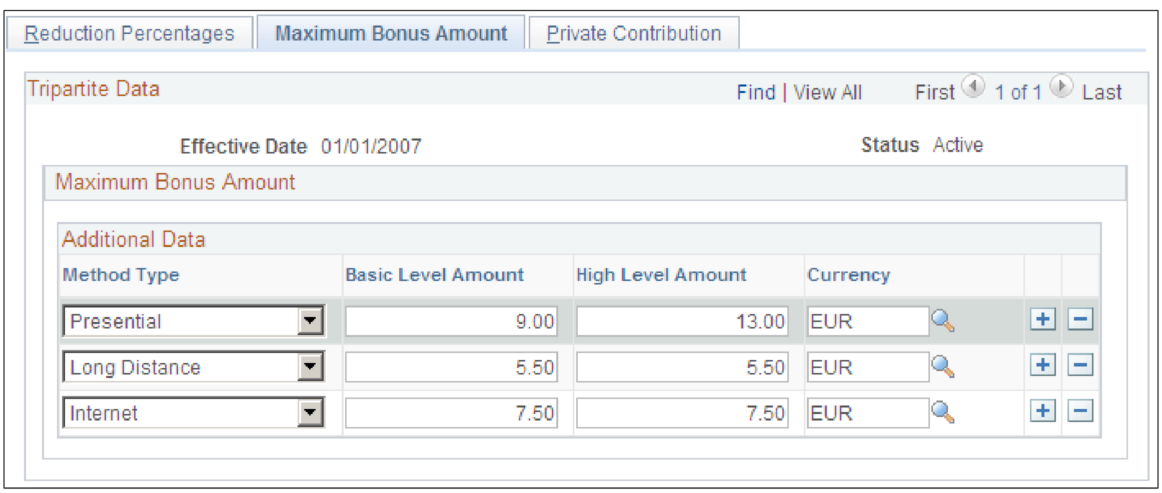
Maximum Bonus Amount Page

Use the Maximum Bonus Amount page (TRN_T_DATA2_ESP) to define maximum bonus amounts.

Navigation:

Set Up HCM > **Product Related** > **Enterprise Learning** > **FT Setup Data ESP** > **Maximum Bonus Amount**

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



Note: The PeopleSoft HR product delivers this page populated with values based on current Spanish regulations.

Use this page to enter maximum bonus amounts for each training method type.

Field or Control	*Description*
Method Type	Enter the method of training delivery. Valid values are: *Internet* (On line), *Long Distance,* **Mix,** and *Presential*.
Basic Level Amount	Enter the basic level maximum amount for the method type.
High Level Amount	Enter the high level maximum amount for the method type.

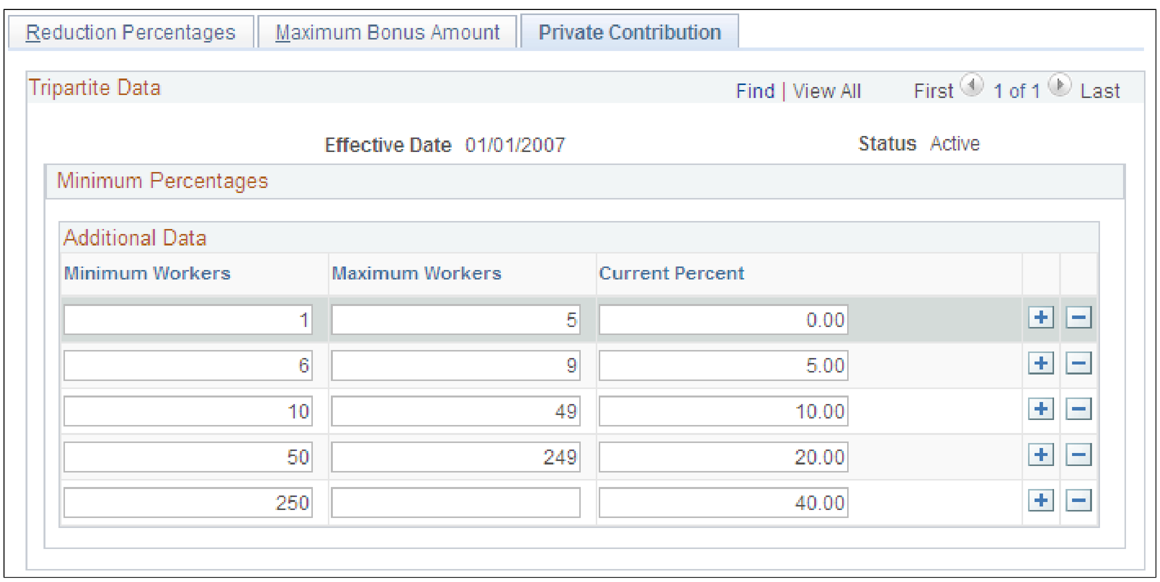
Private Contribution Page

Use the Private Contribution page (TRN_T_DATA3_ESP) to define private contribution percentages.

Navigation:

Set Up HCM > **Product Related** > **Enterprise Learning** > **FT Setup Data ESP** > **Private Contribution**

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



Note: The PeopleSoft HR product delivers this page populated with values based on current Spanish regulations.

Use this page to enter the minimum percentages used to calculate the private contribution of companies toward the training of their workers.

Field or Control	*Description*
Minimum Workers and Maximum Workers	Enter a range of the number of employees.

Field or Control	*Description*
Current Percent	Enter the percentage associated with each range of number of employees.

Defining Tripartite Foundation Course and Session Data

This topic discusses how to efine Tripartite Foundation course and session data.

These topics discuss how to:

Pages Used to Define Tripartite Foundation Course and Session Data

Page Name	*Definition Name*	*Usage*
FT Actions and Groups ESP - Training Actions Page	TRN_T_ACTN_GRP_ESP	Define training actions of Tripartite Foundation, such as training type, level, and means.
FT Actions and Groups ESP - Groups Page	TRN_T_GROUPS_ESP	Define training groups of Tripartite Foundation.
Session Data Tripartite Page	TRN_T_SES_DATA_ESP	Define session data.
Presential Page	TRN_T_PRE_MTH_ESP	Define presential training details.
Long Distance Page	TRN_T_LDIS_MTH_ESP	Define long distance training details.
Internet Page	TRN_T_INTE_MTH_ESP	Define internet training details.
Students Page	TRN_T_SES_STDN_ESP	View students enrolled in the session.
Training Costs Page	TRN_T_SES_COST_ESP	Define training costs.
Direct Costs Page	TRN_T_COSTS1_SEC	View direct costs associated with this session.
Associated Costs Page	TRN_T_COSTS2_SEC	View additional expenses associated with this session.
Personnel Costs Page	TRN_T_COSTS3_SEC	View personnel costs associated with this session.

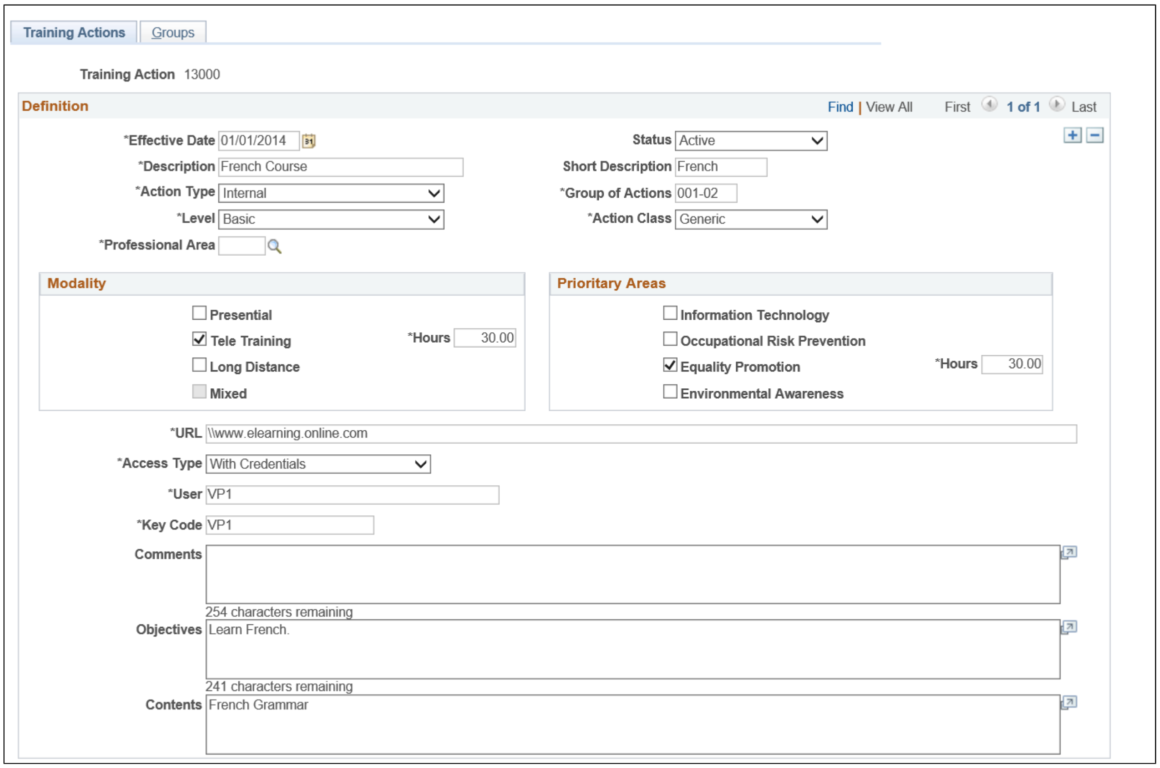
FT Actions and Groups ESP - Training Actions Page

Use the FT Actions and Groups ESP - Training Actions page (TRN_T_ACTN_GRP_ESP) to define training actions of Tripartite Foundation, such as training type, level, and means.

Navigation:

Set Up HCM > **Product Related** > **Enterprise Learning** > **FT Actions and Groups ESP** > **Training Actions**

This example illustrates the fields and controls on the FT Actions and Groups ESP - Training Actions page. You can find definitions for the fields and controls later on this page.



Use this page to create training actions.

Field or Control	***Description***
Action Type	Indicate if this training action is *Internal* or from a *Professnal Qualif Catalog* (professional qualified catalog). When you select *Professnal Qualif Catalog,* the page displays the **Competency Unit, Certificated Code,** and **RD Number** fields.
Group of Actions	Enter a group actions code. Valid codes use a 999-99 format.
Level	Indicate if the level of this training action is *Basic* or *High*. The system uses this data to calculate the maximum bonus amounts.

Field or Control	***Description***
Professional Area	Indicate the professional area.
Action Class	Indicate if the training class action is *Generic* or *Specific*.
Competency Unit, Certificated Code, and **RD Number**	Enter the corresponding codes for this professional qualified catalog action type. These fields are available when you select *Professnal Qualificatn* as the Action Type value.
Training Type and **Hours**	Identify the mode of how this training will be taught by selecting from the applicable check boxes: • **Presential** (being present at the training) • **Long Distance** • **On Line** When you select this option, the page displays the **URL** and **Access Type** fields. • Mix This check box is selected automatically when you have selected two or more modes of training (training types). When you select a check box, the corresponding **Hours** field appears next to the field. Enter the number of hours it is expected to complete the training in this mode. When you select more than one check box, the **Mix** check box is automatically selected and the **Hours** field displays the total hours from all training types combined.
Priority Areas	Select any of the following, with its corresponding hours, that apply to the training action : • **Technological Module:** • **RiskPrevention Module:** • **Equity Promotion:** • **Environment Module:** When you select a check box, the corresponding **Hours** field appears next to the field. These hours must be included in the total hours of the training.

Field or Control	***Description***
URL	Enter the URL for the online training. According to Article 30 of Order TAS/2307 July 27th, training centers should provide the telematic access to the platform used in the training activity. This field is available when you select the On Line check box in the **Training Type** group box.
Access Type	Select either *With Credentials* or *Without Credentials*. When you select the *With Credentials* value, the page displays the User and Password fields. This field is available when you select the On Line check box in the **Training Type** group box.
User and **Password**	Enter the user ID and password when credentials are required for the online training. According to Article 30 of Order TAS/2307 July 27th, the training center must provide the user and access key to allow monitoring of the training. These fields are available when you select an **Access Type** of *With Credentials*.
Comments	Enter comments about the training action, if any.
Objectives and **Contents**	Enter the objectives to be reached and information about the content of the training action. These fields are mandatory.

FT Actions and Groups ESP - Groups Page

Use the FT Actions and Groups ESP - Groups page (TRN_T_ACTN_GRP_ESP) to define groups of Tripartite Foundation.

Navigation:

Set Up HCM > **Product Related** > **Enterprise Learning** > **FT Actions and Groups ESP** > **Groups**

This example illustrates the fields and controls on the FT Actions and Groups ESP - Groups page. You can find definitions for the fields and controls later on this page.

Use this page to associate training groups with training actions. You can set up training groups for each level. Levels are defined on the Training Actions page.

Field or Control	***Description***
Training Group	Enter training group codes, up to five (5) digits long, that belong to the training action.
Means Type	Select either *Company Means* or *Org Entity Means.*
Additional Means	Select to identify that there are additional means for this training group.

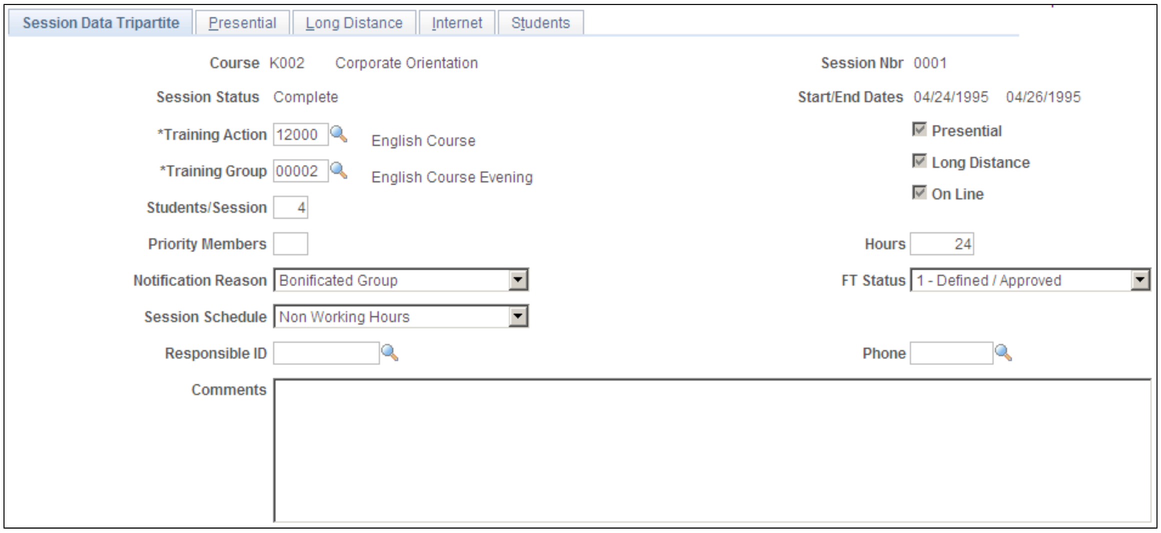
Session Data Tripartite Page

Use the Session Data Tripartite page (TRN_T_SES_DATA_ESP) to define session data.

Navigation:

Administer Training > **Define Course/Cost Details** > **FT Session Data ESP** > **Session Data Tripartite**

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



Field or Control	***Description***
Training Action and **Training Group**	Select a training action and group to associate with the course session.
Students/Session	Indicates the number of students participating in the session. This number is provided by default from the number of students enrolled in the course, but you can modify this entry, if necessary.
Presential, Long Distance, and **On Line**	Displays the modes of training associated with the training action on the FT Actions and Groups ESP - Training Actions Page. The corresponding page tabs will display for only those items that are selected here.
Priority Members	Indicates the number of high priority members attending the session. This number is provided by default from the enrolled students who have the **High Priority Member** check box selected on the FT Employee Data ESP Page. You can modify this number entry, if necessary.
Hours	Enter the total training hours for this session. The system displays the total number of hours from the FT Actions and Groups ESP - Training Actions Page (the sum of the hours for every modality), but you can modify the hours here, if necessary. These hours should match the combination of hours from all modes of training entered on the Presential, Long Distance, and Internet pages.

Field or Control	Description
Notification Reason	Select from the valid values *Bonificated Group* (when the financing of the training is done with Social Security Reductions) or *Private Contribution* (when the company contributes to the financing of the training). **Note:** Only companies with reductions will have access to the following pages in the Tripartite Foundation application: Credit, Private Contribution, High Priority Collectives. Every company (with reduction) must have a private contribution.
FT Status	Indicate the status of the session. Statuses include: • *1- Defined/Approved* • *2- Initiated No Reported* • *3- Initiated and Reported* • *4- Finished No Reported* • *5- Finished and Reported* When a course session has been identified as *Complete* on the Course Session Profile Page page, select the values *4- Finished No Reported* or *5- Finished and Reported*. When you select either of these values, the Training Costs page becomes available within this component. This information is part of the communications with tripartite foundation, via XML reporting.
Session Schedule	Identify when the session will be held. Select either *In Working Hours* and *Non Working Hours*. Identify when the session will be held. Select either: • *Non Working Hours* • *In Working Hours* - This option displays the *Percentage* field.
Percentage	Enter the part of the schedule in which the employee is receiving the training. This value will be used to calculate the personnel costs. This field is available when you select *In Working Hours* in the **Session Schedule** field.
Responsible ID and **Phone**	Enter the ID of the primary point of contact for the session.

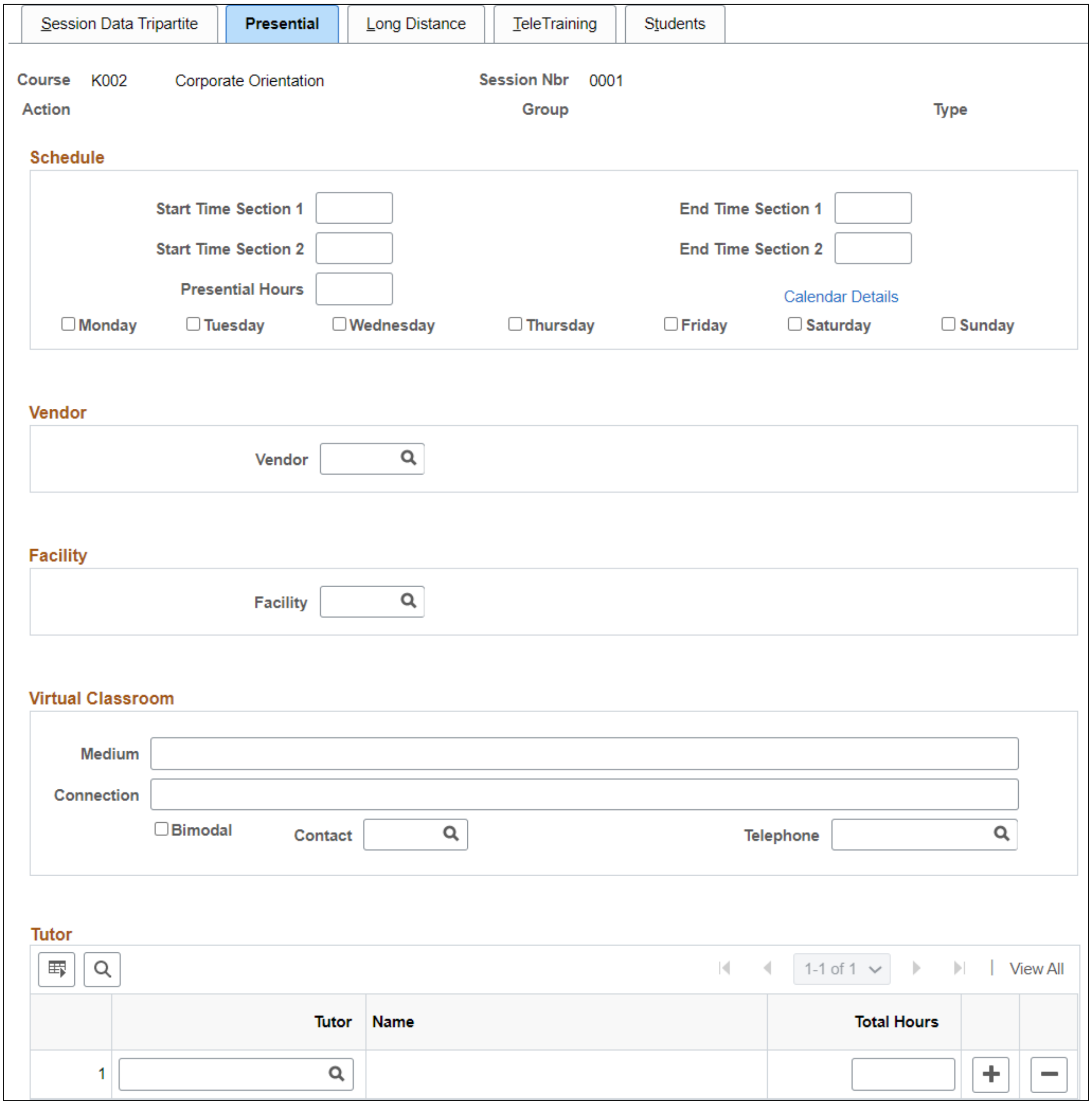
Presential Page

Use the Presential page (TRN_T_PRE_MTH_ESP) to define presential training details.

Navigation:

Administer Training > Define Course/Cost Details > FT Session Data ESP > Presential

This example illustrates the fields and controls on the Presential page.



Schedule

Field or Control	***Description***
Start Time Morning, End Time Morning, Start Time Evening, and **End Time Evening**	Enter the start and end times for the morning and evening portions of the training course session. These times are provided by default from the Course Session Profile Page. You can overwrite these values as needed.

Field or Control	Description
Training Hours	Enter the total number of hours for the training session for this mode of training.

This value is provided by default from the Training Actions set up page, but you can overwrite this value as necessary.

Select a check box next to the days of the week on which the training will be offered.

Vendor

Enter the ID of the vendor of the training session.

Facility

Enter the ID of the facility in which the training will occur.

Virtual Classroom

Field or Control	Description
Medium	To identify the medium used for the virtual session,
Connection	Enter the information about the connection used to conduct the Virtual Classroom.
Contact	Select the ID of the person who is the contact of the Virtual Classroom. The list of values include all the people setup as Instructors.
Telephone	Select one of the valid telephone numbers assigned to the person of contact.
Bimodal	Select the checkbox if you want the virtual classroom to be done online for part of the students and presential for the rest of the students.

Tutor

Field or Control	Description
Tutor	Select the tutor.

Field or Control	***Description***
Name	Displays the name of the tutor.
Total Hours	Enter the total number of hours for which the class to be taken.

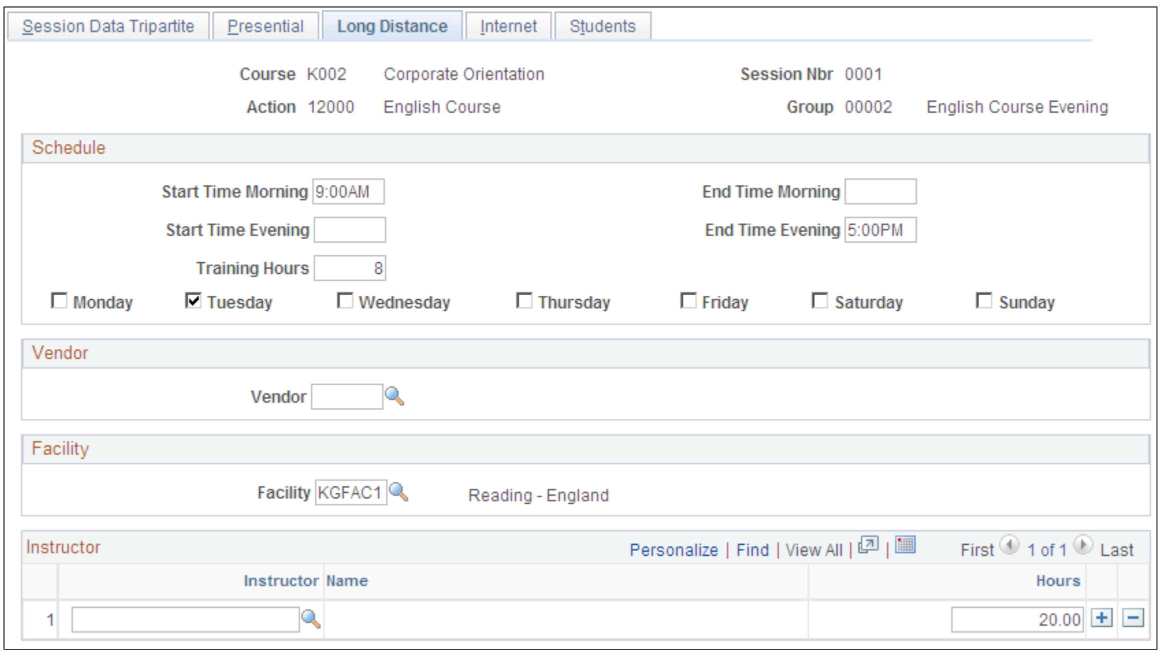
Long Distance Page

Use the Long Distance page (TRN_T_LDIS_MTH_ESP) to define long distance training details.

Navigation:

Administer Training > **Define Course/Cost Details** > **FT Session Data ESP** > **Long Distance**

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



Note: All other fields on this page are identical to those on the Presential Page..

Instructor

Enter the IDs of the instructors associated with the long distance session along with the number of hours for which they are scheduled.

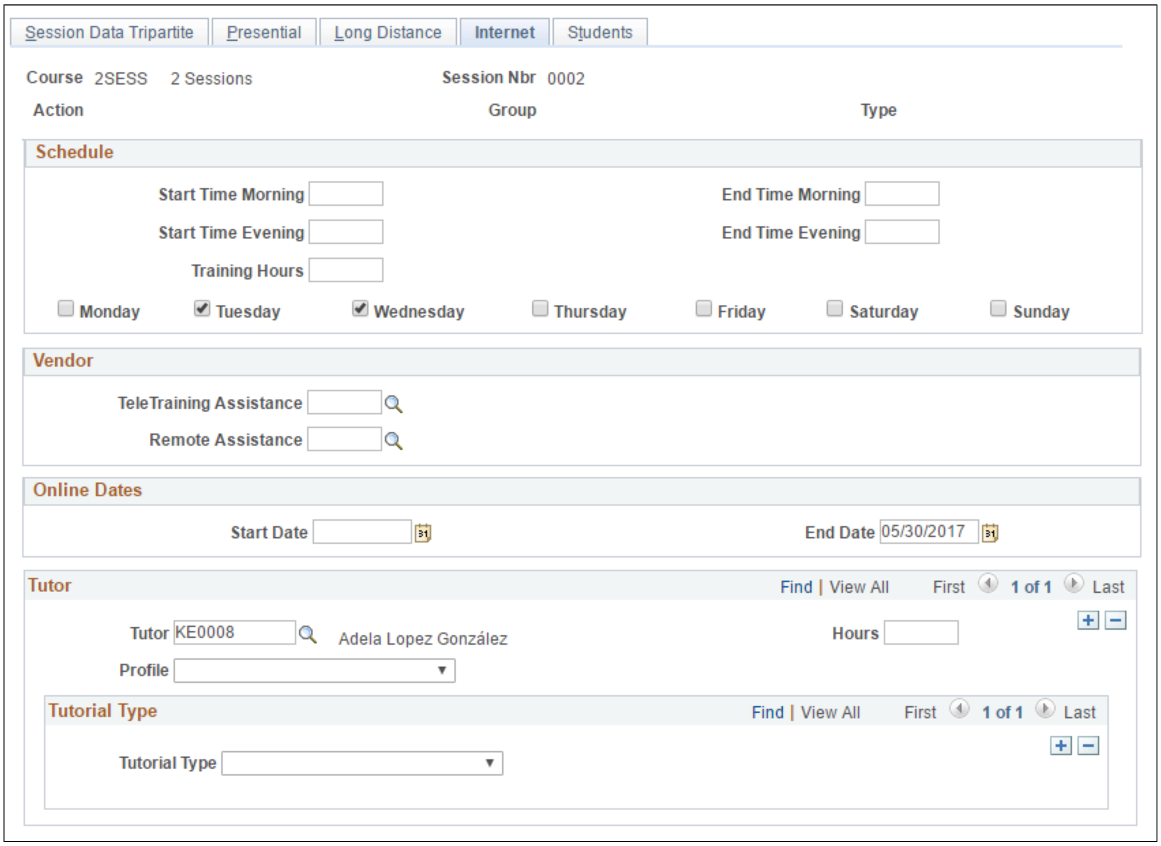
Internet Page

Use the Internet page (TRN_T_INTE_MTH_ESP) to define internet training details.

Navigation:

Administer Training > **Define Course/Cost Details** > **FT Session Data ESP** > **Internet**

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



Note: All other fields on this page are identical to those found on the Long Distance pages.

Vendor

Field or Control	***Description***
eLearning Assistance	Enter the ID of the vendor of the training session for e-Learning assistance.
Remote Assistance	Enter the ID of the vendor of the training session for remote assistance.

Online Dates

Enter the start and end dates for the online training.

Tutor

Select the **Profile** and **Tutorial Type** for the online training.

Field or Control	*Description*
Profile	Identify the role played by the tutor. Possible values are: • Trainer • Team Builder • Both
Tutorial Type	Enter the type of tutorial that will be performed by the tutor in this training. Possible values are: • Email • Video Conference • Forum • Other In the case of value ‘Other’, system will required additional information. The system allows entering more than one tutorial type for the same tutor. **Description**: Fill this field if you have selected the Other option.

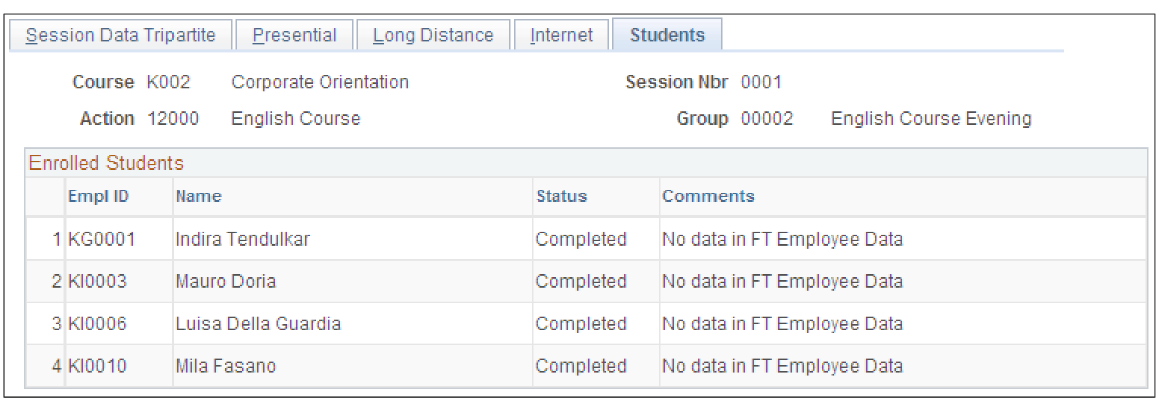
Students Page

Use the Students page (TRN_T_SES_STDN_ESP) to view students enrolled in the session.

Navigation:

Administer Training > **Define Course/Cost Details** > **FT Session Data ESP** > **Students**

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



This page displays those students enrolled in this course session and their status. This enables you to know at any time the status and characteristics of each participant. The system identifies in the Comments field if a student is a *High Priority Member* or *No data in FT Employee Data,* if data is missing for the student. The Tripartite Foundation requires a file from with all the participants.

Training Costs Page

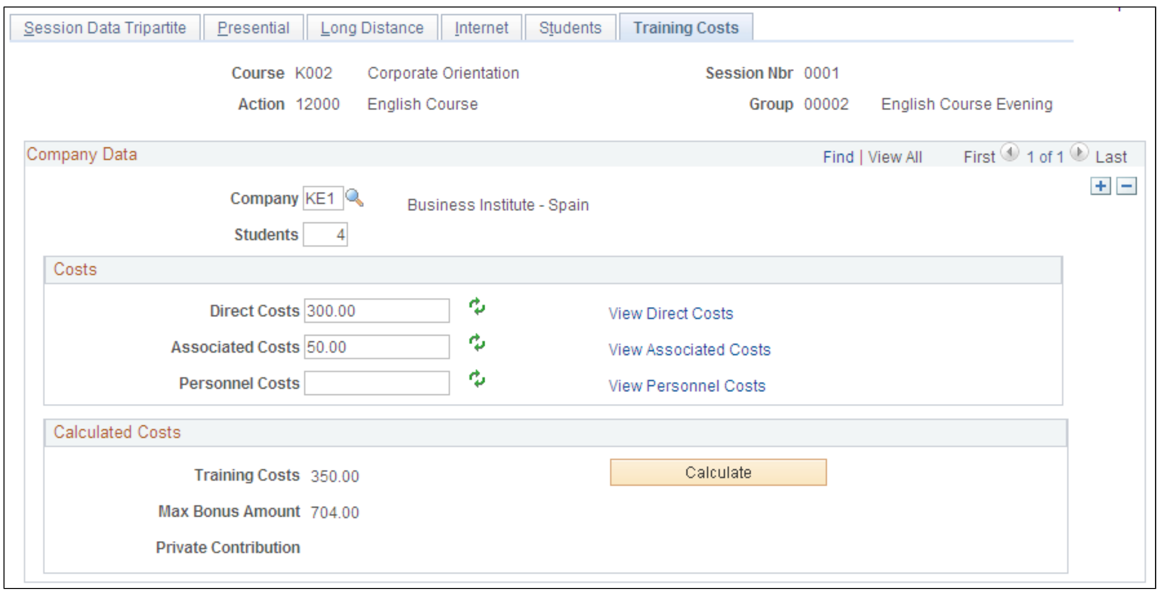
Use the Training Costs page (TRN_T_SES_COST_ESP) to define training costs.

Navigation:

Administer Training > **Define Course/Cost Details** > **FT Session Data ESP** > **Training Costs**

Note: This page is available in the component only if you select one of the *Finished* values in the FT Status field on the Session Data Tripartite page.

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



This page is available for entry if you selected *4- Finished No Reported* in the FT Status field on the Session Data Tripartite page. If you selected *5- Finished and Reported*, the page is display only.

Company Data

Field or Control	***Description***
Company	Enter the company incurring the training cost. If you select the *Company Means* value on the FT Actions and Groups ESP - Groups page for the training group, the Training Costs page allows you to enter information for only one company. If you select the *Org Entity Means* value on the FT Actions and Groups ESP - Groups page, the Training Costs page allows you to enter information for multiple companies.
Students	Enter or view the number of students who attended the training. This value comes from the **Student/Session** field on the Session Data Tripartite page when the training group is identified as *Company Means*.

Costs

Field or Control	***Description***
Direct Costs, Associated Costs, and **Personnel Costs**	View or enter the direct costs, associated costs, and personnel costs incurred by the company for the training. The system will calculate the direct costs and associated costs based on the data entered in the Course Session Costs pages, whereas Personnel Costs are based on the data entered in Trainees Salary Costs pages. You can view details of these costs by selecting the corresponding links. To use the system generated cost after overwriting a value, select the Refresh icon button next to the field. You must have a value in all three fields to make the **Calculate** button available.
View Direct Costs, View Associated Costs, and **View Personnel Costs**	Select the appropriate link to access the Direct Costs page, Associated Costs page, or Personnel Costs page to view the different costs associated with the session, such as the vendor or facility costs.

Calculate Costs

Field or Control	***Description***
Calculate	Click to calculate the training costs and private contributions. This button becomes available only after you enter values in all of the fields in the Costs group box. After you click the **Calculate** button, this group box displays the various costs associated with the training.

Direct Costs Page

Use the Direct Costs page (TRN_T_COSTS1_SEC) to view direct costs associated with this session.

Navigation:

Select the **View Direct Costs** link on the Training Costs page.

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

Use this page to view the breakdown of the direct costs for the training session, such as vendor, instructor, equipment, facility, materials, assurance, transport, and other costs. The system calculates the direct costs based on the data entered on the Course Session Costs pages. Direct costs are the expenses defined as *Direct* on Tuition Expense Type page.

Note that the system allows for multi-currency calculations.

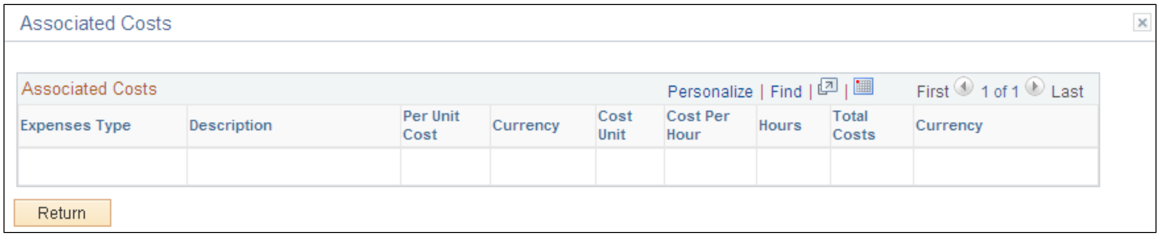
Associated Costs Page

Use the Associated Costs page (TRN_T_COSTS2_SEC) to view direct costs associated with this session.

Navigation:

Select the **View Associated Costs** link on the Training Costs page.

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



Use this page to view the breakdown of the associated, or indirect, costs for this training session, such as water, lights, telephone, or other costs. The system calculates the associated costs based on the data entered on the Course Session Costs pages. Associated costs are the expenses defined as *Indirect* on the Tuition Expense Type page.

Note that the system allows for multi-currency calculations.

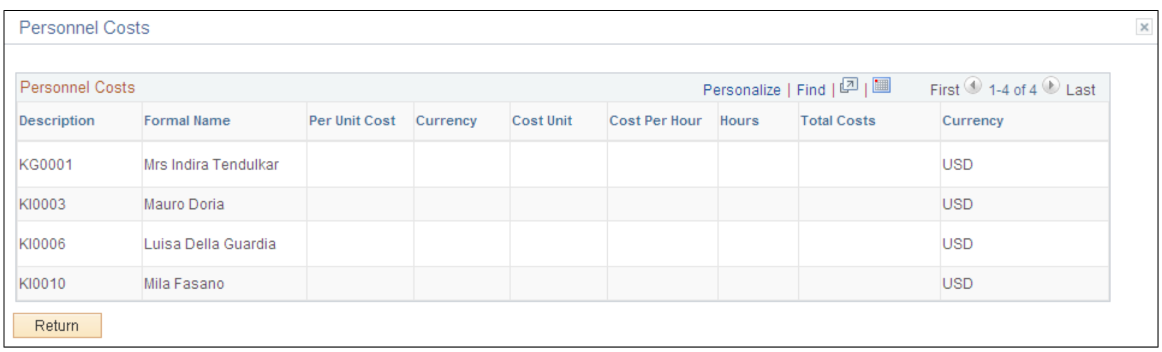
Personnel Costs Page

Use the Personnel Costs page (TRN_T_COSTS3_SEC) to view direct costs associated with this session.

Navigation:

Select the **View Personnel Costs** link on the Training Costs page.

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



Use this page to view the breakdown of personnel costs for this training session. For example, the salary costs of the employees who receive training during their working day. The system allows for multi-currency calculations. The system calculates the personnel costs based on the data entered on the Trainees Salary Costs pages. The system uses the **Percentage** field value, entered on the Session Data Tripartite page when the session schedule is defined as *In Working Hours*, to determine the cost.

Calculating Tripartite Foundation Training Credit

To calculate training credit, use the FT Training Plans & Credit ESP (TRN_T_SIMU_CRD_ESP) component.

This topic discusses how to calculate training credit for companies.

Page Used to Calculate Tripartite Foundation Training Credit

Page Name	*Definition Name*	*Navigation*	*Usage*
Training Plan	TRN_T_ACT_PLAN_ESP	**Administer Training** > **Define Course/Cost Details** > **FT Training Plans & Credit ESP** > **Training Plan**	Plan the annual training plan for the company.
Credit Calculation	TRN_T_SIMU_CRD_ESP	**Administer Training** > **Define Course/Cost Details** > **FT Training Plans & Credit ESP** > **Credit Calculation**	Calculate training credits for companies for the current training year.
Credit Management	TRN_T_CREDT_ESP	**Administer Training** > **Define Course/Cost Details** > **FT Training Plans & Credit ESP** > **Credit Management**	Manage the annual training credit for the company.
Bonus Distribution	TRN_T_REDCTN_SEC	Select the **Bonus Distribution** link on the Credit Management page.	Distribute the cost to reduce, by months, to be reported to Tripartite Foundation (using the XML End of Groups files) and to Social Security (using the FAN File).

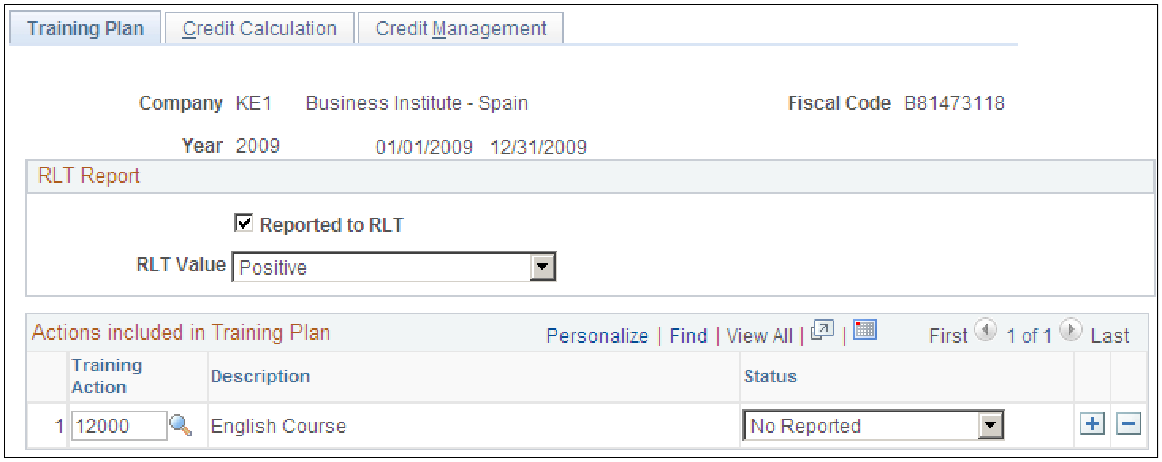
Training Plan Page

Use the Training Plan page (TRN_T_ACT_PLAN_ESP) to plan your annual training plans.

Navigation:

Administer Training > **Define Course/Cost Details** > **FT Training Plans & Credit ESP** > **Training Plan**

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



Use this page to record information for communicating training actions.

Field or Control	Description
Company	Displays the company for which you are calculating training credit.
Fiscal Code	Displays the fiscal code associated with the company.
Year	Displays the year for which you are calculating training credit.

RLT Report

The RLT requires 15 days to issue a report.

Field or Control	Description
Reported to RLT	Select this check if the training plan has been reported to workers' representatives [Worker Legal Representation (RLT)].
RLT Value, Discrepancy Date, and **Discrepancy Solved in 15 Days**	Select the reply from workers' representatives (RLT). Valid values are *Positive, Discrepancy,* and *No Answer.* When *Discrepancy* is selected, the **Discrepancy Data** and **Discrepancy Solved in 15 Days** fields become available.

Actions included in Training Plan

Field or Control	Description
Training Action	Enter all training actions to be included in the annual training plan for the company.
Status	Identify the reporting status of the training action. Values are *No Reported* or *Reported.*

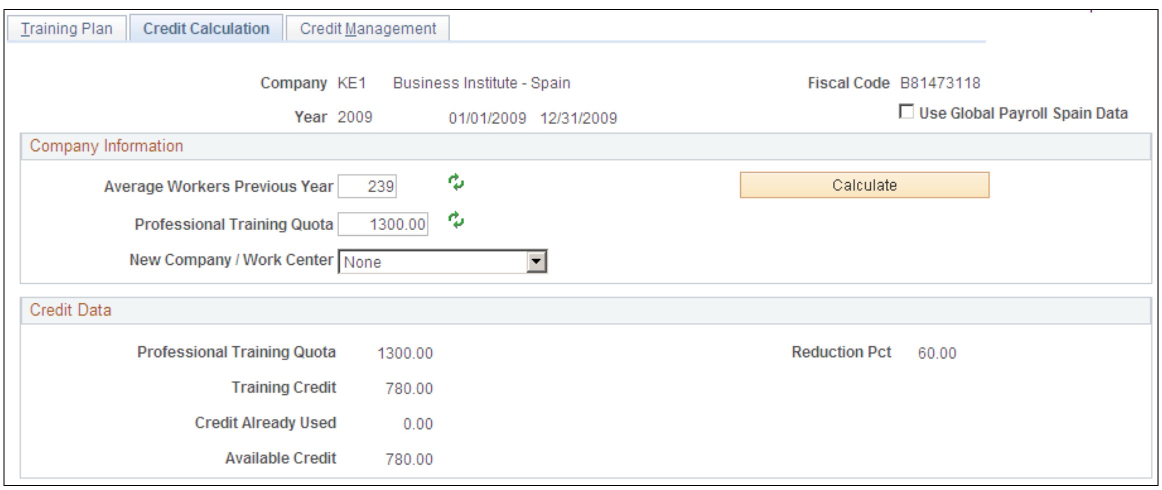
Credit Calculation Page

Use the Credit Calculation page (TRN_T_SIMU_CRD_ESP) to calculate training credit for companies.

Navigation:

Administer Training > **Define Course/Cost Details** > **FT Training Plans & Credit ESP** > **Credit Calculation**

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



Field or Control	Description
Use Global Payroll Plain Spain Data	Select this check box to have the system retrieve the average worker's previous year and professional training quota data from GP Spain records to calculate the training credit. This check box is available for selection only if you have installed Global Payroll for Spain.

Company Information

Field or Control	***Description***
Average Workers Previous Year	Select the Refresh icon button after this field to have the system enter the average number of workers employed by the company during the year. You can overwrite this value as necessary.
Professional Training Quota	Enter you company's professional training quota.
New Company / Work Center	Select from the valid values *New Company*, *New Work Center*, or *None*. Select the *New Company* value to calculate the training credit for a new company. When you select this value, the Hired Workers Current Year field becomes available and is required for calculation. Select the *New Work Center* value to indicate that the company created one or more new work centers during the calendar year for which you are calculating training credit. When you select this value, the Hired Workers Current Year field becomes available and is required for calculation.
Hire Workers Current Year	This field displays when you select *New Company* or *New Work Center* in the **New Company / Work Center** field. Enter the number of workers hired by the company during the year that should be considered in the training credit calculation.
Calculate	Click to calculate the training credit that the company should receive for the year. The system automatically calculates the training credit when you enter values in the **Average Workers Previous Year** and **Professional Training Fee** fields. If you select a value in the **New Company / Work Center** field and enter a value in the **Hired Workers Current Year** field, you will have to click the Calculate button again to recalculate the credit. This button is available when you select *None* in the **New Company / Work Center** field or after you have entered a value in the **Hire Workers Current Year** field for a *New Company* or *New Work Center*.

Credit Data

Field or Control	***Description***
Professional Training Quote	Indicates the professional training quote deposited by the company in the previous year.
Reduction Pct	Indicates the reduction percentage applied to the professional training quote. The system derives this percentage based on the number you enter in the **Average Workers Previous Year** field.
Training Credit	Indicates the total credit to finance training actions.
Credit Already Used	Indicates any credit already used by the company for the year. This field is unavailable for editing if you have PeopleSoft Global Payroll for Spain installed.
Available Credit	Displays the credits that are available for the company for the year.

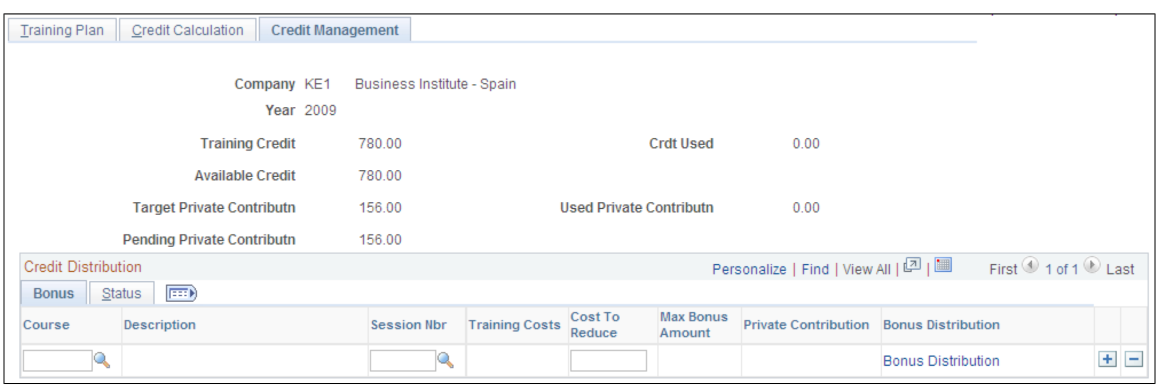
Credit Management Page

Use the Credit Management page (TRN_T_CREDT_ESP) to manage you training credits.

Navigation:

Administer Training > **Define Course/Cost Details** > **FT Training Plans & Credit ESP** > **Credit Management**

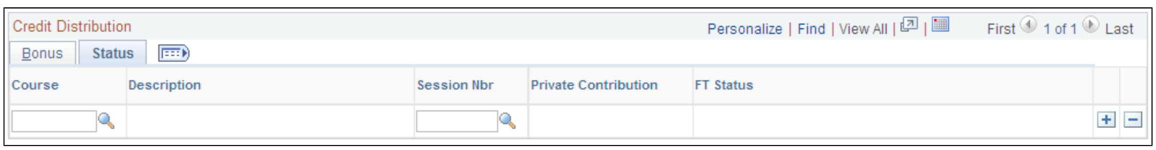
This example illustrates the fields and controls on the Credit Management page: Bonus tab. You can find definitions for the fields and controls later on this page.



Use this page to view the used credit, credit available as well as the pending private contribution at any time. It is recalculated whenever you add a new training session.

Field or Control	*Description*
Course and **Session Nbr**	Enter the course-sessions (training groups) that are completed or finished. The system will display the costs calculated on the FT Session Data page.
Cost To Reduce	Displays the maximum bonus amount the system provides by default. You can modify this information; however the value cannot exceed either the **Max Bonus Amount** or the **Available Credit** values.
Bonus Distribution	Select this link to access the Bonus Distribution page and enter the distribution of the bonus by month.

This example illustrates the fields and controls on the Credit Management page: Status tab. You can find definitions for the fields and controls later on this page.



Use the Status tab to view the FT status for the selected course-sessions (training groups) you entered on the previous tab. Values may include *4 - Finished No Reported* or *5 - Finished and Reported*.

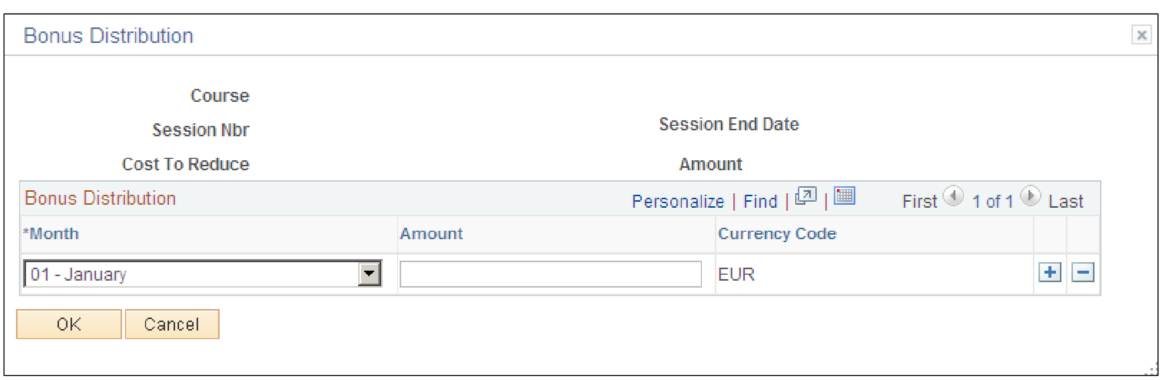
Bonus Distribution Page

Use the Bonus Distribution page to (TRN_T_REDCTN_SEC) to enter the distribution of the bonus.

Navigation:

Select the **Bonus Distribution** link on the Credit Management page.

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



The system enables you to distribute the bonus in the desired months using the **Month** and **Amount** fields.

Enter the month or months in which to apply the cost to reduce. Companies that provide continuous training to their workers can reduce their Social Security monthly contributions through the FAN file (the reduction amount will appear on line EDTCA80 in the file).

This bonus distribution is also reported to Tripartite Foundation (using the XML End of Groups files).

Related Links

"Create FAN File ESP Page" (PeopleSoft Global Payroll for Spain)

Setting Up Employees for Tripartite Foundation Reporting

To set up employees for Tripartite Foundation reporting, use the FT Employee Data ESP (TRN_T_EMP_DATA_ESP) and Enroll Individually (COURSE_ENROLLMENT1) components.

These topics discusses how to:

- Define Tripartite Foundation employee data.
- Enroll employees in training sessions.

Pages Used to Define Tripartite Foundation Employee Data

Page Name	***Definition Name***	***Usage***
FT Employee Data ESP Page	TRN_T_EMPL_DAT_ESP	Define employee data.
Enroll Individually Page	COURSE_ENROLLMENT	Enroll employees in training sessions.

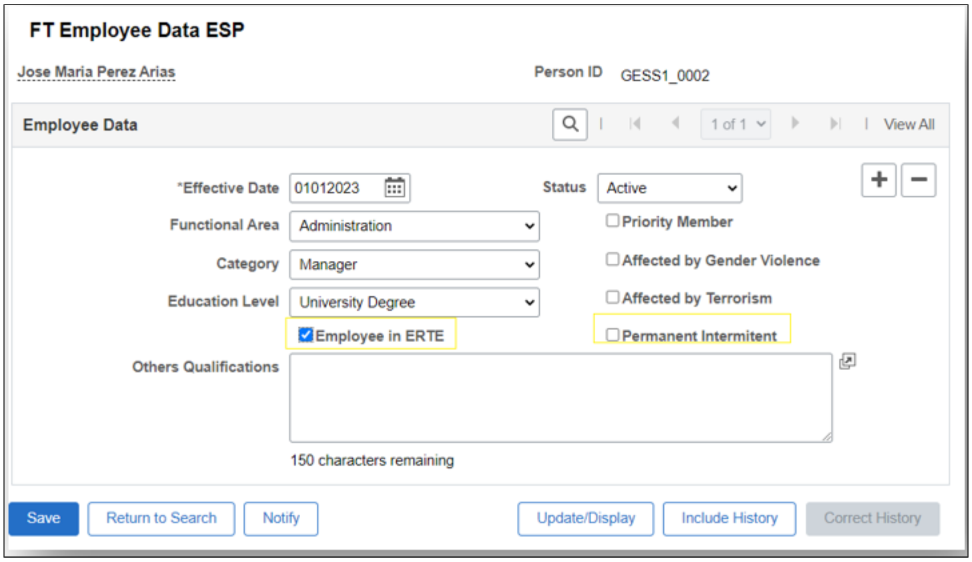
FT Employee Data ESP Page

Use the FT Employee Data ESP page (TRN_T_EMPL_DAT_ESP) to define employee data.

Navigation:

Administer Training > **Define Course/Cost Details** > **FT Employee Data ESP** > **FT Employee Data ESP**

This example illustrates the fields and controls on the FT Employee Data ESP page.



Field or Control	***Description***
Functional Area	Select the employee's functional area. Valid values are: • *Administration* • *Commercial* • *Maintenance* • *Management* • *Production*
Category	Select an employment category. Valid values are: • *Manager* • *Middle Level Manager* • *No Qualified Worker* • *Qualified Worker* • *Technical*

Field or Control	*Description*
Education Level	Select the employee's education level. Valid values are: • *FPI, FPII or Equivalent* • *Major Eng or Bachelor's degree* (major engineering or bachelor's degree) • *Others* • *Primary Studies, EGB or eqival* (primary studies, educación general básica, or equivalent) • *Tech Archicht/Enginr, Tech Schl* (technical architect/engineer, technical scholar) • *Without Studies*
High Priority Member	Select to indicate that the employee is a priority member.
Employee in ERTE	Select this checkbox if the employee is included in an ERTE. (“Expediente de Regulación de Empleo”)
Permanent Intermittent	This check box is automatically updated if the employee's contract type is Permanent Intermittent.
Others Qualifications	Enter any additional qualifications for the employee.

Generating Tripartite Foundation XML Files

These topics discuss how to print Tripartite XML files.

Page Used to Generate Tripartite Foundation XML Files

Page Name	*Definition Name*	*Usage*
FT Print XML File ESP Page	TRN_T_RC_ESP	Print Tripartite XML files.

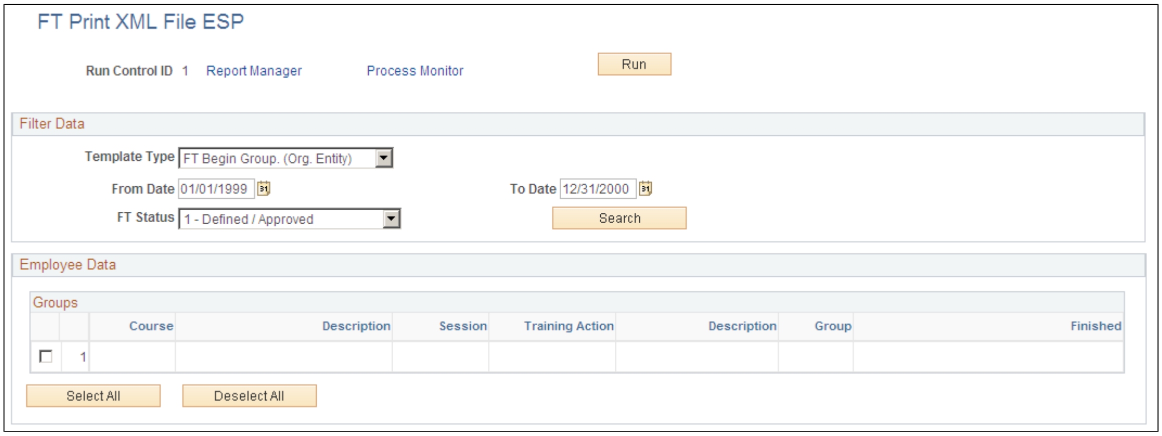
FT Print XML File ESP Page

Use the FT Print XML File ESP page (TRN_T_RC_ESP) to print tripartite XML files.

Navigation:

Administer Training > **Training Reports** > **FT Print XML File ESP** > **FT Print XML File ESP**

This example illustrates the fields and controls on the FT Print XML File ESP page. You can find definitions for the fields and controls later on this page.



Filter Data

Field or Control	***Description***
Template Type	Select a template type for the XML file ID. Valid values are: *FR Begin Group Bonificatd Comp, FT Begin Group. (Org. Entity), FT End Groups (Org.Entity), FT End Groups Bonificatd Compny, List of participans,* and *FT Training Actions.*
From Date and **To Date**	Enter a date range and click the **Search** button. For that date range, the training sessions you defined using the FT Session Data ESP component appear in the Groups group box.
FT Status	

Groups

Select the check box next to the training sessions you want to add to the XML file ID.

Chapter 12

(FRA) Integrating with Applications

Understanding Integration with Applications

These topics discuss:

- Statutory requirements of the May 4 training law.
- Tracking and processing training data using Administer Training and Global Payroll.
- Tracking and processing training data using Administer Training, Learning Management and Global Payroll.

Note: Administer Training and Learning Management are integrated whether or not the customer uses Global Payroll

Statutory Requirements of the May 4 Training Law

Starting in the year 2004, the May 4 law requires enhancements to training administration in the following areas:

Area of Statutory Enhancement	*Description*
Training Categorization	All courses must be associated with one of the following categories: • Skills Development. • Adaptation to Job Changes. • Job Changes.
Professionalization Contract	This contract affects salary calculations and the calculation of exemptions from social contributions.
DIF (Droit Individuel à la Formation [Individual Training Rights])	This entitlement specifies the number of hours that employees receive for training according to their seniority, contract type, and working hours.

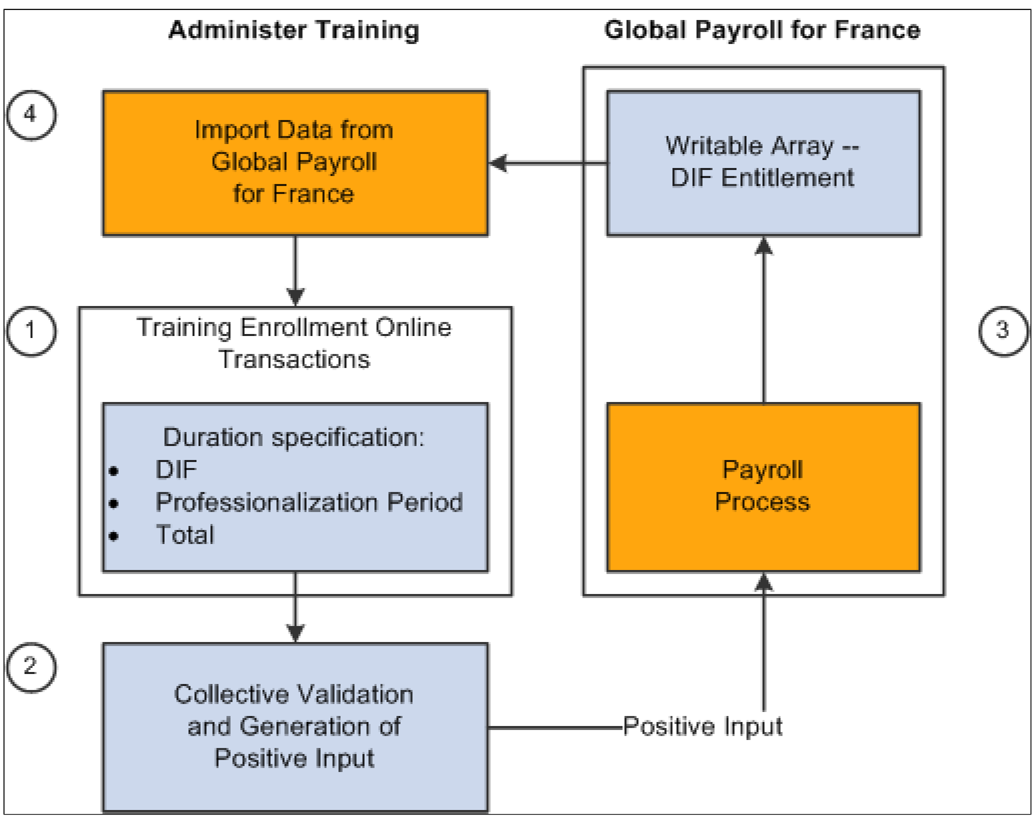
Tracking and Processing Training Data Using Administer Training and Global Payroll

To track and process training data:

1. Use the Demand from Budget Training and Training Hours Details pages to:
    a. Indicate when enrollment in a course occurs as part of a professionalization contract.
    b. Indicate when enrollment in a course occurs for the purpose of skills development.
    c. Record DIF and non-DIF hours.
2. Validate DIF and skills development training hours and transfer these hours to the payroll system using the FRA Training Validation (GP) and FRA Training Admin Validation components.
3. Process payroll and calculate DIF and skills development entitlements (earnings) in Global Payroll for France based on the training hours validated in step 2.
4. Import DIF balance data from Global Payroll for France into Administer Training using the writable array FOR WA DIF HR.

    Training administrators and others can then view this data on the enrollment pages in Administer Training to determine whether there are enough hours in a student's DIF balance to permit additional DIF allocations.

These four steps can be represented as shown in this diagram:



Tracking and Processing Training Data Using Administer Training, Learning Management and Global Payroll

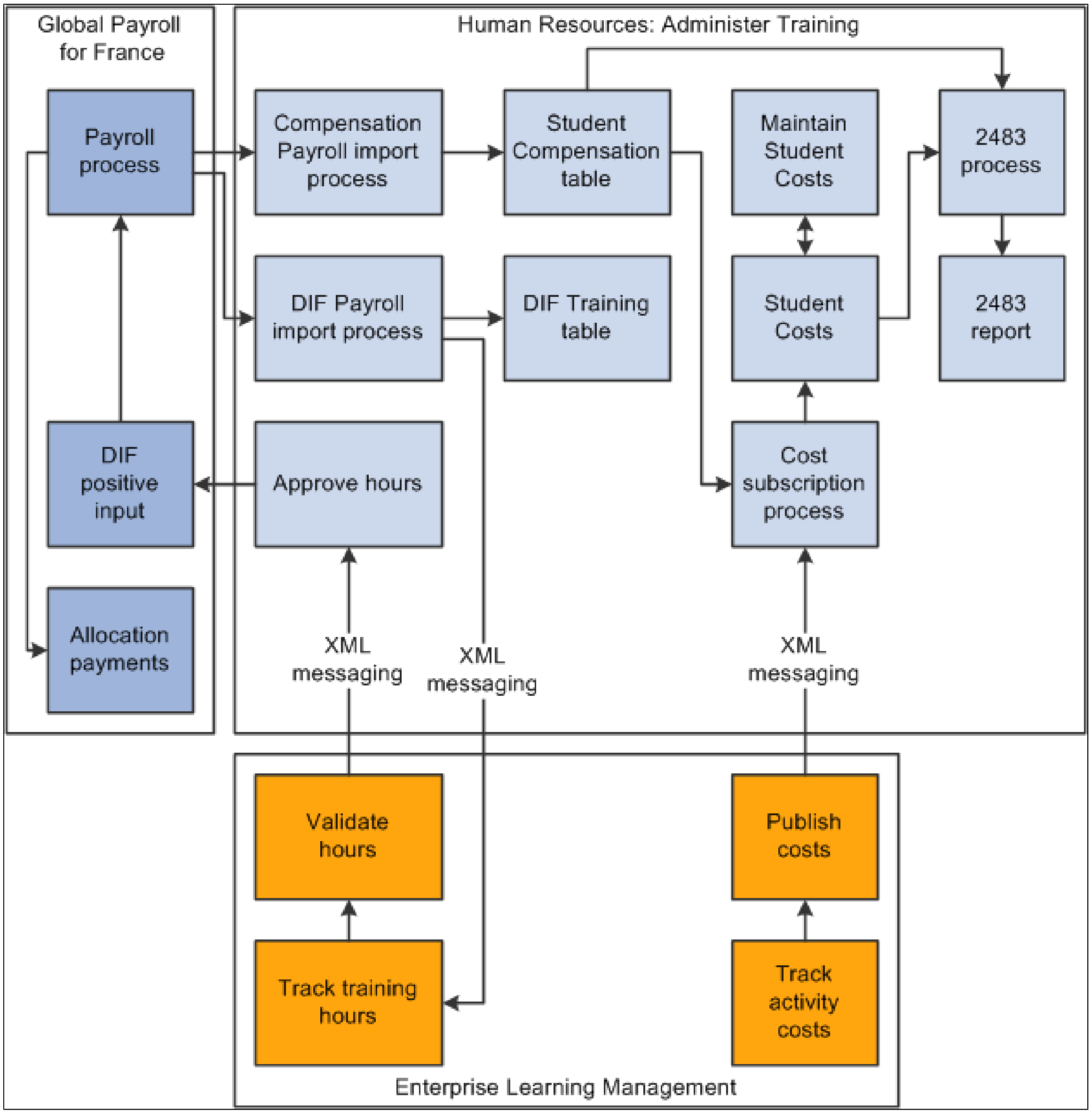
Learning Management integrates directly with the Administer Training business process in Human Resources 8.9 and above and indirectly with Global Payroll for France 8.9 and above, enabling you to produce the 2483 report, track DIF balances, and compensate learners for DIF training hours and training hours done outside the normal work schedule. The three applications interact as follows:

- Learning Management is the application that you use to set up the learning catalog, instructors, vendors, and so on. You also use this application to track learning costs and to manage enrollment and other day-to-day tasks.
- The Administer Training business process compiles information provided by Learning Management and payroll and generates the 2483 report.
- Global Payroll for France computes learner and instructor salaries for the 2483 report and calculates learners' DIF entitlement balances.

  It also calculates the salary for training hours done outside of normally scheduled work hours.

Important! When you use Learning Management to set up and track learning, do not use the Administer Training business process for those tasks. Use the Administer Training business process to configure and generate the 2483 report only. A permission list designed for Learning Management users provides access to the Administer Training pages that are needed to set up and generate the 2483 report. In this case, the Learning Management check box must be selected in the Products page of the Installation Table.

The following diagram shows the relationships between the three applications and their integrated business processes. Learning Management sends hours and cost data to Administer Training, which in turn sends approved hours data to Global Payroll. Administer Training uses payroll information from Global Payroll along with the hours and cost information from Learning Management to produce the 2483 report and track DIF balances:



Integration Points

Learning Management uses integration points to publish information to HR and to subscribe to information provided by that application. Following is a list of the full sync and incremental sync integration points that are used to track learning costs and hours.

Note: The full sync messages can generate a high volume of data. Use these messages only if you need to resynchronize HR data and Learning data during the integration process.

Message Name	***Message Handler/ Application Class***	***Records Populated in Learning Management***	***Explanation***
TRAINING_HOUR_SYNC (incremental sync) TRAINING_HOUR_ FULLSYNC (full sync)	Not applicable	Not applicable.	Outbound message that publishes validated training hours and DIF information to HR. The incremental sync message is triggered by the LM_STD _HOUR Application Engine process that is launched through the Export Learning Hours page under the Set Up ELM, Planning menu structure. The full sync message is triggered from an option on the same page.
TRN_HOUR_ACK_SYNC (incremental sync) TRN_HOUR_ACK_ FULLSYNC (full sync)	DEFAULT	LM_STG_TRKHOUR (staging table) LM_ENR_LC_TBL	Incoming message from HR. The message retrieves an acknowledgement of action taken in HR and updates the Hour Tracking Status field on the Training Hour Validation page.
DIF_BALANCE_SYNC (incremental sync) DIF_BALANCE_ FULLSYNC (full sync)	DEFAULT	LM_STG_DIFHIST (staging table) LM_DIFHIST_TBL	Incoming message that subscribes to the DIF balance information computed by the payroll engine. DIF balances appear on the enrollment pages.

Message Name	***Message Handler/ Application Class***	***Records Populated in Learning Management***	***Explanation***
STUDENT_COST_ FULLSYNC (incremental sync) STUDENT_COST_SYNC (full sync)	Not applicable.	Not applicable.	Outbound message that publishes cost data to HR for inclusion in the 2483 report. Message is based on the LM_ ENRLMT_COST table. The incremental sync message is triggered by the LM_STD _COST Application Engine process that is launched through the Export Learning Cost page under the Set Up ELM, Planning menu structure. The full sync message is triggered from an option on the same page.
COST_ACK_SYNC (incremental sync) COST_ACK_FULLSYNC (full sync)	DEFAULT	LM_STG_TRKCOST (staging table) LM_ENR_LC_TBL	Incoming message that subscribes to the cost acknowledgement sent by HR. This message includes a status field that informs the administrator about the action done by the HR administrator.

Setting Up Learning Management Integration

The following setup steps are required to configure Administer Training to integrate with Learning Management:

1. Activate the integration points.
2. Assign a new French permission list.

Receiving Data from Learning Management

Upon receiving data from Learning Management, the administrator takes the following steps:

1. Prepare the 2483 Report.
   a. Import data from Learning Management.
   b. Run the 2483 report.

2. Transfer DIF hours, training hours done outside the working schedule, and skills development data to the payroll system using the FRA Training Validation (GP) component.

Validating Training Hours

These topics discuss how to validate training hours.

Pages Used to Validate Training Hours

Page Name	***Definition Name***	***Usage***
FRA Training Admin Validation Page	TRN_COL_VALIDATION	Validate training hours (training administrator view).
FRA Training Validation (GP) Page	TRN_COL_VALIDATION	Validate training hours (payroll administrator view) and send DIF data to the payroll system for processing.

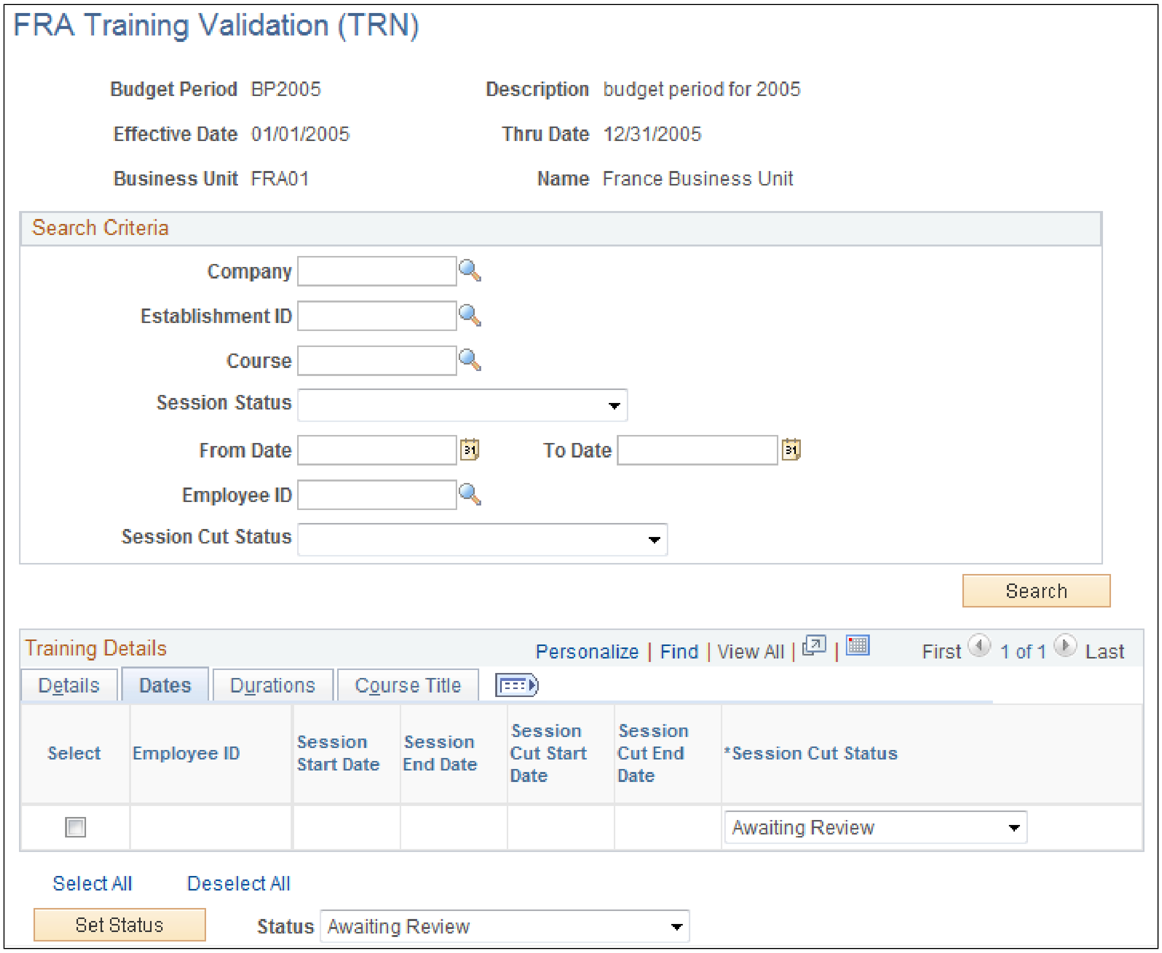
FRA Training Admin Validation Page

Use the FRA Training Admin Validation page (TRN_COL_VALIDATION) to validate training hours (training administrator view).

Navigation:

Administer Training > **Result Tracking** > **FRA Training Admin Validation** > **FRA Training Admin Validation**

This example illustrates the fields and controls on the FRA Training Admin Validation page - Dates tab. You can find definitions for the fields and controls later on this page.



The FRA Training Admin Validation page enables training administrators to validate training data before it is sent to payroll for processing. Because the fields on this page are almost identical to those on the FRA Training Validation (GP) - FRA Training Admin Validation page, we describe only the differences between them in this section.

Note: For information about the fields that are shared by these components, review the section titled *Validating Training Data as a Payroll Administrator.*

The Pay Group and Calendar ID filters are available only on the payroll administrator version of the FRA Training Validation component. The **Calendars** tab appears only on the payroll administrator version of the FRA Training Validation component.

Field or Control	***Description***
Company	This filter selects students that have the specified company in their training record. **Note:** Only companies that are part of the business unit can be selected.

<table>
<tr><th>Field or Control</th><th>Description</th></tr>
<tr><td>Establishment ID</td><td>This filter selects students that are part of the specified establishment based on the department stored in the training record.

Note: Only establishments related to the specified company are available for selection. When no company is selected, all establishments for the business unit can be used.</td></tr>
<tr><td>Course</td><td>This filter selects courses from the training record.

Note: Only courses with session dates that occur during the budget period can be selected.</td></tr>
<tr><td>Session Status</td><td>Valid values are Active, Canceled, and Complete.

This filter selects course sessions that have the specified attendance status in the training record.</td></tr>
<tr><td>From Date and To Date</td><td>This filter selects course session cuts with a start date greater than or equal to the specified From Date and with an end date less than or equal to the To date.

Note: You can enter any from or to dates included in the budget period.</td></tr>
<tr><td>Employee ID</td><td>This filter selects students from the training record.

Note: When you filter by company and/or establishment, only employees belonging to the company or establishment appear in the prompt. Otherwise, any employee in the business unit can be selected.</td></tr>
<tr><td>Session Cut Status</td><td>Valid values are:
None: No filter is used and all sessions are selected.
Awaiting Review: Only session cuts with this status are selected.
Appr by Training Administrator: Only session cuts with this status are selected.
Appr by Payroll Administrator: Only session cuts with this status are selected.
Finalized: Only session cuts with this status are selected.
Note: Define the status of a session cut on the Training Hours Details page.</td></tr>
</table>

Action

Use the fields in the Action group box to select or deselect students in the grid and then update the Calendar and Session Cut Status fields in all selected rows.

Field or Control	*Description*
Set Calendar	Select to set a default calendar for all selected session cuts. You can set calendars by *Start Date* or *End Date*. This button and the start and end date options in the drop down list are visible only in the payroll administrator version of this component. When you click the **Set Calendar** button, the application sets the calendar for the current employee ID, employee record number, and pay group. If the employee record number or the pay group have not been previously specified, the system provides a default value for the employee record number and the pay group. It then retrieves the first payroll calendar that is not finalized with a period that includes the Start Date or the End Date (depending on your selection). The system retrieves the employee record and pay group from the JOB DATA record. The values retrieved are those associated with the employee's primary job. **Note:** The employee record and paygroup are populated when you click the search button on the FRA Training Validation page. **Note:** This feature applies only to students processed with Global Payroll for France.

Field or Control	*Description*
Set Status	Click this button to define the session cut status for all selected sessions cuts. Valid values are: • *Awaiting Review.* • *Appr by Payroll Administrator.* • *Appr by Training Administrator.* The same rules that apply to status values defined using the Session Cut Status field apply to values defined using the Action group box. **Note:** You can change the status to *Awaiting Review* from *Appr by Training Administrator* or *Appr by Payroll Administrator.* You can also change the status to *Appr by Training Administrator* from *Appr by Payroll Administrator.* However, you cannot change the status with this button after it is set to *Finalized.*

Note: When you click Save, the system sends all rows with the status *Appr by Payroll Administrator* to Global Payroll as positive input for processing in the next payroll run. When the system generates positive input for a session cut, it automatically sets the session cut status to *Finalized.* You cannot modify this status. If you need to make changes to the positive input data, you must make them directly in the payroll application.

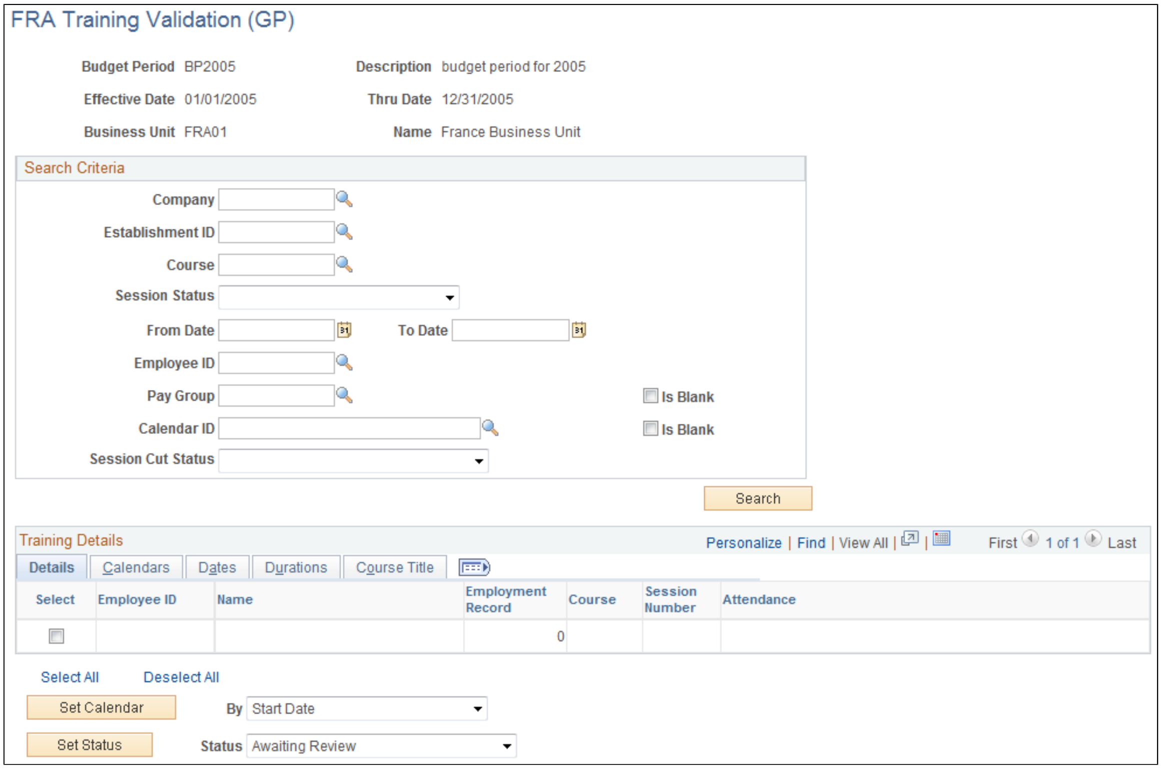
FRA Training Validation (GP) Page

Use the FRA Training Validation (GP) page (TRN_COL_VALIDATION) to validate training hours (payroll administrator view) and send DIF data to the payroll system for processing.

Navigation:

Administer Training > **Result Tracking** > **FRA Training Validation (GP)** > **FRA Training Validation (GP)**

This example illustrates the fields and controls on the FRA Training Validation (GP) page. You can find definitions for the fields and controls later on this page.



To limit the scope of the information displayed, you must specify the Business Unit when entering the component.

When you are in the component, use one or more of the filters described here to limit the students and course sessions displayed in the Training Details group box:

Field or Control	Description
Pay Group	This filter selects students who are managed by Global Payroll for France and who are part of the specified pay group. Students managed by other payroll systems are not selected or excluded by this filter. Select the related **Is Blank** check box to indicate that you want the system to retrieve students for whom there is no pay group in the Global Payroll pay group table. **Note:** This filter is available only in the payroll administrator version of the FRA Training Validation component if the Global Payroll for France product is installed.

Field or Control	Description
Calendar ID	This filter selects students who are managed by PeopleSoft Global Payroll for France and who are included in the specified calendar. Students managed by other payroll systems are not selected or excluded by this filter. Select the related **Is Blank** check box to indicate that you want the system to retrieve students for whom there is no calendar ID in the Global Payroll calendar table. **Note:** This filter is available only in the payroll administrator version of the FRA Training Validation component if the Global Payroll for France product is installed.
Session Cut Status	This field is similar to the **Session Cut Status** field on the FRA Training Validation (GP) page; however, training administrators cannot change the **Session Cut Status** to *Appr by Payroll Administrator* on the training administrator component. If the training administrator attempts to apply this status to a row of data, the following warning message appears: *You are not authorized to change the status.* **Note:** Only payroll administrators are authorized to set the status of a session cut to *Appr by Payroll Administrator* and send validated training data to payroll for processing. The payroll administrator can do this only on the FRA Training Validation (GP) page.
Search	Click this button to refresh the session cuts listed in the grid at the bottom of the page based on the selected filters. **Note:** You can change the pay group, the calendar ID, and the Session Cut Status within the grid; however, you should use caution when doing this, as these changes are recorded in the database when you click the Save button (changing the values of filter fields is not considered a data change because these values are not stored in the database).

Training Details: Calendars Tab

Select the Calendars tab.

The fields on the Calendars tab are populated when you click the Search button

This tab appears only on the Payroll Administrator version of the FRA Training Validation component.

Field or Control	Description
Select	Use this check box to select rows on which to apply an action. The proposed actions are shown in the Action group box at the bottom of the page.

Field or Control	*Description*
Pay Group	This field appears only for employees processed using Global Payroll for France. If you do not specify the pay group in the search criteria, the system retrieves the pay group from the JOB DATA record for the employee identified in the grid with the maximum job effective date less than or equal to the session cut start date. **Note:** The employee record and paygroup are populated when you click the search button on the FRA Training Validation page.
Calendar ID	This field appears only for employees processed with Global Payroll for France. It is enabled only if the session cut status is *Awaiting Review* or *Appr by Training Administrator*. The prompt displays the list of monthly payroll calendars from the Global Payroll calendar setup table that meet the following criteria: period begin date <= session cut start date/end date (depending on the calendar selection specified in the Action group box) <= period end date. When the calendar is finalized, the letter "F" appears in the grid near the calendar field to warn users that there may be retroactive processing if the training information is saved to the database. ***Warning!*** Sending training information to a finalized calendar may trigger retroactive processing.

Field or Control	*Description*
Learning Comp. Status	This field appears on all tabs in the Training Details group box. Valid values are: • *Awaiting Review*: When you set this status, the Empl Rcd Nbr, Pay Group, and Calendar ID fields are enabled. • *Appr by Payroll Administrator*: When you set this status, the Empl Rcd Nbr, Pay Group, and Calendar ID fields are disabled. If the session cut extends beyond the calendar period, the following warning message appears: *This session spreads over multiple calendars. Please make sure that the correct calendar is assigned.* If the payroll administrator tries to approve a finalized calendar, the following warning message appears: *The selected calendar is finalized.* This message warns the administrator that there may be retroactive processing if the training information is saved to the database. • *Appr by Training Administrator:* When you set this status, the **Empl Rcd Nbr, Pay Group,** and **Calendar ID** fields are enabled. • *Finalized*: You cannot manually set the status to *Finalized.* This status appears only when the training information has been validated and sent to the payroll system. To send the data to the payroll system, set the status to *Appr by Payroll Administrator* and save the page. **Note:** This field and its associated values are also available on the training administrator version of the FRA Training Validation component. However, when the training administrator tries to set the status to *Appr by Payroll Administrator,* an error message appears: *You are not authorized to change the above status.* By contrast, payroll administrators are authorized to change the status to *Appr by Training Administrator.* If an employee has both the Training Administrator and Payroll Administrator roles, he can skip the Training Validation (HR) page and set both statuses on the Training Validation (GP) page. **Note:** When you save the page, the row with the *Appr by Payroll Administrator* status is disabled and you can no longer modify the data.

Training Details: Dates Tab

Select the Dates tab.

The fields on the Dates tab are populated when the payroll administrator clicks the Search button.

The fields on this tab appear on both the payroll administrator and training administrator versions of the FRA Training Validation component.

Field or Control	***Description***
Session Start Date	This field displays the start date of the entire training session. This is the date defined on the Course Session Profile page (Enterprise Learning, Define Course/Cost Details, Course Sessions).
Session End Date	This field displays the end date of the entire training session. This is the date defined on the Course Session Profile page.
Session Cut Start Date	This field displays the session cut start date. This is the date defined on the Location, Instructor page (Enterprise Learning, Define Course/Cost Details, Course Sessions).
Session Cut End Date	This field displays the session cut end date. This is the date defined on the Location, Instructor page.
Session Cut Status	This is the same field described in the section on the Calendars tab.

Training Details-Durations

Select the Durations tab.

The fields on the Durations tab are populated when the payroll administrator clicks the Search button.

The fields on this tab appear on both the payroll administrator and training administrator versions of the FRA Training Validation component.

Field or Control	***Description***
Session Cut Duration	This field displays the duration in hours of the session cut. This information comes from the Demand From Budget Training component (TRN_STUDNT_CRS_DT2).

Field or Control	***Description***
DIF in working Schedule	This field displays the duration in hours entered in the Demand From Budget Training component. This information is sent to the payroll system when the row is approved and saved.
DIF out of working Schedule	This field displays the duration in hours entered in the Demand From Budget Training component. This information is sent to the payroll system when the row is approved and saved.
Out of working Schedule	This field displays the duration in hours for skills development entered in the Demand From Budget Training component. This information is sent to the payroll system when the row is approved and saved.
Session Cut Status	This is the same field described in the section on the Calendars tab.

Action

You cannot set the session cut status to *Appr by Payroll Administrator* for multiple students using the mass update capabilities provided by the fields in the Action group box.

The Set Calendar button is not available in the training administrator version of the FRA Training Validation component.

Sending DIF Training Data to Global Payroll

This topic provides an overview of how the PeopleSoft system sends DIF training data to Global Payroll for processing.

Understanding How Data is Sent to The Global Payroll

When the payroll administrator saves the DIF training hours on the FRA Training Validation (GP) page, the system creates positive input for the current pay group, calendar, employee ID, and employee record number. This data triggers processing of one or more DIF entitlement (earning) elements in the next Global Payroll run. When the system generates positive input for a session cut, it sets the session cut status to *Finalized* on the FRA Training Validation (GP) and FRA Training Admin Validation components.

This table lists the *in working hours* DIF entitlement elements for which the system creates positive input:

Payroll Element	***Description***
HRS DIF PEND	When DIF hours within the work schedule are > 0, the system assigns the earning HRS DIF PEND to the payee using positive input. This earning has a calculation rule of Amount. The amount is defined as the formula FOR FM DIF PENDANT.
FOR VR HRS DIF	This variable stores DIF hours within the work schedule to process in the current payroll calendar. These hours are used by the formula FOR FM DIF PENDANT to calculate the earning element HRS DIF PEND. It is populated using a supporting element override.

This table lists the *out of working hours* DIF elements for which the system creates positive input:

Payroll Element	***Description***
HRS DIF HORS	When DIF hours outside the normal work schedule are > 0, the system assigns the earning HRS DIF HORS to the payee using positive input. This earning has a calculation rule of Unit x Rate, with the rate defined as the formula FOR FM TX DIF-DEV, and the unit defined as the formula FOR FM DIF HORS.
FOR VR HRS DIF	This variable stores DIF hours for training that takes place outside of the normal work schedule to process in the current payroll calendar. It is populated using a supporting element override.
FOR VR DT DEB FOR	This variable stores the session cut start date for DIF training that occurs outside of normal work hours. It is populated using a supporting element override.

This table lists the *out of working schedule training hours* elements for which the system creates positive input:

Payroll Element	***Description***
HRS DEV HORS	When skills development hours outside the normal work schedule are > 0, the system assigns the earning HRS DEV HORS to the payee using positive input. This earning has a calculation rule of Unit x Rate, with the rate defined as the formula FOR FM TX DIF-DEV, and the unit defined through payee level input.

Payroll Element	Description
FOR VR DT DEB FOR	This variable stores the session cut start date for skills development training that occurs outside of normal work hours. It is populated using a supporting element override.

Importing Payroll Data Into Administer Training

These topic provide an overview of the data import process and discuss the page used to import payroll data into Administer Training from Global Payroll for France.

Understanding the Data Import Process

When you run the Global Payroll process, the system calculates both the DIF entitlement balance (FOR AC DROIT DIF) and DIF in advance hours (FOR VR DIF NEGATIF) for all trainees and loads this data into a table using the writable array FOR WA DIF HR. When you run the import process on the DIF Payroll Import page, the system imports the entitlement balance and DIF in advance from this table into Administer Training. You can then view this information on the enrollment pages and determine whether there are enough hours in a student's DIF balance to permit additional DIF allocations.

Note: The element FOR AC DROIT DIF stores the DIF entitlement balance and is calculated as the trainee's DIF allocation minus the DIF hours already used. The element FOR VR DIF NEGATIF stores the number of hours of additional DIF training (DIF in advance) that can be granted beyond what is available in the DIF balance. When you run the import process, the value of these elements appears on the Training Hours Details page.

Page Used to Import Data Into Administer Training

Page Name	Definition Name	Navigation	Usage
DIF Payroll Import FRA	RUNCTL_TRN_DIF	**Administer Training** > **Result Tracking** > **DIF Payroll Import FRA** > **DIF Payroll Import FRA**	Import DIF data into Administer Training.

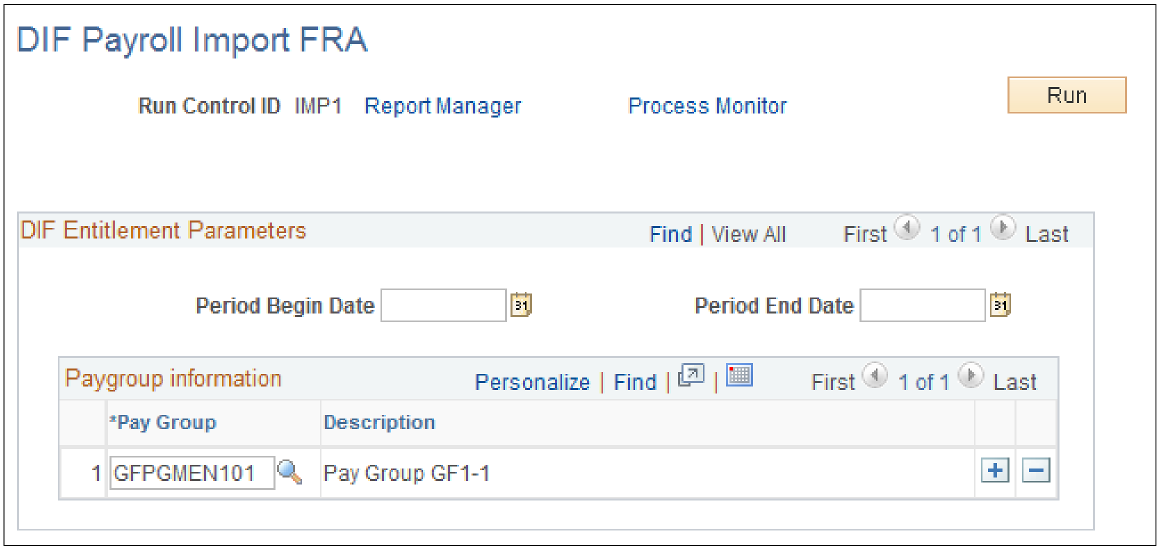
DIF Payroll Import FRA Page

Use the DIF Payroll Import FRA page (RUNCTL_TRN_DIF) to import DIF data into Administer Training.

Navigation:

Administer Training > **Result Tracking** > **DIF Payroll Import FRA** > **DIF Payroll Import FRA**

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



Field or Control	***Description***
Period Begin and End Date	Enter the dates of the payroll period for which you want to retrieve data.
Pay Group	Specify the pay group for which you want to retrieve the DIF data.
Run	Click to initiate the import process.

Note: Depending on company policy, you can allocate DIF training hours that exceed the entitlement balance by allowing the DIF entitlement to go into negative numbers. For example, if a trainee's DIF entitlement balance is 2, you can grant a total of 7 DIF hours by enabling the DIF entitlement balance to drop to –5. To do this, access one of the supporting element override pages in Global Payroll and set the value of FOR VR DIF NEGATIF to 5.

Note: This same process is used to both retrieve the hours from Global Payroll and for publishing them into ELM when the ELM product is flagged in the Installation table.

Chapter 13

(FRA) Producing the French Training Report 2483

Understanding the French Training Report 2483 Process

The Training Report 2483 (TRN029), also called the Declaration 2483 Report, is a French regulatory report that is used to declare the vocational training that your company has provided to its employees. This report compiles information about the amount of money that your company spends on training.

The report provides details for groups of information that are defined by the French government. PeopleSoft delivers the groups as system data in HR.

Note: Any changes that you make to these groups directly affect the way that the system generates the French Training Report 2483. Therefore, you should make changes only in response to changes in the French regulatory reporting requirements.

Here is an overview of how to prepare the Training Report 2483:

1. Trainings are recorded, employees are enrolled, and costs are associated with those trainings/students.
2. (Optional) Review the setup for training report groups.
3. (Optional) Review the setup for training report indicators.
4. Enter training report parameters.
5. Run the Compute Training Report 2483 (DEC2483) process calculation for all indicators.
6. (Optional) Review and edit the results of the process calculations.
7. Run the Training Report 2483 (TRN029) to print (or export to a file) the results of the process calculations.

Note: When using ELM and Administer Training, the setup of the learning catalog, instructors, vendors, and so on, as well as tracking of learning costs and enrollment and other day-to-day tasks should be done in ELM. In this case, the Administer Training components are used to compile costs and generate the 2483 reports.

See product documentation for *PeopleSoft Enterprise Learning Management,* “(FRA) Managing French Regulatory Requirements”.

Related Links

Understanding Training Costs

Understanding Student Enrollment Options

Reviewing the Setup for Groups and Indicators

These topics discuss how to:

- Review the group setup.
- Review the indicator setup.

Pages Used to Review Training Report Groups and Indicators

Page Name	***Definition Name***	***Usage***
2483 Group Page	GROUP_2483_TBL_FRA	Review the group setup for the French Training Report 2483.
2483 Indicator Page	INDIC_2483_TBL_FRA	Review the indicator setup for the French Training Report 2483 groups.

2483 Group Page

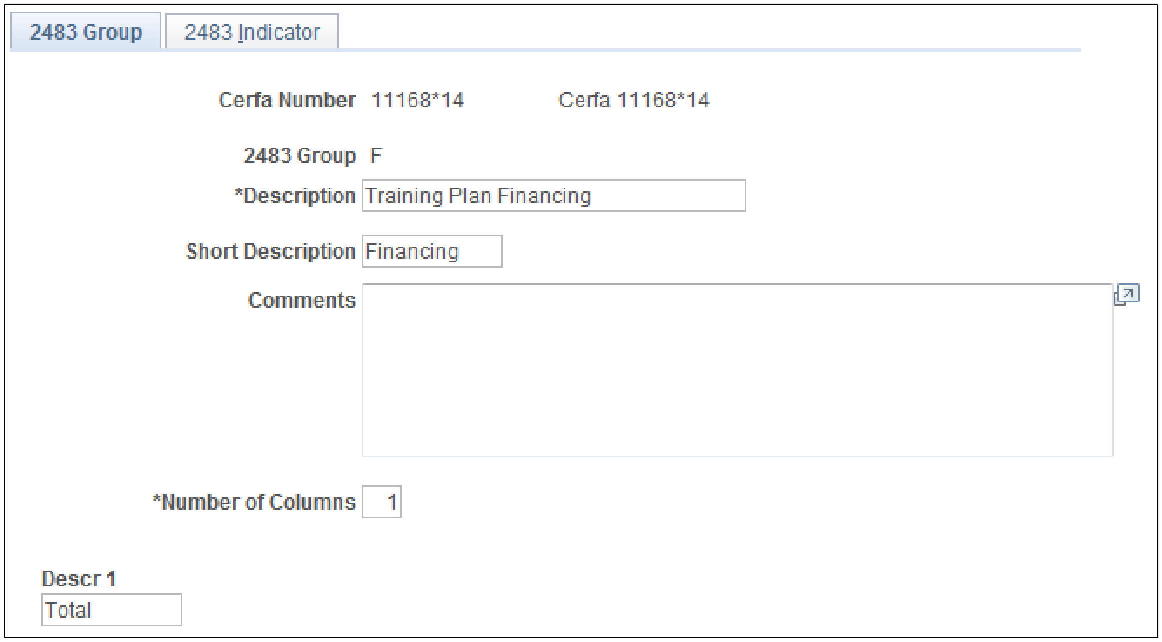
Use the 2483 Group page (GROUP_2483_TBL_FRA) to review the group setup for the French Training Report 2483.

Information in the 2483 report is organized by group. The groups are identified by a letter, for example, C represents Training Costs and D represents OPCA Designation.

Navigation:

Set Up HCM > **Product Related** > **Enterprise Learning** > **2483 Indicators FRA** > **2483 Group**

This example illustrates the fields and controls on the 2483 Group page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Comments	Comments that you enter here do not appear on the report.
Number of Columns	This field controls the number of columns that the report includes, by default, for this group. It also controls the number of Descr (description) fields that display on this page.
Descr. 1 (description 1) through **Descr. 6** (description 6)	These fields define the column labels that appear in the report for the group, by default.

When you use the 2483 Indicators page to define a new indicator for a group, the indicator inherits the default values for columns and descriptions that are defined here.

The following groups (used in the **2483 Group** field) are delivered with HR:

Group ID	*Description*
A	Monthly average headcount
B	Headcount, Training Hours **Note:** (FRA) For indicators 11 and 12, when running the 2483 Computation process on Sybase, the process does not check if the cost is fully chargeable for the company or not. In other words, the training is included in the indicator count even if financing costs exist for training.

Group ID	***Description***
C	Total Compensation
D	Training Leave Financing
E	Professionalization Financing
F	Training Plan Financing
G	CDD Training Leave Financing
H	Public Revenue Dept Payment
I	Carry-Forward Surplus

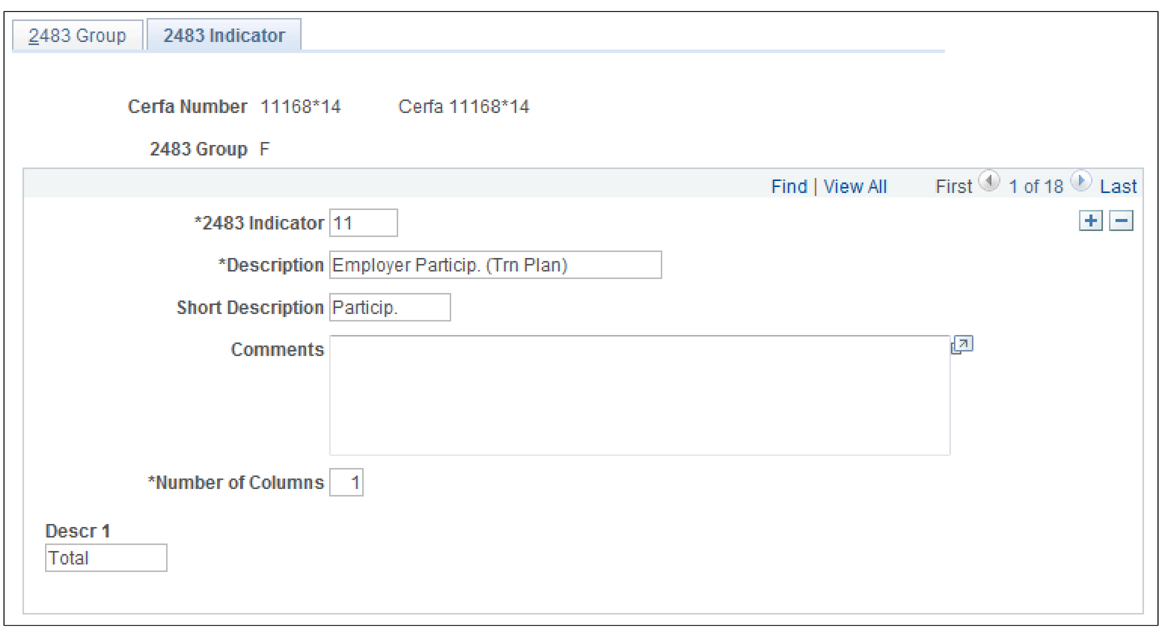
2483 Indicator Page

Use the 2483 Indicator page (INDIC_2483_TBL_FRA) to review the indicator setup for the French Training Report 2483 groups.

Navigation:

Set Up HCM > **Product Related** > **Enterprise Learning** > **2483 Indicators FRA** > **2483 Indicator**

This example illustrates the fields and controls on the 2483 Indicator page. You can find definitions for the fields and controls later on this page.



Each group can include multiple indicators. Use this page to view the indicators that are associated with a particular group.

PeopleSoft provides the appropriate labels for each column. The report prints the values in the **Descr 1** through **Descr 6** fields as the indicator labels on the French Training Report.

Entering Additional Report Parameters

The 2483 report requires additional parameters that are not stored in HR. Before you run the report, you must enter these parameters into the system.

Pages Used to Enter Additional Report Parameters

Page Name	***Definition Name***	***Usage***
Trn 2483 Parameters Setup Page	TRN_2483_PARM	Enter parameters that are required for the 2483 report. This page is dedicated to one company and one declaring year.
Trn 2483 Company Costs Page	TRN_2483_CPNY_COST	Enter costs related to a civil year (2483 declaring year). These costs are dedicated to the 2483 report and are not included in the computation of other training processes.

Trn 2483 Parameters Setup Page

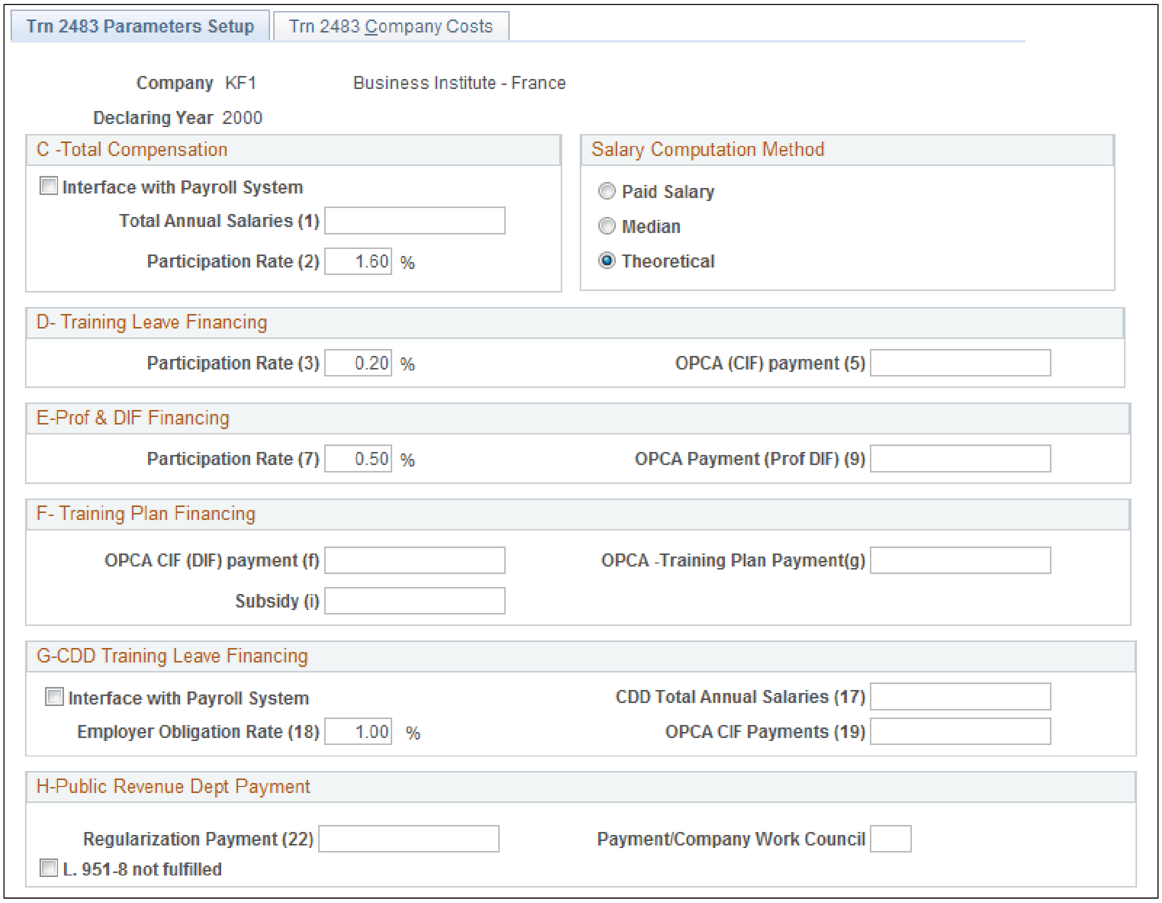
Use the Trn 2483 Parameters Setup (training 2483 parameters setup) page (TRN_2483_PARM) to enter parameters that are required for the 2483 report.

This page is dedicated to one company and one declaring year.

Navigation:

Set Up HCM > **Product Related** > **Enterprise Learning** > **2483 Parameters FRA** > **Trn 2483 Parameters Setup**

This example illustrates the fields and controls on the Trn 2483 Parameters Setup page. You can find definitions for the fields and controls later on this page.



Group C - Total Compensation

Field or Control	***Description***
Interface with Payroll System (reduction rate [10 employee mark])	Select if the amount of total compensation is to be calculated from the salaries the system retrieves from Global Payroll. **Note:** When **Interface with Payroll System** is selected, the field **Total Salaries (1)** is unavailable.
Total Annual Salaries (1)	Enter the total of the annual salaries for your organization.
Participation Rate (2)	Enter the rate applied to the Total Annual Salaries to calculate the amount that the company should spend on Trainings. This rate equals 1.6 by default.

Salary Computation Method

These options are used to estimate the employee salary costs that are charged in the 2483 report.

Field or Control	***Description***
Paid Salary	When you select this option, the Compute 2483 process prorates the employee's monthly salary for each session and then calculates the sum for all sessions. The system validates that the Paid Salary method is consistent with the salaries stored on the Update Salary Costs page, Period tab. All employees for the related company and related year should have the **Calc. Flag** field equal to *Payroll* or *Manually.*
Median	When you select this option, the Compute 2483 process divides the total training hours (the duration of all sessions) by total paid hours and multiplies the result by an employee's average annual salary. Salaries come from Global Payroll for France or are entered manually. The system verifies that the Median method is consistent with the salaries stored on the Update Salary Costs page, Period tab. All employees for the related company and related year should have the **Calc. flag** equal to *Payroll, Job Code,* or *Manually.* This option is the default.
Theoretical	The theoretical method is similar to the median method and should be selected when salaries have been entered manually or have been defined for each job code. When you select this option, the Compute 2483 process divides the total training hours (based on session duration) by total paid hours and multiplies the result by the employee's annual compensation. The system verifies that the Theoretical method is consistent with the salaries stored on the Update Salary Costs page, Period tab. All employees for the related company and related year should have the **Calc. flag** equal to *Employee, Job Code,* or *Manually.*

Group D - Training Leave Financing

Field or Control	***Description***
Participation Rate (3)	Enter the rate applied to the Total Annual Salaries to calculate the amount that the company should spend on Training Leaves (CIF in French). This rate equals 0.2 by default.
OPACIF Payment (5)	Enter the amount that is paid to a registered body for training leave for limited contract employees.

Group E - Prof. & DIF Financing (Professionalization and Droit Individuel a la Formation [Individual Training Rights])

Field or Control	***Description***
Participation Rate (7)	Enter the rate applied to the Total Annual Salaries to calculate the amount that the company should spend on professionalization periods and contracts, and DIF. This rate equals 0.5 by default.
OPCA Payment (Prof. DIF) (9)	Enter the amount that is paid to a registered body for professionalization periods and contracts, and DIF.

Group F - Training Plan Financing

Field or Control	***Description***
OPCA CIF (DIF) payment (f)	Enter the amount that is paid to a registered body for training leaves (which are also DIF).
OPCA -Training Plan Payment (g)	Enter the amount that is paid to a registered body for trainings defined in the training plan.
Subsidy (i)	Enter the amount of subsidy granted for training purposes. The subsidy should be granted by government bodies (received by the company) during the declaring year.

Group G - CDD Training Leave Financing

Field or Control	***Description***
Interface with Payroll System	Select if the amount of CDD Training Leave Financing is to be retrieved from Global Payroll.
CDD Total Annual Salaries (17)	Enter the total salaries for all limited contract employees.
Employer Obligation Rate (18)	Enter a percentage rate. This rate equals 1 by default. It is applied to the CDD Total Annual Salaries to calculate the amount that the company should spend on trainings for CDD.
OPCA CIF Payments (19)	Enter the amount that is paid to a registered body for training leave for limited contract employees.

Group H - Public Revenue Dept Payment

Field or Control	***Description***
Regularization Payment (22)	If your organization hasn't spent the required training amounts declared in previous 2483 reports (because the corresponding trainings were supposed to cover several years), you must make a regularization payment to the French authorities. Enter the amount of the payment.
Payment/Company Work Council	Enter the number of attached documents for the declaration report.
L. 951-8 not fulfilled	Select this option when you know that this law does not apply.

Trn 2483 Company Costs Page

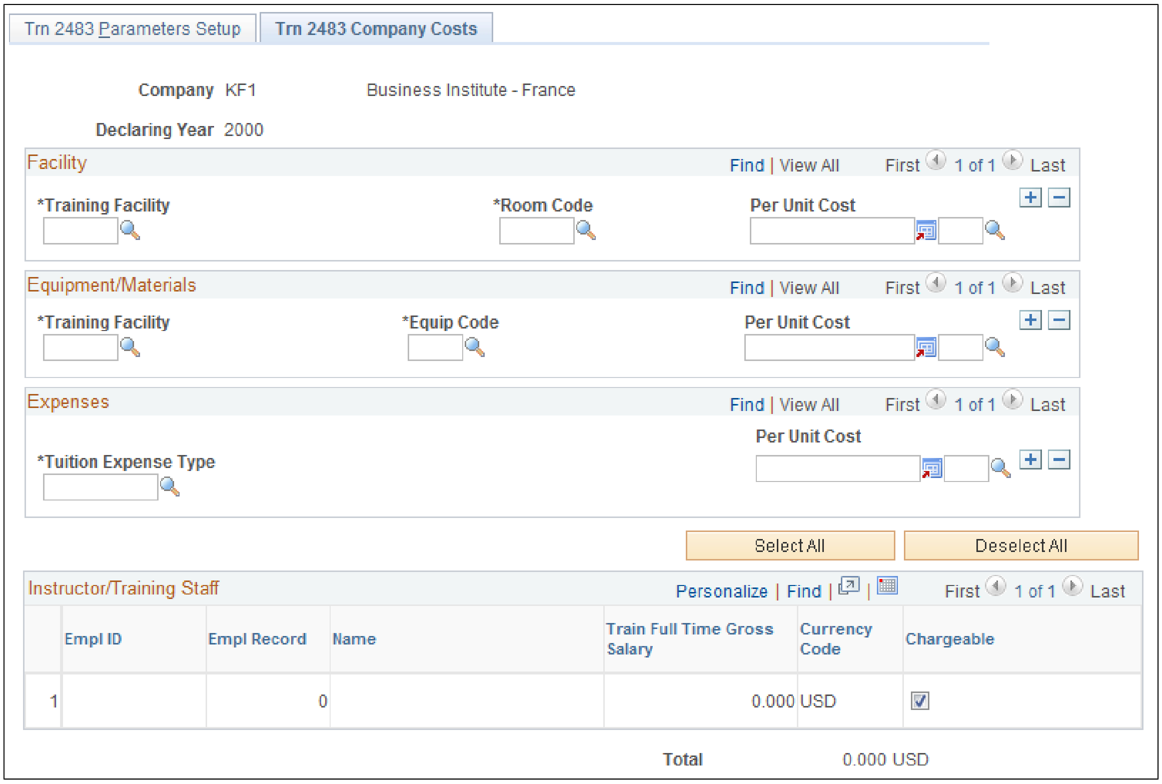
Use the Trn 2483 Company Costs (training 2483 company costs) page (TRN_2483_CPNY_COST) to enter costs related to a civil year (2483 declaring year).

These costs are dedicated to the 2483 report and are not included in the computation of other training processes.

Navigation:

Set Up HCM > **Product Related** > **Enterprise Learning** > **2483 Parameters FRA** > **Trn 2483 Company Costs**

This example illustrates the fields and controls on the Trn 2483 Company Costs page. You can find definitions for the fields and controls later on this page.



Note: Most training costs are processed through the Compute Student Cost process and are then available at the employee level. These costs (available in the Maintain Student Cost pages) are used to calculate most financial indicators of the 2483 report. However, certain company costs such as facility, equipment and materials expenses go directly on the 2483 report without any conversion or calculation. Use this page to charge these costs to the declaring company no matter what the length of the training session or number of students. Be sure to set **Cost Unit Type** on the Cost Unit page to *Company.*

See Understanding Training Costs.

Facility

Field or Control	***Description***
Training Facility	Enter the training facility where training was provided.
Room Code	Enter the room code where training occurred. Each room in a training facility must have a unique room code.

Equipment/Materials

Field or Control	***Description***
Training Facility	Enter the training facility where training equipment and materials will be used.
Equip Code (equipment code)	Enter the equipment code of equipment and materials used for training.

Expenses

Field or Control	***Description***
Tuition Expense Type	Define miscellaneous expenses that are associated with a training session.

Instructor/Training Staff

Field or Control	***Description***
Chargeable	Instructor/Training Staff salaries are retrieved automatically and the check box is selected by default. You may deselect this check box for rows that you do not wish to be included in the 2483 report. This group box links to the Trainees Salary Costs page. Employees that appear in this section (those defined as Full Time Instructor and training staff employees that are fully dedicated to the training department) are chargeable. To confirm that their annual total compensation appears on the 2483 report, select the **Chargeable** check box. Click the **Select All** button to set all employees to chargeable at once.

Running the Report Process and Reviewing Results

These topics discuss how to run and review the report process.

Pages Used to Run the Report Process and Review Results

Page Name	*Definition Name*	*Usage*
Compute 2483 FRA Page	RUNCTL_DEC2483	Run the Compute Training Report 2483 process.
Edit 2483 FRA Page	EDIT_2483_FRA	Review and edit the results of the calculations that are run by the Compute Training Report process on each of the indicators.

Compute 2483 FRA Page

Use the Compute 2483 FRA page (RUNCTL_DEC2483) to run the Compute Training Report 2483 process.

Navigation:

Administer Training > **Training Reports** > **Compute 2483 FRA** > **Compute 2483 FRA**

This example illustrates the fields and controls on the Compute 2483 FRA page. You can find definitions for the fields and controls later on this page.

Run this process once you have entered all the training report group and indicator information.

Field or Control	***Description***
Company	Select the company that is to run the French Training Report 2483.
Declaring Year	Enter the calendar year that the system is to use to determine cost information for that report. ***Warning!*** This process will override any previous results. You may lose any modifications that you made manually

See product documentation for *PeopleTools: Application Engine* and *PeopleTools: Process Scheduler*.

Edit 2483 FRA Page

Use the Edit 2483 FRA page (EDIT_2483_FRA) to review and edit the results of the calculations that are run by the Compute Training Report process on each of the indicators.

Navigation:

Administer Training > **Training Reports** > **Edit 2483 FRA** > **Edit 2483 FRA**

You can edit any amount on this page.

Some indicators cannot be calculated. For those indicators, compile the information manually and use this page to enter it into the system.

Note: If you rerun the Declaration 2483 process after making edits to the amounts on this page, the system overwrites the edits that you made to the Declaration 2483 results prior to rerunning the Declaration 2483 process.

Related Links

Entering Additional Report Parameters

Running the Report

When you are satisfied with the results of the Compute Training Report process, complete the CERFA form and submit. The indicators that are required by the French government are calculated by HR and tabulated in this report.

Note: If you rerun the Declaration 2483 process after making edits to the amounts on this page, the system overwrites the edits that you made to the Declaration 2483 results prior to rerunning the Declaration 2483 process.

Page Used to Run the Report

Page Name	***Definition Name***	***Navigation***	***Usage***
2483 Tax Declaration FRA	RUNCTL_TRN029	**Administer Training** > **Training Reports** > **2483 Tax Declaration FRA** > **2483 Tax Declaration FRA**	Compiles results of calculation of the 2483 indicators for declaring vocational training of employees in French organizations. Before running this report, run the Compute Training Report 2483 (DEC2483) process to calculate the indicators. Check the calculation results and do any updating on the FRA Edit 2483 - Edit 2483 page.

Chapter 14

(MEX) Running Mexican Training Reports

Understanding Mexican Training Requirements

As a company operating in Mexico, you are required to create training and development plans for your employees. The plan consists of identifying courses and events that meet the training and development needs of the workforce. Each course or event should have a detailed description of the objective and activities. Training can be internal or external.

In Mexican companies, a mixed committee is formed to oversee the training and development process for employees. The mixed committee is made up of an equal number of employee and employer representatives and is selected annually. You define details for the mixed committee on the Mixed Committee page.

The mixed committee for training and development must review and approve the training plan for your company.

Depending on the type of training, there are specific legal forms to fill out. With Administer Training, you can generate reports to comply with the legal forms required by the government. This topic discusses the various statutory reports.

Related Links

"Understanding Health and Safety Incidents" (PeopleSoft Human Resources Monitor Health and Safety)

Common Elements Used ti Run Mexican Training Reports

Field or Control	***Description***
Mixed Committee	When entering information for training reports, the Mixed Committee you select must be of a Training type.
Contract Type	Specify the contract type by selecting *Individual, Collective,* or *Law.*
Plan Type	Select the type of training program or course that you want to generate the report for.

Running Mexican Training Reports

These topics discuss how to:

- Run the DC-1 reports.
- Run the DC-2 reports.
- Run the DC-2B reports.
- Run the DC-3 reports.
- Run the DC-4 reports.
- Run the DC-5 reports.

Pages Used to Run Mexican Training Reports

Page Name	*Definition Name*	*Usage*
STPS DC-1 Format MEX	RUNCTL_STP001	Run the MXSTPP001 (format) and MXS TP—2 (reverse) reports.
STPS DC-2 Format MEX	RUNCTL_STP003	Run the MXSTP003 (format) and MXSTP004 (reverse) reports.
STPS DC-2B Format MEX	RUNCTL_STP005	Run the (MEX) DC-2B Training and Development Registration Application (MXSTP005) reports.
STPS DC-3 Format MEX	RUNCTL_STP006	Run the DC 3 Courses/Events Certificates (MXSTP006) reports.
STPS DC-4 Format MEX	RUNCTL_STP007	Run the MXSTP007 report.
STPS DC-5 Format MEX	RUNCTL_STP008	Run the Training and Development External Registration Application MXSTP008 (format) and MXSTP009 (reverse) reports.

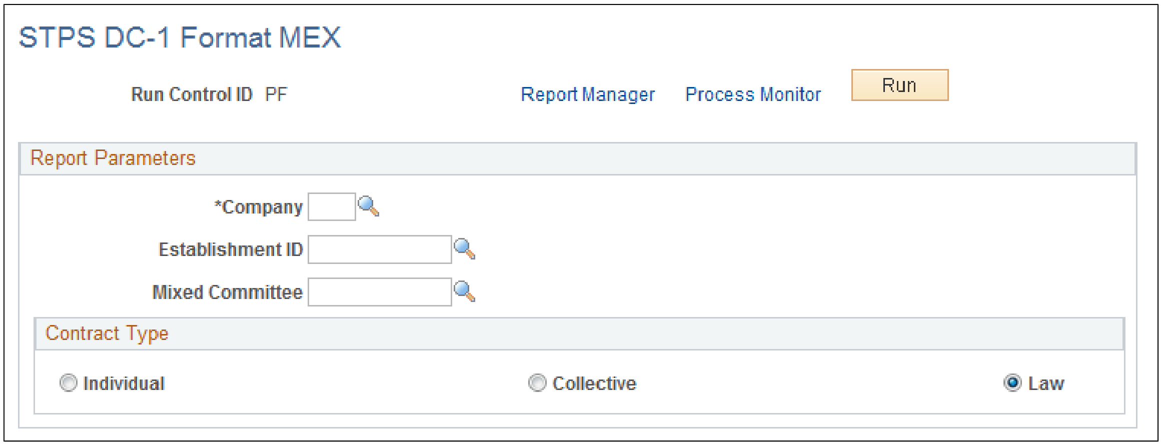
STPS DC-1 Format MEX Page

Use the STPS DC-1 Format MEX page (RUNCTL_STP001) to run the MXSTPP001 (format) and MXS TP—2 (reverse) reports.

Navigation:

Administer Training > **Training Reports** > **STPS DC-1 Format MEX** > **STPS DC-1 Format MEX**

This example illustrates the fields and controls on the STPS DC-1 Format MEX page. You can find definitions for the fields and controls later on this page.



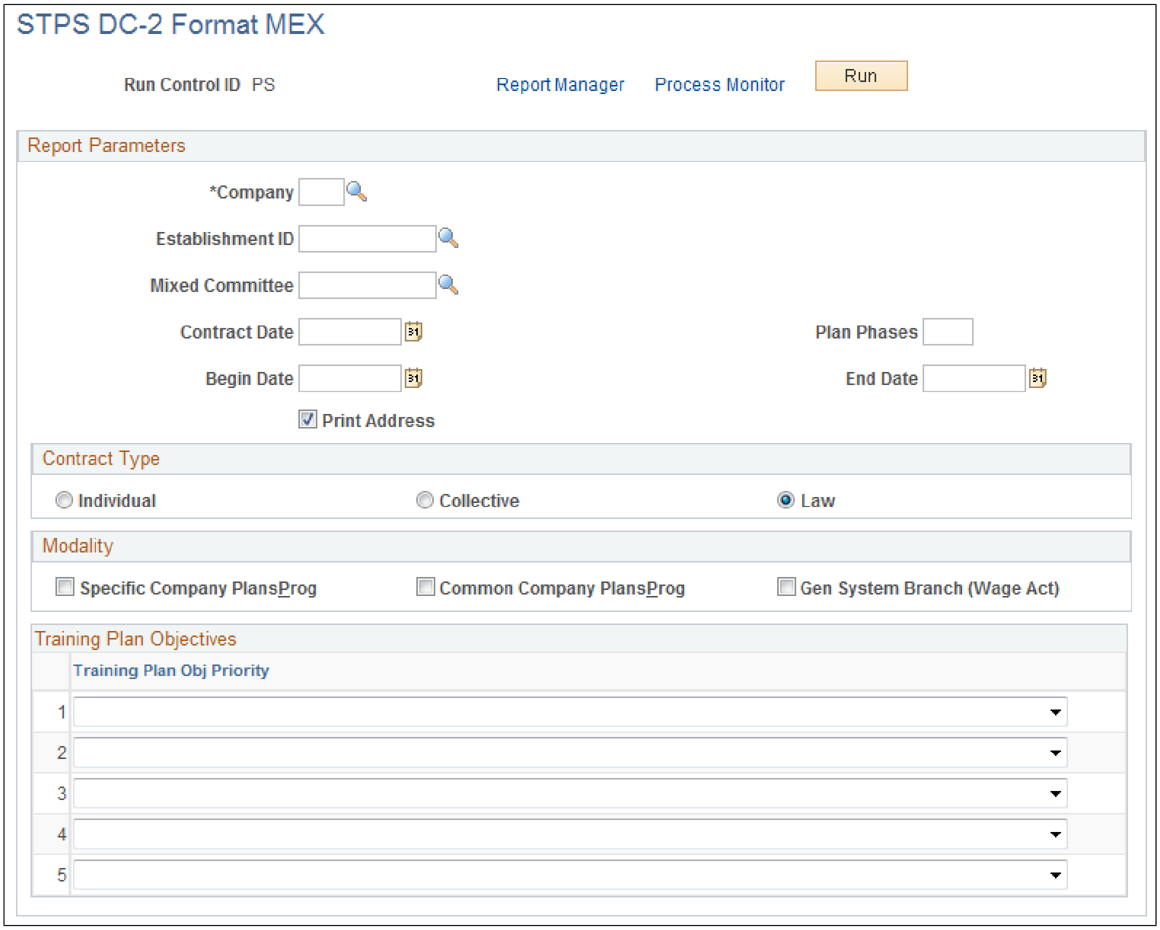
STPS DC-2 Format MEX Page

Use the STPS DC-2 Format MEX page (RUNCTL_STP003) to run the MXSTP003 (format) and MXSTP004 (reverse) reports.

Navigation:

Administer Training > **Training Reports** > **STPS DC-2 Format MEX** > **STPS DC-2 Format MEX**

This example illustrates the fields and controls on the STPS DC-2 Format MEX page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Contract Date	Enter the collective contract signature date or the collective contract revision date.
Plan Phases	Define the number of phases in which you are going to run the training program plan.
Training Plan Obj. Priority (training plan objective priority)	Values are *Increase Productivity, Prepare to Occupy New Vac/ Pos, Prevent Work Risks, Provide New Technologies Info,* and *Upg/Improve Knowledge & Comp.*

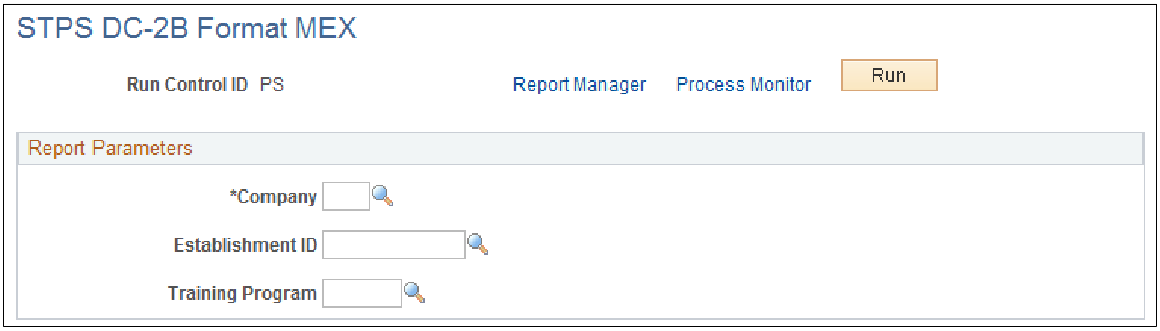
STPS DC-2B Format MEX Page

Use the STPS DC-2B Format MEX page (RUNCTL_STP005) to run the (MEX) DC-2B Training and Development Registration Application (MXSTP005) reports.

Navigation:

Administer Training > **Training Reports** > **STPS DC-2B Format MEX** > **STPS DC-2B Format MEX**

This example illustrates the fields and controls on the STPS DC-2B Format MEX page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Training Program	Select the type of training program.

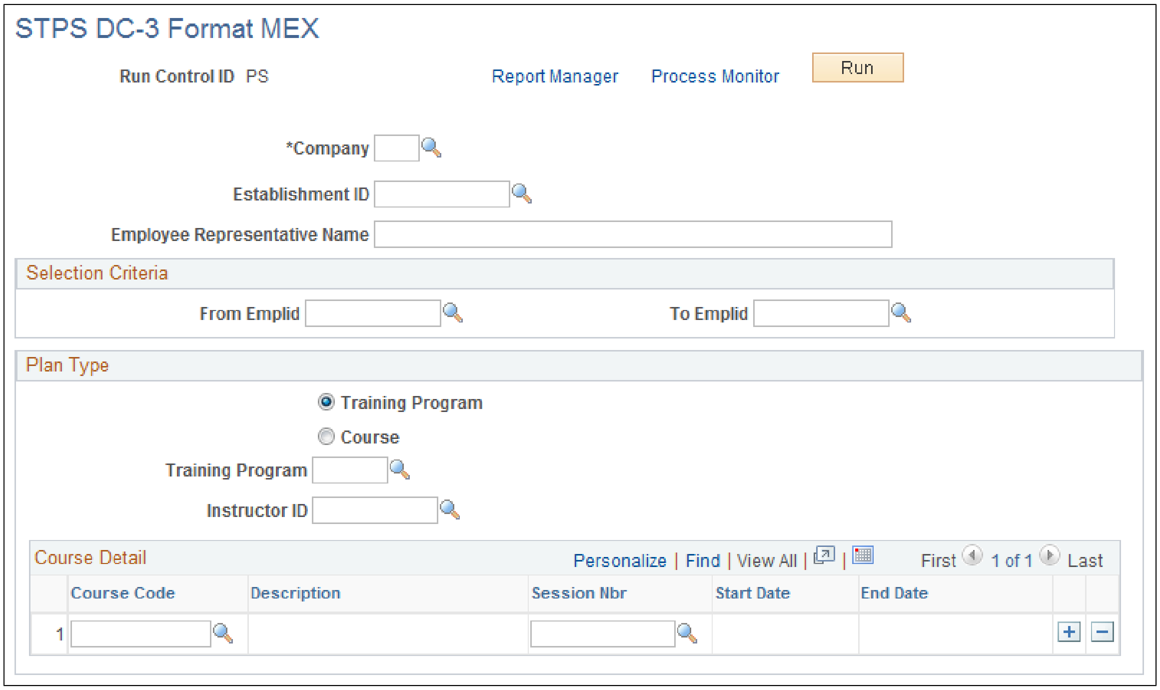
STPS DC-3 Format MEX Page

Use the STPS DC-3 Format MEX page (RUNCTL_STP006) to run the DC 3 Courses/Events Certificates (MXSTP006) reports.

Navigation:

Administer Training > **Training Reports** > **STPS DC-3 Format MEX** > **STPS DC-3 Format MEX**

This example illustrates the fields and controls on the STPS DC-3 Format MEX page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Employee Representative Name	Enter the name of the employee representative who is on the Mixed Committee.

Field or Control	***Description***
From Emplid and **To Emplid**	Enter the range of employee numbers for whom this training is being provided.

Field or Control	***Description***
Plan Type	Select the training plan type. You can select either Training Program or Course. If you select Training Program, you also need to enter the Instructor ID.

Field or Control	***Description***
Course Code	Select the course code. The course description displays next to the course code.

Field or Control	***Description***
Session Nbr	Select the session number for the course being taught.

Field or Control	***Description***
Start Date and **End Date**	Once you have entered the course code and session number, the system displays the start and end date for the next available course.

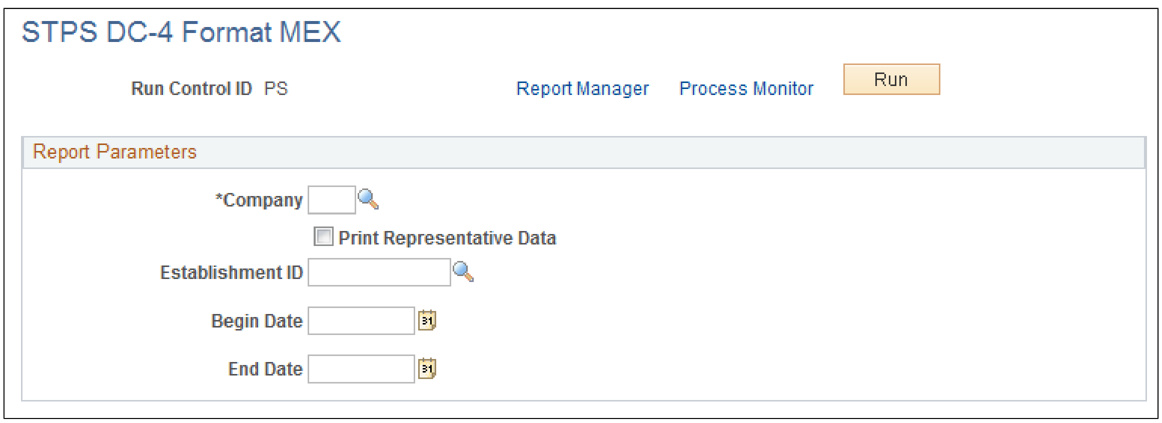
STPS DC-4 Format MEX Page

Use the STPS DC-4 Format MEX page (RUNCTL_STP007) to run the MXSTP007 report.

Navigation:

Administer Training > **Training Reports** > **STPS DC-4 Format MEX** > **STPS DC-4 Format MEX**

This example illustrates the fields and controls on the STPS DC-4 Format MEX page. You can find definitions for the fields and controls later on this page.



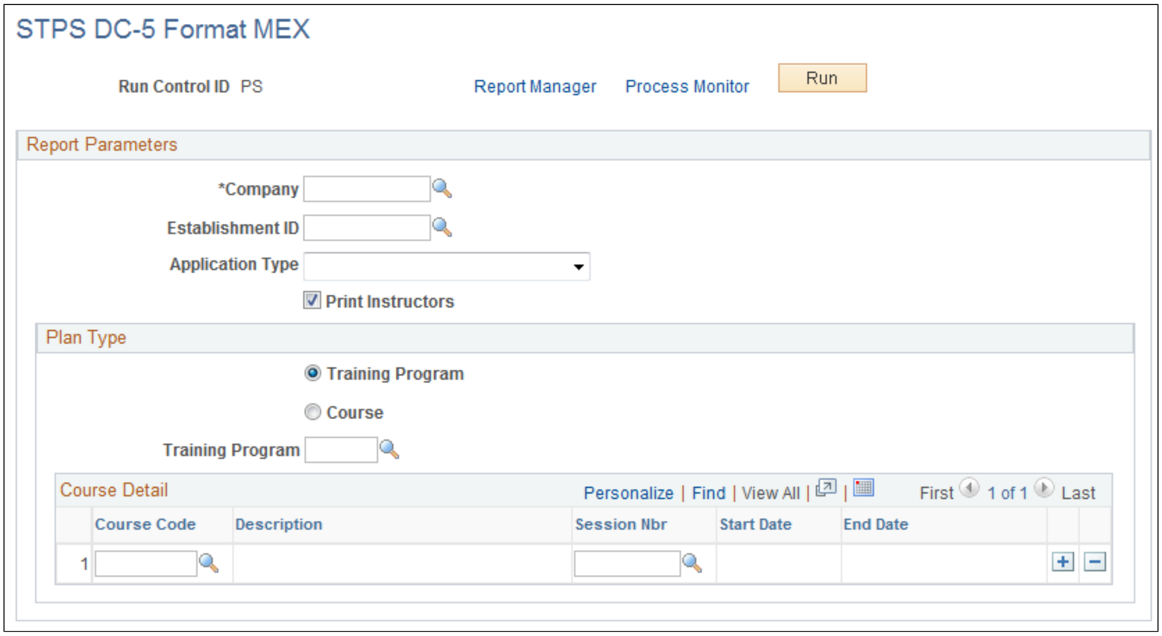
STPS DC-5 Format MEX Page

Use the STPS DC-5 Format MEX page (RUNCTL_STP008) to run the Training and Development External Registration Application MXSTP008 (format) and MXSTP009 (reverse) reports.

Navigation:

Administer Training > **Training Reports** > **STPS DC-5 Format MEX** > **STPS DC-5 Format MEX**

This example illustrates the fields and controls on the STPS DC-5 Format MEX page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Application Type	Values are *Initial, Instructor Change, New Programs,* and *Update Courses.*
Print Instructors	Select to include instructor names on the report.