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# PeopleSoft HCM 9.2: Human Resources Administer Training

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March 2013

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# Preface

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## 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.

### PeopleSoft Hosted Documentation

You access the PeopleSoft Online Help on Oracle's PeopleSoft Hosted Documentation website, which enables you to access the full help website and context-sensitive help directly from an Oracle hosted server. The hosted documentation 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, because that documentation is now incorporated into the hosted website content. The Hosted Documentation website is available in English only.

### Locally Installed Help

If your organization has firewall restrictions that prevent you from using the Hosted Documentation website, you can install the PeopleSoft Online Help locally. If you install the help locally, you have more control over which documents users can access and you can include links to your organization's custom documentation on help pages.

In addition, if you locally install the PeopleSoft Online Help, you can use any search engine for full-text searching. Your installation documentation includes instructions about how to set up Oracle Secure Enterprise Search for full-text searching.

See *PeopleTools 8.53 Installation* for your database platform, "Installing PeopleSoft Online Help." If you do not use Secure Enterprise Search, see the documentation for your chosen search engine.

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**Note:** Before users can access the search engine on a locally installed help website, you must enable the Search portlet and link. Click the Help link on any page in the PeopleSoft Online Help for instructions.

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### Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format. 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 lines 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 line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: PeopleSoft 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.

<i><b>Typographical Convention</b></i>	<i><b>Description</b></i>
<b>Bold</b>	Highlights PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Highlights field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply.  Italics also highlight references to words or letters, as in the following example: Enter the letter <i>O</i> .
Key+Key	Indicates a key combination action. For example, a plus sign ( + ) between keys means that you must hold down the first key while you press the second key. For Alt+W, hold down the Alt key while you press the W key.
Monospace font	Highlights a PeopleCode program or other code example.
... (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.

<b><i>Typographical Convention</i></b>	<b><i>Description</i></b>
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (   ).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.  Ampersands also precede all PeopleCode variables.
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

## ISO Country and Currency Codes

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

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

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

## Region and Industry Identifiers

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

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

### Region Identifiers

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

- Asia Pacific
- Europe
- Latin America

- North America

## Industry Identifiers

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

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

## Access to Oracle Support

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

## Documentation Accessibility

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

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## Using and Managing the PeopleSoft Online Help

Click the Help link in the universal navigation header of any page in the PeopleSoft Online Help to see information on the following topics:

- What's new in the PeopleSoft Online Help.
- PeopleSoft Online Help accessibility.
- Accessing, navigating, and searching the PeopleSoft Online Help.
- Managing a locally installed PeopleSoft Online Help website.

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## PeopleSoft HCM Related Links

[PeopleSoft Information Portal on Oracle.com](#)

[My Oracle Support](#)

[PeopleSoft Training from Oracle University](#)

[PeopleSoft Video Feature Overviews on YouTube](#)

[HCM Abbreviations](#)



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## Contact Us

Send us your suggestions Please include release numbers for the PeopleTools and applications that you are using.

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## Chapter 1

# Getting Started with Administer Training

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## 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.

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## 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.

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## 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.

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

### Related Links

*PeopleSoft HCM 9.2: Application Fundamentals*

*PeopleSoft 9.2: Enterprise Components*



## Chapter 2

# Defining Training Courses and Programs

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## 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 HCM 9.2: Human Resources Manage Profiles*)"

"Understanding Profile Management (*PeopleSoft HCM 9.2: 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.

These topics discuss how to:

- Enter basic vendor information.
- Enter vendor addresses and cost information.
- Enter vendor contact details.
- Enter vendor contact addresses.

## Pages Used to Set Up Vendors and Vendor Contacts

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

### Image: Vendor Profile 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.

Vendor Profile | Address

Vendor ID HXSXY

\*Description Sky Trainers Short Desc Sky Traine

\*Vendor Type Consulting Firm

Accounts Payable Vendor ID

Spain

Fiscal Code

Telephone

### Image: Vendor Profile 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.

France

Financing Type

Provider referenced by

Link to Centre Info (OPCA)

Certification

☒ Certified

Date

Number

Specialty

Agreement

Find | View All First 1 of 1 Last

\*Agrmt Date

\*Co

\*Agreement Type

\*Agreement Nbr

USA

☐ Minority Owned

### 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.

---

## (ESP) Spain

**Fiscal Code**

**Telephone**

## (FRA) France

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

**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

**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.

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

## (USA) USA

<b>Minority Owned</b>	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

### Image: Vendors - Address page

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

### 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](#)

"Administering Country Codes (*PeopleSoft HCM 9.2: 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

### Image: Vendor Contact Phone page

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

### 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

### Image: Vendor Contact Address page

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.

#### 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.

These topics discuss how to:

- Identify equipment and materials.
- Enter training facility addresses.
- Enter contact and equipment information.
- Track training room information.

- Enter training facility directions.

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

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Equipment and Materials	TRN_EQUIP_TABLE	Administer Training, Define Training Resources, Equipment and Materials, Equipment and Materials	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.
Training Facilities - Address	TRN_FACILITY_TBL1	Administer Training, Define Training Resources, Training Facilities, Address	Record the address of each training facility that your organization uses.
Contacts and Equipment	TRN_FACILITY_TBL2	Administer Training, Define Training Resources, Training Facilities, Contacts and Equipment	Enter the contact name and telephone number for the training facility and list the available equipment.
Training Facilities - Training Rooms	TRN_FACILITY_TBL4	Administer Training, Define Training Resources, Training Facilities, Training Rooms	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	TRN_FACILITY_TBL3	Administer Training, Define Training Resources, Training Facilities, Directions	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

### Image: Equipment and Materials page

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.

The screenshot shows a web form titled "Equipment and Materials". It contains the following fields and controls:

- Equipment/Materials Code**: K001
- \*Equipment Type**: A dropdown menu with "Overhead Projector" selected.
- \*Description**: A text input field containing "Overhead Projector".
- Short Description**: A text input field containing "OHP".
- Publications**: A section header with a light blue background.
- Author**: A text input field.
- Year Published**: A text input field.
- ISBN**: A text input field.

### Equipment Type

Select from the available options.

## Publications

**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

### Image: Training Facilities - Address page

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.

The screenshot shows the 'Training Facilities - Address' page. At the top, there are four tabs: 'Address' (which is active), 'Contacts and Equipment', 'Training Rooms', and 'Directions'. Below the tabs, the form is organized as follows:

- Training Facility:** HLC001
- Business Unit:** USSVC (with a magnifying glass icon)
- Location Code:** (empty text box with a magnifying glass icon)
- \*Facility Name:** Hospital Training Centre
- Short Desc:** Hospital
- Mail Drop ID:** (empty text box)
- Country:** USA (with a magnifying glass icon) and United States
- Address:** 1234 Broken Arrow Lane, Paynesville, CA 94223
- Edit Address:** (orange button)

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

### Business Unit

Select the business unit that is linked to the training facility.

### 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

### Image: Contacts and Equipment page

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.

The screenshot shows the 'Contacts and Equipment' page. At the top, there are four tabs: 'Address', 'Contacts and Equipment' (selected), 'Training Rooms', and 'Directions'. Below the tabs, the following information is displayed:

- Training Facility: HLC001 Hospital Training Centre
- Business Unit: USSVC
- Location: (empty field)
- Contact Name: (empty text box)
- Vendor ID: (empty text box with a search icon)

Below this information are two sections:

- Contact Phone Numbers:** This section has a table with two columns: '\*Phone Type' (a dropdown menu) and 'Phone' (a text box). There are 'Find', 'View All', 'First', '1 of 1', and 'Last' controls at the top right of this section.
- Equipment/Materials Available:** This section has a table with five columns: '\*Equipment/Materials Code' (a text box with a search icon), 'Qty' (a text box with the value '1'), 'Per Unit Cost' (a text box with the value '\$0.00'), 'Currency' (a dropdown menu with 'USD' selected), and 'Cost Unit' (a dropdown menu). There are 'Find', 'View All', 'First', '1 of 1', and 'Last' controls at the top right of this section.

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

### 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

#### 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.

#### 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

**Image: Training Facilities - Training Rooms page**

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.

The screenshot shows the 'Training Rooms' tab selected in the 'Training Facilities' page. The form displays details for a training room at 'Hospital Training Centre' (HLC001) under 'USSVC' business unit. The room is 'ROOM1' (H204) on floor 2, building H. It has a per unit cost of \$0.00, currency USD, and a maximum of 25 students. The 'Room Active' checkbox is checked. Below this, the 'Fixed Equipment/Materials' section shows a single entry with an empty equipment code and a quantity of 1.

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

## Training Rooms

<b>Room Code</b>	Each room in a training facility must have a unique room code.
<b>Building Nbr and Floor Nbr (building number and floor number)</b>	Enter the room name, the name or number of the building in which the room is located, and the floor number.
<b>Per Unit Cost</b>	Enter a per unit cost for the room.
<b>Cost Unit</b>	Select the cost unit that is associated with the per unit cost.
<b>Maximum Nbr of Students (maximum number of students)</b>	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.
<b>Room Active</b>	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.
<b>Fixed Equipment/Materials</b>	
<b>Equip Code and Quantity (equipment code and quantity)</b>	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

### Image: Training Facilities - Directions page

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.

The screenshot shows a web application interface for defining training facilities. It features a horizontal tab bar at the top with four tabs: 'Address', 'Contacts and Equipment', 'Training Rooms', and 'Directions'. The 'Directions' tab is currently selected and highlighted. Below the tabs, the page displays information for a specific training facility: 'Training Facility HLC001 Hospital Training Centre' and 'Business Unit USSVC'. Under the 'Description' label, there is a large, empty text area for entering directions. A small icon is visible in the top right corner of this text area.

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](#)

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## 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.

These topics discuss how to:

- Add instructors.
- Define courses that an instructor is qualified to teach.
- View instructor competencies.
- View instructor accomplishments.

## Pages Used to Set Up Instructors

<i><b>Page Name</b></i>	<i><b>Definition Name</b></i>	<i><b>Navigation</b></i>	<i><b>Usage</b></i>
Instructors - Instructor Profile	TRN_INSTRUCTR_TBL1	Administer Training, Define Training Resources, Instructors, Instructor Profile	Add an instructor to the Instructor table.
Instructors - Qualification	TRN_INSTRUCTR_TBL2	Administer Training, Define Training Resources, Instructors, Qualification	Define the courses that an instructor is qualified to teach.
Matching Competencies	TRN_MTCH_CMPS_SEC	Click the Matching Competencies link on the Qualification page.	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	TRN_MTCH_ACPS_SEC	Click the Matching Accomplishments link on the Qualification page.	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

### Image: Instructors - Instructor Profile page

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.

The screenshot displays the 'Instructor Profile' page. At the top, there are tabs for 'Instructor Profile' and 'Qualification'. Below the tabs, the 'Instructor ID' is 'HXATEE001' and the name is 'Joe Boxer'. The 'Instructor Details' section includes a search bar with 'Find | View All' and pagination 'First 1 of 1 Last'. Fields include:
 

- \*Effective Date: 11/19/2003
- \*Status: Active
- \*Internal/External: Internal
- Vendor ID: (empty)
- School Code: (empty)
- School Name: (empty)
- Per Unit Cost: \$0.00
- Cost Unit: Pers/Day
- Area of Expertise: (empty)
- Description: (empty)

 Below these fields are tabs for 'Mexico' and 'France'. Under 'Mexico', there is an 'Instructor RFC' field. Under 'France', there is an 'Empl Record' field with a value of '0' and a 'Full-Time Instructor' checkbox.

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

See "Adding a Person (*PeopleSoft HCM 9.2: Human Resources Administer Workforce*)".

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

#### 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**

**Instructor RFC**

Enter the RFC for the instructor.

**(FRA) France**

**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

### Image: Instructors - Qualification page

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.

The screenshot shows the 'Instructor Profile' and 'Qualification' tabs. Under the 'Qualification' tab, the instructor is identified as 'Instructor HXATEE001 Joe Boxer'. Below this is a section titled 'Courses Qualified to Teach' with a search bar containing '\*Course Code' and 'HXAT00' (New Hire Orientation). To the right of the search bar are navigation controls: 'Find | View All', 'First', '1 of 5', and 'Last'. Below the search bar are two side-by-side boxes: 'Competencies Match Analysis' and 'Accomplishments Match Analysis'. Each box displays '0 out of 0' and a link to 'Matching Competencies' or 'Matching Accomplishments' respectively.

**Note:** Complete this page after you define courses.

## Courses Qualified to Teach

### 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*.

### 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*.

## 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.

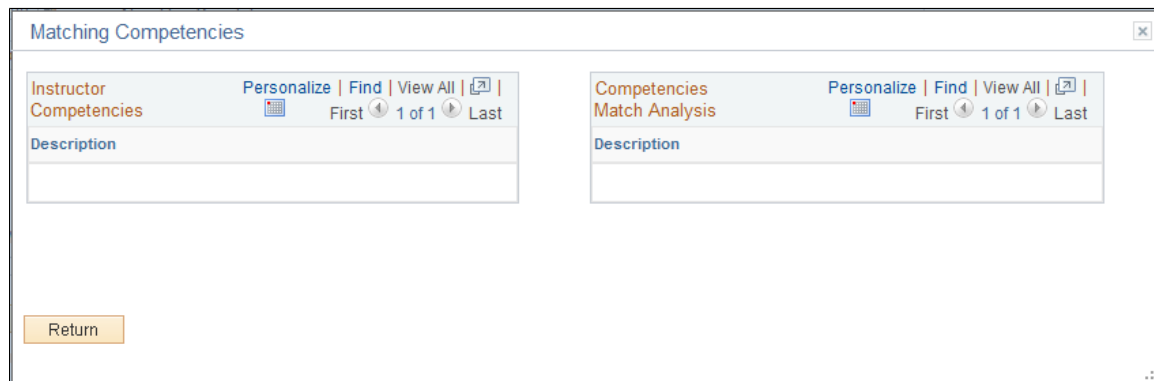
This page helps you determine the instructor's suitability to teach the course.

### Navigation

Click the Matching Competencies link on the Qualification page.

### Image: Matching Competencies 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 HCM 9.2: 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.

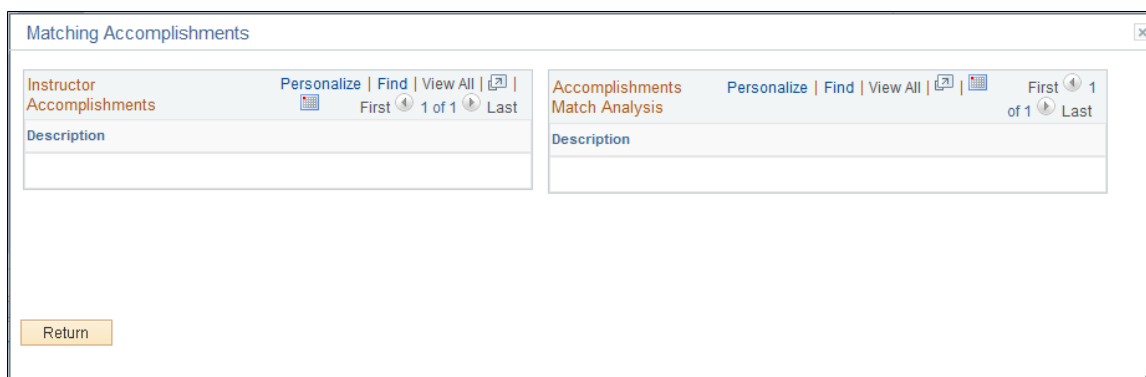
This page helps you determine the instructor's suitability to teach the course.

## Navigation

Click the Matching Accomplishments link on the Qualification page.

## Image: Matching Accomplishments 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 HCM 9.2: 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

<b>Category</b>	<b>Subcategory</b>	<b>Course Name</b>	<b>Catalog Status</b>
Human Resources	Technical	PeopleTools 2	Active
Human Resources	Administrative	Supervisory Skills	Active
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 Catalog 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 Catalog Costs component one at a time.

## Page Used to Set Up Course Categories

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Category/Subcategory	TRN_CATEGORY_TABLE	Set Up HCM, Product Related, Enterprise Learning, Category/Subcategory, Category/Subcategory	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

### Image: Category/Subcategory page

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.

**Category/Subcategory**

Category Code COMMUNICTN

\*Description Communication

Short Description Communicatn

**Category Table** Personalize | Find | View All | First 1-4 of 4 Last

*Subcategory Code	*Description	Short Description		
AWARENESS	Awareness Communications	Awareness	+	-
INTERPRSNL	Interpersonal Relations	Interprsnl	+	-
PROFESSNL	Professional Communications	Professnl	+	-
UNKNOWN	Unknown	Unknown	+	-

## 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

To set up courses, use the Courses (COURSE\_TABLE2) component.

These topics discuss how to:

- Define general course information.
- Define instructor competencies and accomplishments.

- Designate course prerequisites.
- Define equipment and materials required for a course.
- Specify course classification.
- Specify course content, target audience, and agenda.

To view a list of defined courses, generate the Course Table report.

## Pages Used to Set Up Training Courses

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Courses - Course Profile	COURSE_TABLE1_GBL	Set Up HCM, Product Related, Enterprise Learning, Courses, Course Profile	Define general course information.
Courses - Required Instr Comps/Accomps (courses required instructor competencies / accomplishments)	COURSE_TABLE6	Set Up HCM, Product Related, Enterprise Learning, Courses, Required Instr Comps/Accomps	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.
Prereqs,Goals (prerequisites, Goals)	COURSE_TABLE2	Set Up HCM, Product Related, Enterprise Learning, Courses, Prereqs,Goals	Specify the courses that a student must complete before taking this course, as well as target skills and certifications.
Courses - Equipment	COURSE_TABLE3	Set Up HCM, Product Related, Enterprise Learning, Courses, Equipment	Define required equipment and materials. Add this information only for in-house courses.
Courses - Catalog	COURSE_TABLE4	Set Up HCM, Product Related, Enterprise Learning, Courses, Catalog	Specify how courses are classified in the catalog.
Courses - Description	COURSE_TABLE5	Set Up HCM, Product Related, Enterprise Learning, Courses, Description	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

### Image: Courses - Course Profile page

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.

#### 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.

#### 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.

---

	<p><b>Note:</b> 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.</p>
<b>Course Type</b>	<p>Use this field to categorize the courses. It doesn't affect the way that you administer the course in Human Resources.</p> <p>Select from:</p> <p><i>Contin Ed:</i> Continuing education.</p> <p><i>Comp check:</i> Competency check.</p> <p><i>Functional</i></p> <p><i>Mgmt Devel:</i> Management development.</p> <p><i>Skill Dev:</i> Skill development.</p> <p><i>Supv Skill:</i> Supervisory skills.</p> <p><i>Technical</i></p>
<b>Multilingual Course</b>	<p>Select if the course is offered in multiple languages. This check box is available if you selected Session Administration.</p>
<b>Primary Delivery Method</b>	<p>Select from:</p> <p><i>Audio:</i> For audio training, such as language tapes.</p> <p><i>Computer:</i> For computer-based training.</p> <p><i>Instructor :</i> For instructor-led courses.</p> <p><i>On-the-Job:</i> For on-the-job training.</p> <p><i>Video:</i> For video-based training.</p> <p><i>Workbook:</i> For self-taught courses with workbooks.</p>
<b>Instructor Comps/Accomps Req (instructor competencies/ accomplishments required)</b>	<p>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 <i>Instructor</i>. Selecting this check box makes the Required Instr Comps/Accomps page available.</p>
<b>Min/Max Students (minimum/ maximum students)</b>	<p>Enter the minimum and maximum number of students that can enroll in the course.</p>
<b>Duration Time</b>	<p>Enter the duration of the course.</p>
<b>Cost Unit</b>	<p>If you completed the Duration Time field, select the unit in which duration time is measured.</p>



<b>Course Units</b>	Enter the number of course units for external courses.
<b>Course Offering</b>	Indicate how often the course is offered.
<b>School Code/School</b>	<p>This field is not available for internal courses.</p> <p>For external courses, enter details of the school in the School Code or School field.</p> <p>If the school doesn't have a code, leave the School Code field blank and enter the school name in the School field.</p>

## (FRA) France

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

<b>Chargeable</b>	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.
<b>Chargeable Percent</b>	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.
<b>EDDF Course</b>	Select if this course is eligible for funding under the <i>Engagement De Développement de la Formation</i> (EDDF). Costs related to EDDF courses appear on the 2483 report in Group C – Line 7.
<b>Eligible to DIF</b>	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

### Image: Courses - Required Instr Comps/Accomps page

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.

The screenshot displays the 'Required Instr Comps/Accomps' page. At the top, there are navigation tabs: 'Course Profile', 'Required Instr Comps/Accomps' (which is the active tab), 'Prereqs,Goals', 'Equipment', 'Catalog', and 'Description'. Below the tabs, the page shows 'Course 2SESS' with '2 Sessions' and 'Status Active'. The main content area is divided into two sections: 'Instructor Competencies' and 'Instructor Accomplishments'. Each section has a 'Find' button, a 'View All' link, and pagination controls (First, 1 of 1, Last). Below each section header is a table with a single column for the respective field name and a '+' button to add new entries.

**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 HCM 9.2: 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

### Image: Prereqs,Goals page

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.

The screenshot shows the 'Prereqs,Goals' tab selected in a navigation bar. Below the tab, the course details are 'Course 2SESS 2 Sessions' and 'Status Active'. The page is divided into four main sections, each with a 'Find' button and navigation controls (First, 1 of 1, Last):

- Prerequisite Courses:** Contains a search input field with a magnifying glass icon and '+ -' buttons.
- Target Competencies:** Contains a 'Competency' search field, a '\*Proficiency' dropdown, and a 'Grant to Empl after Course' checkbox (checked). It includes '+ -' buttons.
- Target Accomplishments:** Contains a '\*License/Certification Code' search field and a 'Grant to Empl after Course' checkbox (checked). It includes '+ -' buttons.
- Target Languages:** Contains a '\*Language' search field, and three dropdowns for 'Speak', 'Read', and 'Write'. It also has a 'Grant to Empl after Course' checkbox (checked) and '+ -' buttons.

## 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

### 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*.

### 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

### 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

### 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 HCM 9.2: 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

### Image: Courses - Equipment page

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

### Image: Courses - Catalog page

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.

### 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.

### 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

### Image: Courses - Description page

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.

#### 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 Catalog Organization (TRN\_CATALOG\_MOVE) component.

This topic discusses how to examine and adjust the category and subcategory organizational structure of the catalog. You add courses to the catalog through the Courses - Catalog page.

## Page Used to Organize the Course Catalog

Page Name	Definition Name	Navigation	Usage
Catalog Organization	TRN_CATALOG_MOVE	Set Up HCM, Product Related, Enterprise Learning, Catalog Organization, Catalog Organization	View courses that are associated with a selected category and subcategory. Reorganize the training catalog by moving courses between categories or subcategories.

## Catalog Organization Page

Use the Catalog Organization 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, Enterprise Learning, Catalog Organization, Catalog Organization

### Image: Catalog Organization page

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

The screenshot displays the 'Catalog Organization' interface. It features two side-by-side panels. Each panel has a header with 'Course Code' and a sub-header with 'Find | View All | First | 1 of 1 | Last'. Below the headers, each panel lists a course: 'K004 Gender Communication' on the left and 'K005 Professional Presentations' on the right. Above each panel, there are input fields for 'Category Code' (both set to 'COMMUNICTN') and 'Subcategory Code' (left set to 'AWARENESS', right set to 'PROFESSNL'). Between the two panels, there are four orange buttons: '<<', '>>', 'First', and 'Last'.

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.

This topic discusses how to create training programs.

## Page Used to Set Up Programs

Page Name	Definition Name	Navigation	Usage
Program Information	TRN_PROGRAM_TABLE	Set Up HCM, Product Related, Enterprise Learning, Program Information, Program Information	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

### Image: Program Information page

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.

### Program Information

**Program Code** HREXEC  
**\*Program Status** Active  
**\*Description** HR Executive Development **Short Title** HR Exec  
**Creation Date** 01/01/1990 **Revision Date**  
**Business Unit** PDEV **Owning Dept ID** 10200  
**Comment** This training program is intended to further enhance the management skills of the managers and senior managers in Human Resources

Training Program				Personalize	Find	View All	First	1-3 of 3	Last
Sequence	*Course Code	Description	Required						
1	3001		<input type="checkbox"/>						
2	G100		<input type="checkbox"/>						
3	2001		<input checked="" type="checkbox"/>						

### Program Status

Select *Active* (the default), *Inactive*, or *Proposed*.

### Short Title

Enter an abbreviated description of the training program.

<b>Creation Date</b>	The default is the system date (usually today's date).
<b>Revision Date</b>	If you update the program later, enter that date.
<b>Business Unit</b>	Select the business unit that you want to associate with this training program.
<b>Owning Dept ID (owning department ID)</b>	Based on the business unit that you selected, select the department that is responsible for maintaining the training program.

## Training Program

<b>Sequence</b>	<p>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.</p> <p>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.</p>
<b>Course Code</b>	Select a code for each course in the training program.
<b>Required</b>	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

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Non-Course Training	CM_NON_CRSE_TABLE	Set Up HCM, Product Related, Enterprise Learning, Non-Course Training, Non-Course Training	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

### Image: Non-Course Training page

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.

**Non-Course Training**

Training ID KU0001

\*Description Alcohol&Drug Testing Awarencss

Short Description A&DT Awr

\*Media Type Seminar

Description This half-day seminar delivers insightful tips to employees and supervisors on how to recognize when reasonable suspicion testing should be conducted.

**Target Competencies** Personalize | Find | First 1 of 1 Last

*Competency	Description
1120	Drug & Alcohol Awareness

## (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

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Course Category	RUNCTL_TRN024	Administer Training, Course Reports, Course Category, Course Category	Run the Course Category report (TRN024), which lists training catalog course categories. This is a Crystal report.
Course Description	RUNCTL_TRN023	Administer Training, Course Reports, Course Description, Course Description	Run the Course Description report (TRN023), which lists course descriptions. This is a Crystal report.
Course Equipment	RUNCTL_TRN025	Administer Training, Course Reports, Course Equipment, Course Equipment	Run the Course Equipment report (TRN025), which lists the equipment needed for a course. This is a Crystal report.
Courses - Run Control	PRCSRUNCNTL	Administer Training, Course Reports, Courses, Run Control	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. This is a Crystal report.
Course Vendors	RUNCTL_TRN026	Administer Training, Course Reports, Course Vendors, Course Vendors	Run the Course Vendors report (TRN026), which lists vendors that are associated with a course on the Course table. This is a Crystal report.
Prerequisite Courses	RUNCTL_TRN027	Administer Training, Course Reports, Prerequisite Courses, Prerequisite Courses	Run the Prerequisites Course report (TRN027), which lists prerequisite courses for a course. This is a Crystal report.
Target Course Certifications	RUNCTL_TRN016	Administer Training, Course Reports, Target Course Certifications, Target Course Certifications	Run the Target Course Certifications report (TRN016), which lists the licenses and certifications that students receive on successful completion of a course. This is a Crystal report.
Target Qualifications	RUNCTL_TRN028	Administer Training, Course Reports, Target Qualifications, Target Qualifications	Run the Target Qualifications report (TRN028), which lists the competencies that the course aims to develop or improve. This is a Crystal report.

## Chapter 3

# Setting Up Training Costs

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## Understanding Training Costs

These topics provide an overview of:

- Training cost and budget setup.
- Training currencies.

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**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.

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**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 Period 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:

<b>Nature of Cost</b>	<b>Process Status</b>	<b>Currency Used for Costs</b>
Budget training plan level	Overall training plan cost summary for specified budget period.	Currency that is defined in the Budget Period 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.

<b>Cost Type</b>	<b>Currency</b>
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](#)

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## 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

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Base Currency	TRN_BASE_CURRENCY	Set Up HCM, Product Related, Enterprise Learning, Base Currency, Base Currency	Specify the base currency to use to track all cost amounts.

### Base Currency Page

Use the Base Currency page (TRN\_BASE\_CURRENCY) to specify the base currency to use to track all cost amounts.

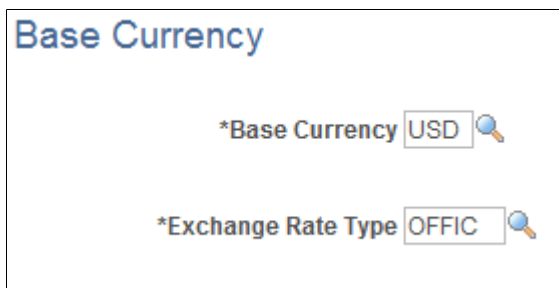


## Navigation

Set Up HCM, Product Related, Enterprise Learning, Base Currency, Base Currency

### Image: Base Currency page

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



The screenshot shows a web page titled "Base Currency". It contains two input fields. The first field is labeled "\*Base Currency" and contains the text "USD". The second field is labeled "\*Exchange Rate Type" and contains the text "OFFIC". Both fields have a magnifying glass icon to their right, indicating a search or selection function.

---

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

---

#### 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 (*PeopleSoft HCM 9.2: 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 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

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
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

### Image: Cost Unit page

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.

The screenshot shows the 'Cost Unit' page with the following fields and values:

- Cost Unit D**: (Header)
- \*Description**: Day
- Short Description**: Day
- \*Cost Unit Type**: Time (dropdown menu)
- Duration Label**: Day
- Factor to Convert to Annuity**: 240.000000

**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  $200 / (1920/12) * 10 = 200/160 * 10$ .

### 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.

**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.

---



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## Defining Default Training Costs

To set up default training costs, use the Catalog 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.

### Catalog 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.

---

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**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

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Catalog Costs - Vendor, Facility, Equipment	TRN_COSTC_TBL1_GBL	Set Up HCM, Product Related, Enterprise Learning, Catalog 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.
Catalog Costs - Instructor, Expense	TRN_COSTC_TBL2_GBL	Set Up HCM, Product Related, Enterprise Learning, Catalog 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	TRN_CATLG_CRSE_SEC	Click the Default Costs button on the Catalog Costs - Vendor, Facility, Equipment page or the Course Costs - Vendor, Facility, Equipment page.	Select the source of default costs.
Course Costs - Vendor, Facility, Equipment	TRN_COST_TBL1_GBL	Set Up HCM, Product Related, Enterprise Learning, Course Costs, Vendor, Facility, Equipment	Define the cost of courses in a training catalog. These costs may be the same as the costs associated with the category or subcategory to which the course belongs.
Course Costs - Instructor, Expense	TRN_COST_TBL2_GBL	Set Up HCM, Product Related, Enterprise Learning, Course Costs, Instructor, Expense	Enter default instructor costs and other expenses that are associated with courses in a selected category or subcategory.

## Catalog Costs - Vendor, Facility, Equipment Page

Use the Catalog 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, Enterprise Learning, Catalog Costs, Vendor, Facility, Equipment

### Image: Catalog Costs - Vendor, Facility, Equipment page

This example illustrates the fields and controls on the Catalog 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 Catalog Costs - Vendor, Facility, Equipment page.

### 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.

#### 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****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.

**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****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.

**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 Catalog Costs - Vendor, Facility, Equipment page or the Course Costs - Vendor, Facility, Equipment page.

### 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.

## Catalog Costs - Instructor, Expense Page

Use the Catalog 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, Enterprise Learning, Catalog Costs, Instructor, Expense

### Image: Catalog Costs - Instructor, Expense page

This example illustrates the fields and controls on the Catalog 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 Catalog Costs - Instructor, Expense page.

## Instructor

### 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.
<b>Instructor ID and Name</b>	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.
<b>Per Unit Cost</b>	This value is automatically populated from the Instructor table. You can override the default cost.
<b>Duration</b>	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.
<b>From Course</b>	This check box is automatically selected to show that the Duration field is populated from the Course table.
<b>Expense</b>	
<b>Expense Type</b>	Select the expense type.
<b>Quantity</b>	Enter the quantity of the item that is specified in the Expense Type field.
<b>Per Unit Cost</b>	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 an 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:

<i><b>Page Name</b></i>	<i><b>Default Comes From</b></i>
Job Code Salary Cost	No default.
Trainees Salary Costs	Job Code Salary Cost page.
Employee Demand	<ol style="list-style-type: none"> <li>1. Trainees Salary Costs page, when defined.</li> <li>2. Otherwise Job Code Salary Cost page (with employee's job code).</li> <li>3. Otherwise default values are set to blank.</li> </ol>
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

<i><b>Page Name</b></i>	<i><b>Definition Name</b></i>	<i><b>Navigation</b></i>	<i><b>Usage</b></i>
Job Code Salary Costs	TRN_JOB_SLR_COST	Set Up HCM, Product Related, Enterprise Learning, Job Code Salary Costs, Job Code Salary Costs	Identify the compensation cost of having an employee in this job code in training.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Trainees Salary Costs	TRN_EE_SALARY_COST	Set Up HCM, Product Related, Enterprise Learning, Trainees Salary Costs, Trainees Salary Costs	Identify the cost of having an employee in training.
Update Salary Costs	RUNCTL_TRN006	Administer Training, Define Budget, Update Salary Costs, Update Salary Costs	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

### Image: Job Code Salary Costs page

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.

### 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

### Image: Trainees Salary Costs page

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.

The screenshot shows the 'Trainees Salary Costs' page for employee Jean-Claude Breton (Empl ID: KF0009). The page includes tabs for Training Cost Details, Cost, Job, Period, Training Allocation, and FEET. The Training Cost Details tab is active, displaying a table with the following data:

*Training Type	*Effective Date	*Status	Gross Salary	Train Full Time Gross Salary	*Currency	*Cost Unit	Paid Hours
Budget Training	02/08/2013	Active	\$0.00	0.000	USD	Pers/Month	0.00

## Common Page Information

### 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

**Job Code** Displays the employee's job code from the Job Data table.

## Period tab

**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

### Image: Update Salary Costs page

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.

#### 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

<b>Apply on Jobcodes</b>	Select to apply the cost to employees with a specified job code.
<b>Apply on Employees</b>	Select to apply the cost to given employees.
<b>(FRA) Load from Global Payroll</b>	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 HCM 9.2: Global Payroll for France*)" and "Paid Vacation Accruals Calculations (*PeopleSoft HCM 9.2: Global Payroll for France*)".

## Calendar Selection Criteria

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

<b>Period Begin Date</b>	Select the period begin date for salary training costs, usually the beginning of the fiscal year.
<b>Period End Date</b>	Select the period end date for salary training costs, usually the end of the fiscal year.
<b>Period End Date and Payment Date</b>	Select the date that "Accruals ( <i>PeopleSoft HCM 9.2: Global Payroll for France</i> )" signifies the end of the period.
<b>Refresh</b>	Click to have the system insert all payroll calendars that occur within the specified period into the Calendar Process List

## Calendar Process List

<b>Calendar ID</b>	Select a Calendar ID that defines the time range in which salary costs are being defined.
<b>Period ID</b>	The system enters a Period ID for the salary costs being calculated during this time range.



See *PeopleTools: PeopleSoft Process Scheduler*.

## Related Links

*PeopleSoft HCM 9.2: Global Payroll*

*PeopleSoft HCM 9.2: Global Payroll for France*

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## Defining Training Budget Periods and Department Allocations

To define budget periods, use the Budget Period 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

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Budget Period	BUDGET_PERIOD_TBL	Administer Training, Define Budget, Budget Period, Budget Period	Define budget periods.
Department Budget	TRN_BUDGET_TBL	Administer Training, Define Budget, Department Budget, Department Budget	Define the amount that is allocated to departments in your organization for training in a specified budget period.

## Budget Period Page

Use the Budget Period page (BUDGET\_PERIOD\_TBL) to define budget periods.

## Navigation

Administer Training, Define Budget, Budget Period, Budget Period

### Image: Budget Period page

This example illustrates the fields and controls on the Budget Period 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.

**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

### 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.

### (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 Changeмент*, *Job Preservation*, and *Not Specified*.

## Related Links

[Selecting the Base Currency for Training Costs](#)

"Defining Business Units (*PeopleSoft HCM 9.2: 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

### Image: Department Budget page

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.

<b>Budget Period</b>	KF002	<b>Business Unit</b>	FRA01	France Business Unit
<b>Department</b>	15000	<b>Hotline</b>	Bordeaux	
<b>*Description</b>	Budget 2002			
<b>Short Description</b>	Budget 200			
<b>Allocation Date</b>	12/01/2001			
<b>Originating Emplid</b>	KF0001		Maurice Berger	
<b>Budget Amount</b>	45734.71		<b>Currency</b>	EUR

**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

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## 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

<b>Creation Date</b>	If you're creating a new department demand, enter the creation date. The default is the system date, which you can change.
<b>Demand ID</b>	The system displays <i>NEW</i> 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.
<b>Demand Priority</b>	Values are <i>Low</i> , <i>Medium</i> , and <i>High</i> . When you're building global scenarios using the Create Global Scenario processes, you can specify that the system include only demands that have a certain demand priority.  See <a href="#">Creating Global Scenarios</a> .
<b>Expiration Date</b>	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.
<b>From Date and Thru Date</b>	Displays the beginning (from) and ending (through) dates of the budget period, which you entered when you opened the page.
<b>Frozen</b>	Automatically selected if the budget period is frozen. If you try to modify this page, you get a warning message.
<b>OrigEmplID (originating employee ID)</b>	Select the employee ID of the person who created the demand.
<b>Originator</b>	Select the demand originator's position. Values are <i>Employee</i> and <i>Supervisor</i> .

**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:

<i><b>Demand Method</b></i>	<i><b>Purpose</b></i>
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:

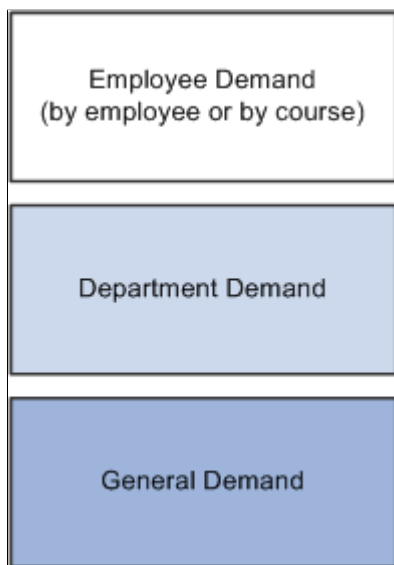
- Get complete training information, from the training needs of your entire organization to those of the individual employee.
- Establish only one type of demand or one of each type.

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.

**Image: General demand, department demand, and employee demand as layers of training needs**

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.

### Image: Example page using department tree to add departments to a demand profile

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

**Create Demand Profiles Directly**

Business Unit CAN01      Profile ID KCHR      Profile Creation Date 06/02/2000

\*Description

Short Description

**Department Information** Find | View All First 1-2 of 2 Last

Department ID	Department
<input type="text" value="10000"/>	Human Resources
<input type="text" value="14000"/>	Administration

**Job Code** Personalize | Find | View All First 1 of 1 Last

Job Code	Description
<input type="text" value="1"/>	



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.

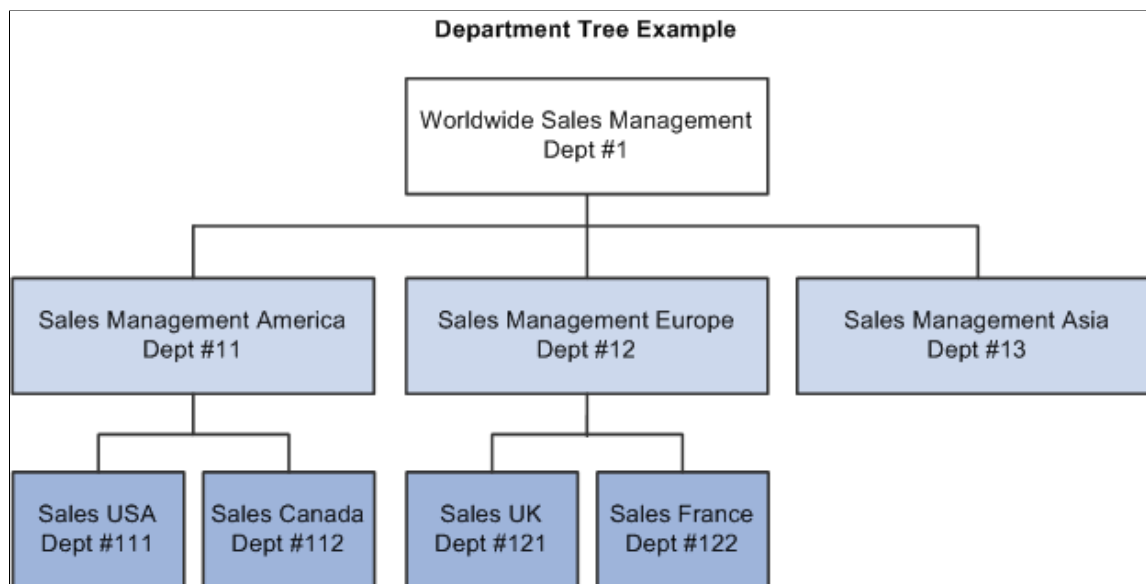
For example, when you establish the number of employees that need training for a course, and you want to specify a demand for your own department only, enter only your department number and the number of people who are to be trained. To train people in every department for which you are responsible, 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.

### Image: Example of an expanded department 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 (*PeopleSoft HCM 9.2: Application Fundamentals*)"

"Understanding Data Permission Security for HCM (*PeopleSoft HCM 9.2: Application Fundamentals*)"

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## 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

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Create Demand Profiles Directly	TRN_PROFILE_CREATE	Administer Training, Training Budget, Create Demand Profiles, Directly, Create Demand Profiles Directly	Create a dynamic profile based on a list of department and job codes.
Profile Criteria	TRN_PROFILE_TABLE	Administer Training, Training Budget, Create Demand Profiles, By Criteria, Profile Criteria	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	TRN_PROFILE_VIEW	Administer Training, Training Budget, Create Demand Profiles, By Criteria, Profile Selection	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	RUNCTL_TRN009	Administer Training, Training Budget, Create Demand Profiles, Create Delayed Profile, Create Delayed Profile	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

### Image: Create Demand Profile Directly page

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.

**Create Demand Profiles Directly**

Business Unit CAN01      Profile ID KCHR      Profile Creation Date 06/02/2000

\*Description

Short Description

**Department Information** Find | View All First 1-2 of 2 Last

Department ID <input type="text" value="10000"/>	Department Human Resources
Department ID <input type="text" value="14000"/>	Department Administration

**Job Code** Personalize | Find | View All | First 1 of 1 Last

Job Code	Description
1 <input type="text"/>	

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

**Department ID** Select the department to include in the training profile template.

### Job Code

**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

### Image: Profile Criteria page

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.

The screenshot displays the 'Profile Criteria' page with the following fields and controls:

- Business Unit:** CAN01
- Profile ID:** KCGBI
- Profile Creation Date:** 06/02/2000
- \*Description:** Canadian Global Business Inst
- Short Description:** CanGBI
- Delayed:** ☐
- Link with Competencies:** ☐
- Create Selection Criteria:** Find | View All First 1 of 1 Last
- \*Criteria Number:** 1
- Include Criteria:**
  - Department:** Find | View All First 1 of 1 Last
    - \*Department ID: 10000
    - Department: Human Resources
  - Job Code:** Find | View All First 1 of 1 Last
    - \*Job Code:
    - Description:
  - Competency:** Find | View All First 1 of 1 Last
    - \*Competency:
    - \*Level:
- Exclude Criteria:**
  - Department:** Find | View All First 1 of 1 Last
    - \*Department:
    - Department:
  - Job Code:** Find | View All First 1 of 1 Last
    - \*Job Code: 910005
    - Description: Trainee-Analyst
  - Competency:** Find | View All First 1 of 1 Last
    - \*Competency:
    - \*Level:

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.

**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.

**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****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 HCM 9.2: 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

### Image: Profile Selection page

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.

Department			Job Code		
Department ID	Department	Number of Employees	Job Code	Description	Number of Employees
		0			0

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.

### 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

#### 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

### 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

### Image: Create Delayed Profile page

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.

The screenshot shows the 'Create Delayed Profile' page. At the top, there's a title 'Create Delayed Profile' and a navigation bar with 'Run Control ID PS', 'Report Manager', 'Process Monitor', and a 'Run' button. Below the navigation bar is a 'Profile Details' section. It has a search bar and a table. The table has two columns: '\*Business Unit' and '\*Profile ID'. The '\*Profile ID' column contains a search icon and a list of profile IDs. The table is currently empty, showing '1 of 1' results.

### 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

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
General Demand	TRN_DEMAND_GNRL_1	Administer Training, Training Budget, Identify Training Demand, General Demand, General Demand	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 Period page.
General Demand - Training Population	TRN_DEMAND_GNRL_2	Administer Training, Training Budget, Identify Training Demand, General Demand, Training Population	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	TRN_PROF_TMPLT_SEC	Click the Use Profile as a Template link on the General Demand - Training Population page.	Specify the profile to use to populate the General Demand page.
Gender/Socio Prof Distribution	TRN_DPT_DMD_SEC	Click the department name link in the Demand section of the General Demand - Training Population page.	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 Period page.



Navigation

Administer Training, Training Budget, Identify Training Demand, General Demand, General Demand

Image: General Demand page

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.

General Demand

Training Population

Budget Period

K2000CALYR

Business Unit

CAN01

☐ Frozen

Demand ID

000009

From Date

01/01/2000

Thru Date

12/31/2000

Course Information

Category

MANAGEMENT

Subcategory Code

SUPERVISN

☐ Not in Catalog

Course Code

K006

Course Name

Conducting Performance Reviews

France

Training Plan Category

Demand Information

\*Description

Conducting Performance Reviews

Creation Date

06/01/2000

Short Description

Perf Rewvs

Revision Date

Originator

Supervisor

Originating Employee ID

Demand Priority

Medium

Expiration Date

Course Information

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

(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

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

### Image: General Demand - Training Population page

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.

The screenshot shows the 'General Demand - Training Population' page. It features a header with two tabs: 'General Demand' and 'Training Population'. The 'Training Population' tab is selected. Below the tabs, there are several fields and controls:

- Budget Period:** K2000CALYR
- Business Unit:** CAN01
- Demand ID:** 000009
- Description:** Conducting Performance Reviews
- Eff Date:** 01/01/2000
- Thru Date:** 12/31/2000
- Creation Date:** 06/01/2000
- Revision Date:**
- Frozen:** ☐
- Use Profile as a Template:** (link)
- Budgeted Training Cost:** 0.00
- \*Currency:** USD
- \*Unit:** Pers/Hour
- Compute:** (button)
- Job Code:** (search field)
- Find | View All:** (link)
- First | 1 of 1 | Last:** (navigation links)
- Department:** 10000
- Human Resources:** (label)
- Demand:** 5
- Totals:**
  - Total General Demand:** 5
  - Update:** (button)
  - Total Count:** 5

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.

### 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 Period 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

#### 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.

#### 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

### 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.

### Image: General Demand - Profile Template 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.

### 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.

### Image: Gender/Socio Prof Distribution 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.

The screenshot shows a web application window titled "Gender/Socio Prof Distribution". Inside the window, there is a dropdown menu with a French flag icon and the text "France". Below this, there is a section titled "Distribution by" with a dropdown menu showing "Gender". Under "Gender", there are two input fields: "Female" and "Male". Below these, there is another section titled "Socio Professional Category" with a dropdown menu showing "Executive", "Manager", "Office Worker", "Qualified Worker", and "Non Qualified Worker". Each of these categories has an associated input field. At the bottom of the window, there are two buttons: "OK" and "Cancel".

### (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

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Department Demand	TRN_DEMAND_DEPT	Administer Training, Training Budget, Identify Training Demand, Department Demand, Department Demand	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

### Image: Department Demand page

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.

**Department Demand**

Budget Period K2000CALYR Business Unit CAN01 ☐ Frozen  
 Department 10000 Department Human Resources

**Department Information** Find | View All First 1 of 1 Last

**Course Information** + -

Category MANAGEMENT Subcategory Code SUPERVISN ☐ Not in Catalog  
 Course Code K006 Course Name Conducting Performance Reviews  
 France  
 \*Training Plan Category Adaptation to Job Chngement

Demand ID 000009 Demand 5  
 Creation Date 06/01/2000 Revision Date  
 \*Description Conducting Performance Reviews Short Description Perf Rewvs  
 Originator Supervisor Originating Employee ID  
 Demand Priority Medium Expiration Date  
 Employee Cost 0.00 Currency USD Cost Unit Pers/Hour

**Job Code** Find | View All First 1 of 1 Last

Job Code Job Title

## 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.

### 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 Chngement, 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 Period 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****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

To define employee training demand, use the Employee Demand (TRN\_EE\_DEMAND) and the Employee Demand (TRN\_EE\_DEMAND\_CRSE) components. These topics discuss how to:

- Specify courses for an employee.
- Enter additional employee demand details.
- Specify employee demand by course.
- Enter additional employee details by course.

## Pages Used to Define Employee Training Demand and Demand by Course

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Employee Demand - Employee Demand Profile	TRN_DEMAND_EE_1	Administer Training, Training Budget, Identify Training Demand, Employee Demand, Employee Demand Profile	Enter the courses that the selected employee requires during the budget period set up on the Budget Period page. Enter audit information for the demand.
Employee Demand - Demand Details	TRN_DEMAND_EE_2	Administer Training, Training Budget, Identify Training Demand, Employee Demand, Demand Details	Enter additional employee demand details, including job code, department, and training costs.
Employee Demand by Course	TRN_DEMAND_EECRS_1	Administer Training, Training Budget, Identify Training Demand, Employee Demand by Course, Employee Demand by Course	Define the employees who require the selected training course and enter audit information for the demand.



Page Name	Definition Name	Navigation	Usage
Employee Demand by Course - Demand by Course Details	TRN_DEMAND_EECRS_2	Administer Training, Training Budget, Identify Training Demand, Employee Demand by Course, Demand by Course Details	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 Period page.

Enter audit information for the demand.

### Navigation

Administer Training, Training Budget, Identify Training Demand, Employee Demand, Employee Demand Profile

### Image: Employee Demand - Employee Demand Profile page

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.

The screenshot displays the 'Employee Demand Profile' page with the following fields and controls:

- Page Tabs:** 'Employee Demand Profile' (selected) and 'Demand Details'.
- Budget Period:** K2000CALYR
- Business Unit:** CAN01
- Frozen:** ☐
- Employee ID:** KC0021
- Name:** Craig Davies
- From Date:** 01/01/2000
- Thru Date:** 12/31/2000
- Employee Demand Information Section:**
  - Creation Date:** 06/01/2000
  - Revision Date:** (empty)
  - Demand ID:** 000011
  - Employment Record:** 0
  - \*Description:** Davies, Craig R
  - Short Description:** Davies, Cra
  - Originator:** Supervisor
  - Originating Employee ID:** KU0008
  - Demand Priority:** Medium
  - Expiration Date:** (empty)
- Course Information Section:**
  - Category:** COMPUTERS
  - Subcategory Code:** PROG LANG
  - Not in Catalog:** ☐
  - Course Code:** K017
  - Course Name:** Java Programming
  - Country:** France
  - \*Training Plan Category:** Not Specified

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

**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

**(FRA) Training Plan Category** Select a training plan category.

The values are: *Skill Development, Adaptation to Job Change, 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

### Image: Employee Demand - Demand Details page

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.

### 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 Period table. Budgets are automatically converted to the default base currency that you establish on the Training Base Currency 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

### Image: Employee Demand by Course page

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.

The screenshot shows the 'Employee Demand by Course' page with the 'Demand by Course Details' tab selected. The page contains several sections of fields and controls:

- Header Section:**
  - Budget Period: KF001
  - Business Unit: FRA01
  - Category: HUMRES
  - Subcategory Code: NEW HIRE
  - Course Code: KF002
  - Course Name: Corporate Orientation
  - From Date: 01/01/2000
  - Thru Date: 12/31/2000
  - Checkboxes: ☐ Frozen, ☐ Not in Catalog
- Employee Demand Section:**
  - Find | View All | First 1 of 2 | Last
  - Creation Date: 12/02/1999
  - Revision Date:
  - Demand ID: 000018
  - Employee ID: KF0007
  - Employment Record: 0
  - Description: Desmarests, Jean
  - Short Description: Desmarests,
  - Originator: Supervisor
  - Originating Employee ID:
  - Demand Priority: Medium
  - Expiration Date:
- Footer Section:**
  - France
  - \*Training Plan Category:

#### 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

### Image: Employee Demand by Course - Demand by Course Details page

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.

### 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

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## 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

### 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 Period 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.

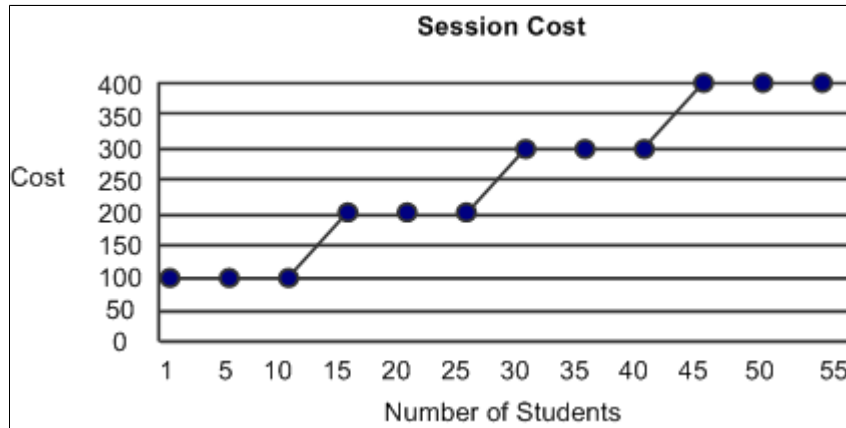
2. You add another student to the demand.

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.

**Image: Relationship of cost to the number of students that are expected to take a course**

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:



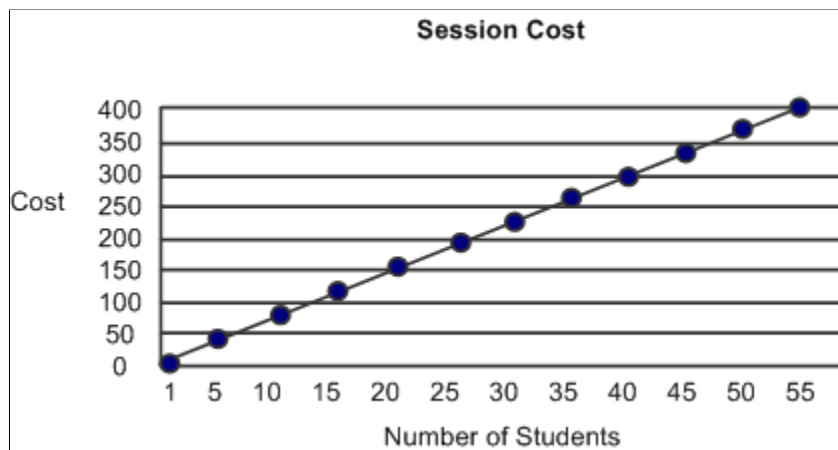
To avoid this problem, the system uses the following formula to calculate session padding and determine the cost of the training demand:

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.

**Image: Adjusted session cost based on number of employees in a training demand**

The following graph shows session costs when the progressive factor is applied. In this graphic, costs increase at a steady 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.

<b>Cost Unit</b>	<b>Cost Computation Detail</b>
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).

<b>Cost Unit</b>	<b>Cost Computation Detail</b>
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

Using the Adjust Department Demand component, you can:

- Create budget plan scenarios for a particular period.

You work on training budget scenarios one department at a time. The first time that you adjust department demand, the system generates a scenario that is based on the demands that you set up. As you adjust the demand further, you create new scenarios.

- Calculate computed costs of training and compare them to the budgeted amount for a scenario.
- Determine how many employees the department can afford to train during a specified budget period.

The information that you enter on these pages is stored in the TRN\_SIMULATION and TRN\_SCENARIO tables.

These topics discuss how to:

- Develop training plan scenarios.
- (FRA) Enter country-specific department information.
- Review training component cost details.

## Pages Used to Create Department Scenarios

Page Name	Definition Name	Navigation	Usage
Adjust Department Demand - Demands	TRN_ADJ_DEM_TABLE	Administer Training, Training Budget, Create Budget Plan, Adjust Department Demand, Demands	Develop a training plan scenario and make adjustments for demand IDs by department.
Adjust Department Demand - Gender/Socio Prof Distribution	TRN_DPT_DMD_SEC2	Click the Distribution link on the Adjust Department Demand - Demands page.	(FRA) Enter country-specific department information.
Costs Details - Costs Details	TRN_SML_COST_TABLE	Administer Training, Training Budget, Create Budget Plan, Adjust Department Demand, Costs Details	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

### Image: Adjust Department Demand - Demands page

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.

The screenshot displays the 'Adjust Department Demand - Demands' page. At the top, there are tabs for 'Demands' and 'Costs Details'. Below the tabs, the page shows the following information:

- Budget Period:** KF001
- Business Unit:** FRA01
- Department:** 10200
- Location:** France HQ

The main section is titled 'Scenarios' and includes a 'Find' button and a 'First' button. Below this, there is a 'Go To Row' button and a '1 of 2' indicator. The table below shows the following data:

Demand ID	Distribution	Description	Priority	Inside Department Approved	Inside Department Demand	All Departments Approved	All Departments Demand
000014	Distribution	Time Management	2	8	10	22	29
000019		Berger,Maurice	2	1	1	1	1
<b>Total</b>							
				9	11	23	30

Below the table, there is a 'Refresh' button. At the bottom of the page, the 'Budget / Costs' section shows the following information:

- Budget Amount:** 2,000,000.00
- Currency:** FRF
- Ratio:** 96.11 %
- Computed Cost:** 1,922,148.624

## Scenarios

### 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.

---

### 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.



<b>Inside Department Demand</b>	Displays the total demand that you specified for the selected demand ID.
<b>All Departments Approved</b>	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.
<b>All Departments Demand</b>	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.

**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.

<b>Budget Amount</b>	The default budget amount for this period appears from the Department Budget page.
<b>Ratio</b>	The percentage of the budget amount that the computed cost represents.
<b>Computed Cost</b>	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.

### Image: Adjust Department Demand - Gender/Socio Prof Distribution 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.

**Gender/Socio Prof Distribution**

France

**Distribution by**

**Gender**

Female

Male

**Socio Professional Category**

Executive

Manager

Office Worker

Qualified Worker

Non Qualified Worker

**Training Plan Category**

Training Plan Category Not Specified

OK Cancel

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

### Image: Costs Details - Costs Details page

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.

The screenshot displays the 'Costs Details' page with the following elements:

- Navigation Tabs:** Demands, Costs Details (selected).
- Filters:** Budget Period: KF001, Business Unit: FRA01, Department: 10200, France HQ.
- Scenario Section:**
  - \*Scenario: BASE
  - Cost Source: Total Cost
  - Buttons: Refresh, Go To Row
- Table:**

Demand ID	Description	Approved	Computed Cost
000014	Time Management	8	0.000
000019	Berger, Maurice	1	0.000
- Budget / Costs Summary:**

Budget Amount	2,000,000.00	Currency	FRF	Ratio	---	Computed Cost	0.000
---------------	--------------	----------	-----	-------	-----	---------------	-------

## Scenarios

### 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

### 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

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Create Scenario By Criteria - Criteria 1	RUNCTL_TRN008_1	Administer Training, Training Budget, Create Budget Plan, Create Scenario by Criteria, Criteria 1	Include or exclude departments, job codes, and competencies for a budget period and business unit in the global scenario.

Page Name	Definition Name	Navigation	Usage
Create Scenario By Criteria - Criteria 2	RUNCTL_TRN008_2	Administer Training, Training Budget, Create Budget Plan, Create Scenario by Criteria, Criteria 2	Write criteria to specify courses to include in the scenario.
Create Global Scenario	RUNCTL_TRN007	Administer Training, Training Budget, Create Budget Plan, Create Global Scenario, Create 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: PeopleSoft Process Scheduler*

## Create Scenario by Criteria - Criteria 1 Page

Use the Create 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.

### Navigation

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

### Image: Create Scenario by Criteria - Criteria 1

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

The screenshot shows the 'Create Scenario by Criteria - Criteria 1' page. At the top, there are tabs for 'Criteria 1' and 'Criteria 2'. Below the tabs, there are buttons for 'Run Control ID PS', 'Report Manager', 'Process Monitor', and a 'Run' button. There are also input fields for 'Budget Period', 'Business Unit', and 'New Scenario'. Below these fields, there is a section for 'Or' with a 'Find | View All' button and a 'First 1 of 1 Last' button. There are also checkboxes for '\*Criteria Nbr 1', 'Active New Scenario', and 'Link with Competencies'. The main section is divided into 'Include' and 'Exclude' criteria. Each section has sub-sections for 'Department', 'Job Code', and 'Competency'. Each sub-section has a search field, a tree view, and a level selector.

**Budget Period and Business Unit**

Select a budget period and business unit to associate with the new global scenario.

**Or**

**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 by Criteria 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.

**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****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

### 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

### Image: Including criteria statement

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

The screenshot shows the 'Include' criteria statement interface. It consists of three panels: Department, Job Code, and Competency. The Department panel has a search box with '10000' and a tree view showing 'Human Resources'. The Job Code panel has a search box with '140055'. The Competency panel has a search box and a \*Level dropdown.

### Image: Excluding criteria statement

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:

The screenshot shows the 'Exclude' criteria statement interface. It consists of three panels: Department, Job Code, and Competency. The Department panel has a search box and a tree view. The Job Code panel has a search box. The Competency panel has a search box and a \*Level dropdown.

---

**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 HCM 9.2: Human Resources Manage Profiles*)"

"Understanding Profile Management (*PeopleSoft HCM 9.2: Human Resources Manage Profiles*)"

## Create Scenario by Criteria - Criteria 2 Page

Use the Create 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, Create Scenario by Criteria, Criteria 2

### Image: Create Scenario by Criteria - Criteria 2 page

This example illustrates the fields and controls on the Create 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 Create Scenario by Criteria - Criteria 1 page, enter the courses to include or exclude from the global scenario.

**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: PeopleSoft Process Scheduler* product documentation.

## Create Global Scenario Page

Use the Create 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, Create Global Scenario, Create Global Scenario

### Image: Create Global Scenario page

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

#### Budget Period and Business Unit

Select the budget period and business unit to be associated with the new scenario.

## Scenario Type

### 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

### 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.

### 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.

### 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: PeopleSoft Process Scheduler* product documentation.

---

## Activating Scenarios and Viewing Summaries

These topics discuss how to:

- Activate scenarios.
- View cost details.
- View demand details.

## Pages Used to Activate Scenarios and View Summaries

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Choose Active Scenario	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-Apprvls	TRN_ADJ_DEP_TABLE	Administer Training, Training Budget, Create Budget Plan, Review Active Scenarios - Apprvls, Review Active Scenario-Apprvls	View approved demands for the active scenario.
Summarize Active Scenario - Total Costs	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.
Summarize Active Scenario - Demands	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

### Image: Choose Active Scenario page

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.

### Choose Active Scenario

Budget Period KF001      Business Unit FRA01      Department 10200      France HQ

Scenarios				Personalize	Find	View All	First	1-2 of 2	Last
Scenario	Approved	Ratio	Computed Cost	Active Scenario					
BASE	1	96.11 %	1,922,148.623	<input checked="" type="checkbox"/>					
HIGH	1	119.93 %	2,398,607.654	<input type="checkbox"/>					

Budget Amount
 

2,000,000.00    FRF

Refresh

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

### Image: Summarize Active Scenario - Total Costs page

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

### Image: Summarize Active Scenario - Demands page

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.

Total Costs		Demands	
Budget Period KF001		Business Unit FRA01	
		Base Currency FRF	
Demands		Personalize   Find   View All     First 1-6 of 6 Last	
Demand ID	Description	Approved	Demand
000014	Time Management	22	29
000015	Project Management	10	15
000016	Project Management	4	8
000017	Grand,Stephane	1	1
000018	Desmarets,Jean	1	1
000019	Berger,Maurice	1	1
Total Demands		39	55

#### 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:

- Define departmental views.
- Review a course list.
- Review training plans.

## Pages Used to Track Training Plans

Page Name	Definition Name	Navigation	Usage
Department View	TRN_DSPL_TARGET	Administer Training, Define Budget, Department View, Department View	Define departmental groups to display all or part of the training plan and compare actual costs to budgeted costs.
Review Training Plan - Course List	TRN_PLAN_APR_TABLE	Administer Training, Training Budget, Budget Reports, Review Training Plan, Course List	View training plans by department.
Review Training Plan - Training Plan	TRN_PLAN_TABLE	Administer Training, Training Budget, Budget Reports, Review Training Plan, Training Plan	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

### Image: Department View page

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.

### Department View

Business Unit FRA01
Name France Business Unit

Dept View ID KF001

\*Description All French Departments

Short Description Fra Dpts

#### Department View Details

Find | View All
First 1-6 of 7 Last

Department ID 10200	Department France Headquarters
Department ID 11000	Department Information System/Technology
Department ID 13000	Department Operations- Paris
Department ID 14000	Department Administrative Department
Department ID 15000	Department Hotline- Bordeaux
Department ID 21600	Department Sales & Services - France

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

### Image: Review Training Plan - Course List page

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.

The screenshot displays the 'Review Training Plan - Course List' page. At the top, there are tabs for 'Course List' and 'Training Plan'. Below the tabs, the page shows the following information:

- Budget Period:** GFBP2006
- Business Unit:** FRA01
- Department View ID:** KF001
- Base Currency:** EUR

Below this information is a section titled 'Training Plan Details' with a 'Personalize' link and a 'Find' button. The table below shows the course list:

Course Code	Description	Cost	Approved	Duration	Duration Units
		0.00	0	0.0	Hours

At the bottom of the page, there is a 'Total' row with the following values:

Total		0.00	0	0.0	Hours
-------	--	------	---	-----	-------

## 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

### Image: Review Training Plan - Training Plan page

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Freeze Budget Period	TRN_FREEZE_PERIOD	Administer Training, Training Budget, Freeze Training Budget, Freeze Budget Period, Freeze Budget Period	Freeze or unfreeze a budget period.
Move Non-Approved Demands	RUNCTL_TRN015	Administer Training, Training Budget, Freeze Training Budget, Move Non-Approved Demands, Move Non-Approved Demands	Move unapproved demands to the next budget period after the current budget period has been frozen.
Delete Inactive Gbl Scenario (delete inactive global scenario)	RUNCTL_TRN031	Administer Training, Training Budget, Create Budget Plan, Delete Inactive Gbl Scenario, Delete Inactive Gbl Scenario	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

#### Image: Freeze Budget Period page

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.

### Freeze Budget Period

Budget Period

GFBP2006

Description

GF BUDGET PERIOD YEAR 2006

☐ Frozen

Business Unit

FRA01

Name

France Business Unit

From Date

01/01/2006

Thru Date

12/31/2006

Base Currency

EUR

Budget / Costs

Approved

0

Budget

0.00

Ratio

---

Computed Cost

0.00

Refresh

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 Non-Approved Demands Page

Use the Move Non-Approved 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 Non-Approved Demands, Move Non-Approved Demands

### Image: Move Non-Approved Demands page

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

Move Non-Approved Demands

Run Control ID PS

Report Manager

Process Monitor

Run

Language French

Budget Period

Business Unit

Target Budget Period

Data Override

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.

<b>Budget Period and Business Unit</b>	Select the budget period and business unit to move the unapproved demands from.
<b>Target Budget Period</b>	Select the budget period to move the demands to.
<b>Note:</b> Apply this process to unapproved budgets before creating new demands for the target budget period.	
<b>Data Override</b>	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 Gbl Scenario Page

Use the Delete Inactive Gbl 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 Gbl Scenario, Delete Inactive Gbl Scenario

### Image: Delete Inactive Gbl Scenario page

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

The screenshot shows the 'Delete Inactive Gbl Scenario' page. At the top, there's a title bar with the title 'Delete Inactive Gbl Scenario'. Below the title bar, there are navigation links: 'Run Control ID PS Report Manager Process Monitor' and a 'Run' button. The main content area is titled 'Scenario Details'. It contains a table with the following columns: '\*Scenario', 'Budget Period', and 'Business Unit'. The '\*Scenario' column has a search icon. The 'Business Unit' column has '+' and '-' buttons. The table shows 1 of 1 results.

When you run this process, the system deletes data from the TRN\_SIMULATION and TRN\_SCENARIO tables.

### Scenario Details

#### 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: PeopleSoft Process Scheduler*.

---

## **Running Budget Training Reports**

This topic discusses how to generate budget training reports.

### **Pages Used to Run Budget Training Reports**

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Active Scenario Summary	RUNCTL_TRN010	Administer Training, Training Budget, Budget Reports, Active Scenario Summary, Active Scenario Summary	Summarize approved training demands and budget information for a business unit. This is an SQR report.
Global Scenario Summary	RUNCTL_TRN011	Administer Training, Training Budget, Budget Reports, Global Scenario Summary, Global Scenario 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 Plan Summary	RUNCTL_TRN030	Administer Training, Training Budget, Budget Reports, Training Plan Summary, Training Plan Summary	<p>List all courses that are included in the training plan for a given budget period and business unit.</p> <p>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.</p>

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
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

<b>Business Unit</b>	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.
<b>Department</b>	Select a department to associate with the selected business unit.
<b>TrngReq Nbr (training request number)</b>	The system displays this number on some course evaluation pages.
<b>(FRA) Financing Department</b>	Select the department that finances the training session.
<b>(FRA) Financed Cost</b>	Enter the amount if some or all of the cost is financed by an external fund.
<b>(FRA) Financing Fund</b>	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 new course sessions.
- View instructor schedules.
- Set up general session information.
- Set up session locations and instructors.
- View and update session address and contact details.
- Select training rooms.
- Choose instructors.
- Specify required equipment and materials.
- View available equipment and materials.
- Define miscellaneous expenses.
- View session details.

## Pages Used to Plan and Set Up Course Sessions

<i><b>Page Name</b></i>	<i><b>Definition Name</b></i>	<i><b>Navigation</b></i>	<i><b>Usage</b></i>
Course Session Planner	CRS_SESS_PLAN1	Administer Training, Define Course/Cost Details, Course Session Planner, Course Session Planner	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. (course session planner instructor)	TRN_PLAN_INSTR_SEC	Click Instructor name in the Instructor Booked Time group box on the Course Session Planner page.	View instructor schedules.
Course Session Profile	COURSE_SESSN_TBL1	Administer Training, Define Course/Cost Details, Course Sessions, Course Session Profile	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.



<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Course Sessions - Location, Instructor	COURSE_SESSN_TBL2A	Administer Training, Define Course/Cost Details, Course Sessions, Location, Instructor	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	TRN_FACIL_ADDR_SEC	Click Training Facility Address on the Course Sessions - Location, Instructor page.	View and update the address and contact details of the course session or cut session.
Select free Training Room	TRN_ROOM_SEL_SEC	Click Select free Training Room on the Course Sessions - Location, Instructor page.	Select a training room for the course session or cut session.
Select Free Instructor	TRN_INSTR_SEL_SEC	Click Select free Instructor on the Course Sessions - Location, Instructor page.	Select an instructor for the course session or cut session.
Course Sessions - Equipment	COURSE_SESSN_TBL3A	Administer Training, Define Course/Cost Details, Course Sessions, Equipment	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	TRN_FAC_EQUIP_SEC	Click the Training Facility Equipment link on the Course Sessions - Equipment page.	View the equipment and materials available at the training facility.
Course Sessions - Expense	COURSE_SESSN_TBL4A	Administer Training, Define Course/Cost Details, Course Sessions, Expense	Define miscellaneous expenses that are associated with a course session. Set up the Tuition Expense Type page before using this page.
Review Session Summary	TRN_CRS_STUDNT_SUM	Administer Training, Result Tracking, Review Session Summary, Review Session Summary	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

### Image: Course Session Planner page

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.

The screenshot shows the 'Course Session Planner' interface. At the top, it displays 'Course Code KFG004 Motivation Management' and 'Duration 3.0 Day'. Below this are search criteria: 'Start Date 02/08/2013', 'End Date 03/29/2013', 'Start Time 9:00AM', and 'End Time 5:00PM'. There is a 'Course Session Setup' link. Further down, 'Facility HXTRN' and 'Room Code 100' are shown. The interface includes two main grids: 'Training Room Booked Time' and 'Instructor Booked Time'. The 'Training Room Booked Time' grid has columns for Facility, Room Number, Start Date, End Date, Start Time, and End Time. The 'Instructor Booked Time' grid has columns for Instructor, Name, Start Date, End Date, Start Time, and End Time. Both grids show '1 of 1' results. Navigation links like 'Personalize', 'Find', 'View All', and 'First/Last' are present for both grids.

### 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.

**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.

### Image: Course Session Planner Instr. 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.

Course Session Planner Instr.	
Instructor ID	KFGE0002 Julie Tourelle
Description Change Piloting	
Start Date	01/07/2001
End Date	01/08/2001
Start Time	8:00AM
Period End Time	5:00PM
<a href="#">Return</a>	

### 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

### Image: Course Session Profile page

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.

The screenshot shows the 'Course Session Profile' page with the following fields and controls:

- Course:** KFG004 Motivation Management
- Course Status:** Active
- Session Number:** 0001
- School:** (blank)
- School Code:** (blank)
- \*Session Status:** Active (dropdown menu)
- \*Start Date:** 04/10/2001 (calendar icon)
- End Date:** 04/12/2001 (calendar icon)
- Start Time:** 8:00AM
- End Time:** 5:00PM
- Duration:** 3.0
- Duration Unit:** Day (dropdown menu)
- Minimum Nbr of Students:** 1
- Maximum Nbr of Students:** 10
- Session Language:** (blank)
- Vendor ID:** (blank)
- Session Administration:** ☒ (checked)
- Rescheduled:** ☐ (unchecked)

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.

### 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.

### 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.

**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

## Image: Course Sessions - Location, Instructor page

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.

The screenshot displays the 'Course Sessions - Location, Instructor' page. At the top, there are tabs: 'Course Session Profile', 'Location, Instructor' (selected), 'Equipment', and 'Expense'. Below the tabs, the course details are shown: 'Course KFG004 Motivation Management' and 'Course Status Active'. The session details are 'Session Nbr 0001' and 'Session Status Active'. The 'Training Location' section contains fields for 'Start Date' (04/10/2001), 'End Date' (04/12/2001), '\*Start Time' (8:00AM), 'End Time' (5:00PM), 'Duration' (3.0), 'Duration Unit' (Day), 'Facility' (KF004 - Paris), 'Vendor ID', and 'Training Facility Address'. There is a 'Select free Training Room' button. Below this, the 'Room Code' is KF001, and there are fields for 'Building' and 'Floor Nbr'. The 'Instructor' section has a 'Vendor' field, a 'Select free Instructor' button, 'Instructor ID' (KFGE0002), and 'Name' (Julie Tourelle). Navigation links like 'Find', 'View All', 'First', '1 of 1', and 'Last' are present for both the Training Location and Instructor sections.

## 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.

### 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****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.

### Image: Course Sessions - Training Facility Address 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 screenshot shows a dialog box titled "Training Facility Address". At the top, it displays "Facility KF004" and "Facility Name Paris". Below this, there are two input fields: "Contact Name" and "Phone". Underneath these fields, it shows "Country FRA" and "France", and "Address 125 rue Sebastien Mercier 75015 Paris". At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

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.

#### 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.

### Image: Select free Training Room 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.

Select Free Training Room

Facility KF004 Facility Name Paris

Training Room Availability

Personalize | Find | View All | [Icons] First 1 of 1 Last

Room Code	Room Number

OK Cancel

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.

#### 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.

### Image: Course Sessions - Select Free 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.

Select	Instructor ID	Name	Vendor
<input type="checkbox"/>	KFG0017	Louis Ledoux	

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.

**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 HCM 9.2: 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

### Image: Course Sessions - Equipment page

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.

The screenshot shows the 'Equipment' tab selected. The page displays the following information:

- Course:** KFG004 Motivation Management
- Course Status:** Active
- Session Nbr:** 0001
- Session Status:** Active
- Training Room Equipment:** A table with columns for 'Equipment/Materials Code' and 'Quantity'. The table is currently empty.
- Fixed Equipment/Materials:** A table with columns for 'Equipment/Materials Code' and 'Quantity'. The table is currently empty.
- Session Equipment/Materials:** A section with a search input field for '\*Equipment/Materials Code' and a quantity field set to '1'.

## 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.

### 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.

**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.

### Image: Course Sessions - Training Facility 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.

Training Facility Equipment

Facility KF004 Facility Name Paris

Facility Equipment/Materials

Personalize | Find | View All | First 1 of 1 Last

Equipment/Materials Code	Description	Quantity

Return

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

## Image: Course Sessions - Expense page

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.

The screenshot displays the 'Expense' tab within the 'Course Sessions' interface. The header area shows the course details: 'Course KFG004 Motivation Management', 'Session Nbr 0001', 'Course Status Active', and 'Session Status Active'. The main content area is titled 'Expense' and contains a search input field with the value 'KF003' and a search icon. To the right of the search field is the label 'Mileage'. Navigation links 'Find | View All' and pagination controls 'First 1 of 1 Last' are visible. At the bottom right of the search bar are '+' and '-' buttons.

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\_STUDENT\_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

### Image: 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.

### Review Session Summary

Course Code

KFG004

Course Name

Motivation Management

Session Number

0001

Status

Active

Start Date

04/10/2001



End Date

04/12/2001

Language

Facility

Paris

Session Summary		Personalize   Find   View All    		First  1 of 1  Last
Employee ID	Name	Status	Grade	
KFGE0004	Murielle Parienta	Enrolled		

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.

#### 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:

- Enter vendor costs for a course session.
- Set up session costs associated with the facility and instructor.
- Record costs associated with required equipment.

- Record costs associated with session expenses.

---

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

---



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

---

## Pages Used to Set Up Course Session Costs

<i><b>Page Name</b></i>	<i><b>Definition Name</b></i>	<i><b>Navigation</b></i>	<i><b>Usage</b></i>
Course Session Costs - Vendor	CRS_SESSN_TBL5_GBL	Administer Training, Define Course/Cost Details, Course Session Costs, Vendor	Enter vendor costs for a course session. Vendor costs are set up in the Course Session table.
Course Session Costs - Facility, Instructor	CRS_SESS_TBL6A_GBL	Administer Training, Define Course/Cost Details, Course Session Costs, Facility, Instructor,	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	CRS_SESS_TBL7A_GBL	Administer Training, Define Course/Cost Details, Course Session Costs, Equipment	Record costs that are associated with course equipment.
Course Session Costs - Expense	CRS_SESSN_TBL8_GBL	Administer Training, Define Course/Cost Details, Course Session Costs, Expense	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

### Image: Course Session Costs - Vendor page

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.

Vendor		Facility, Instructor		Equipment		Expense	
Course KFG004 Motivation Management				Course Status Active			
Session Nbr 0001				Session Status Active			
Start Date 04/10/2001							
<div> <div> Vendor  Per Unit Cost <input type="text"/>   Cost Unit <input type="text" value="Hour"/>   Department <input type="text"/> </div> <div> Currency <input type="text" value="USD"/>  Business Unit <input type="text"/> </div> </div>							
<div> <div>  France </div> <div> Financed Cost <input type="text"/>   Cost Unit <input type="text" value="Hour"/>  Financing Department <input type="text"/> </div> <div> Currency USD  Financing Fund <input type="text"/> </div> </div>							
<div> <input type="checkbox"/> Certified  <input type="checkbox"/> Chargeable  <input type="checkbox"/> Billed </div>							
Date Entered <input type="text"/>							
Agreement Date <input type="text"/>							
Agreement Number <input type="text"/> 							
Company <input type="text"/>							

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.

#### 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 Period table. Budgets are automatically converted to the default base currency that you established on the Training Base Currency table (TRN\_BASE\_CURRENCY).

#### 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.

### 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.

### 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

### Image: Course Session Costs - Facility, Instructor page (1 of 2)

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.

Vendor Facility, Instructor Equipment Expense

Course KFG004 Motivation Management Course Status Active  
Session Nbr 0001 Session Status Active  
Start Date 04/10/2001

**Facility** Find | View All First 1 of 1 Last

Start Date 04/10/2001 Vendor  
Facility KF004 Paris Room Code KF001  
Per Unit Cost 300.00 Currency EUR  
Cost Unit Day Business Unit  
Department

France

Financed Cost 900.000 Currency EUR  
Cost Unit Day Financing Fund KFGV03 Find Fund  
Financing Department

### Image: Course Session Costs - Facility, Instructor page (2 of 2)

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.

**Instructor** Find | View All First 1 of 1 Last

Instructor KFGE0002 Julie Tourelle

Vendor  
Per Unit Cost \$0.00 Currency USD  
Cost Unit Hour Business Unit  
Department Duration 3.0  
Unit Day ☒ System Maintained

France

Financed Cost Currency USD  
Cost Unit Hour Financing Fund  
Financing Department ☐ Chargeable

## 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.

### 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 Period table. Budgets are automatically converted to the default base currency that you establish on the Training Base Currency 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.

**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:  $\text{Per Unit Costs} = \text{Employee Salary} * \text{Session Duration} / \text{Paid Hours}$ . 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.

<b>Per Unit Cost</b>	Enter the cost for the instructor associated with this session. In the next field, the default currency appears. You can select a different currency.
<b>Cost Unit</b>	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 <i>Daily</i> .
<b>Refresh button</b>	Click the Refresh button to display the default values from the Course Session Costs—Facility, Instructor page.
<b>Duration and Unit</b>	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.
<b>System Maintained</b>	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.
<b>(FRA) Chargeable</b>	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

### Image: Course Session Costs - Equipment page

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.

#### 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 Period table. Budgets are automatically converted to the default base currency that you establish on the Training Base Currency 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

### Image: Course Session Costs - Expense page

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.

### 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 Period table. Budgets are automatically converted to the default base currency that you establish on the Training Base Currency 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*.

### 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](#)

*PeopleSoft 9.2: Events and Notifications Framework*

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## Recording Student Feedback

These topics discuss how to:

- Record general student feedback on course sessions.
- (USF) Enter individual training evaluations.
- Record specific student feedback.

## Pages Used to Record Student Feedback

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Evaluate Course Session	COURSE_EVALUATNS	Administer Training, Result Tracking, Evaluate Course Session, Evaluate Course Session	Record student feedback on course sessions so that you know what areas need improvement.
Individual Training Evaluation - Course Information	GVT_TRNREQ_SEC_CE1	Administer Training, Result Tracking, Individual Training Evaluation, Course Information	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.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Individual Training Evaluation - Evaluation Data	GVT_TRNREQ_SEC_CE2	Administer Training, Result Tracking, Individual Training Evaluation, Evaluation Data	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

### Image: Evaluate Course Session page

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.

The screenshot displays the 'Evaluate Course Session' page. At the top, it shows 'Course KF002 Corporate Orientation' and 'Session Nbr 0001'. Below this, 'Start Date 04/20/2000' and 'Facility Paris' are listed. A 'Session Average Rating' section is visible, followed by an 'Instructor' section showing 'Giraud,Philippe' and 'CEGOS'. The 'Ratings Area' section includes a dropdown for '\*Rating Area' set to 'Content'. Below this, there are fields for 'Average Rating', 'Rating Points', and '\*Total Count', each with a dropdown or input field. Navigation links like 'Find | View All' and 'First 1 of 1 Last' are present throughout the interface.

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

**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****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.

**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

### Image: Individual Training Evaluation - Course Information page

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.

The screenshot shows the 'Course Information' tab selected. The header displays the employee's name 'Florence Gautier' and 'Empl ID KF0025'. Below this, the 'Course Information' section includes 'Course Code KF001', 'Time Management', 'Session Nbr 0001', and 'Training Request Number NEW'. There are navigation links 'Find | View All' and pagination 'First 1 of 1 Last'. The form is divided into several sections: 'Course was Completed' with 'Yes' (selected) and 'No' radio buttons and a 'Use comment section to explain' link; 'Actual Course Dates' with 'Commenced' and 'Completed' date pickers; 'Course Hours' with 'Duty' and 'Non-Duty' input fields; 'Academic Info' with a 'Grade/Score' input field; 'All Sessions Attended' with 'Yes' (selected) and 'No' radio buttons and a 'Use comment section to explain' link; and 'Comments' with a large text area. At the bottom, there are two dropdown menus: '\*Stated Objective Accomplished' and '\*Coverage of Subject Matter'.

Federal users can enter detailed training evaluations for individual employees.

#### All Sessions Attended

Select *Yes* or *No*.

#### Comments

Enter an optional explanation of the responses to the preceding fields.

## Actual Course Hours

#### 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

### Image: Individual Training Evaluation - Evaluation Data page

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.

The screenshot shows the 'Evaluation Data' tab for Florence Gautier (Empl ID KF0025). The page displays a list of evaluation items with dropdown menus for selection. The items are:

- \*Organization of Subject Matter
- \*Suitability of Instr Materials
- \*Level of Difficulty
- \*Length of Course
- \*Amt of Outside or Evening Work
- \*Effectiveness of Instructors
- \*Appl of Subject Matter to Work
- \*Facilities
- \*Recommendations to Colleagues
- \*Meet Career Development Plans

**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.*

**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

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

<b><i>Page Name</i></b>	<b><i>Definition Name</i></b>	<b><i>Navigation</i></b>	<b><i>Usage</i></b>
Training Schedules	RUNCTL_TRN004	Administer Training, Training Reports, Training Schedules, Training Schedules	List course sessions that are scheduled within a given period. This is a Crystal report.





## Chapter 7

# Enrolling and Wait-Listing Students

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## Understanding Student Enrollment Options

These topics list common elements and discuss enrollment methods.

### Common Elements Used to Enroll and Wait-List Students

<b>First, Previous, Next, and Last</b>	Click to display another group of student IDs.
<b>Refresh Search Fields</b>	Click to clear the search criteria that you entered on the Name or ID Search page.
<b>Search on Name or ID</b>	Click to access the Name or ID Search page and filter students by name or ID.
<b>DIF</b>	Individual Training Rights ( <i>Droit Individuel a la Formation</i> ). Select this check box to calculate how many hours the employee gets for training purposes, according to his seniority, contract type and working hours.
<b>Training Out of Working Hours</b>	Specify the number of hours a student spends outside their work schedule.
<b>Training Plan Category</b>	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 an 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 samples of the following types of training letters:

- Confirmation of course session enrollment.
- Notification of course session rescheduling.
- Notification of course session cancellation.

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 (*PeopleSoft HCM 9.2: 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

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
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

### Image: Create Training Letters page

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.

#### 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.

#### 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 (*PeopleSoft HCM 9.2: Application Fundamentals*)"

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## 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	Navigation	Usage
Enroll Individually	COURSE_ENROLLMENT	Administer Training, Student Enrollment, Enroll Individually, Enroll Individually	<p>Enroll individual students, add them to a course session waiting list, and adjust to existing subscriptions. Check the results of the automatic enrollment.</p> <p>To adjust several student subscriptions, use the Course Session Auto Enrollment page.</p>

### 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

### Image: Enroll Individually page (1 of 2)

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.

### Enroll Individually

Course:	H100 Hospital Orientation	Session Nbr:	0004 Active
Start Date:	07/20/1998	Start Time:	9:00AM
Facility:	Hospital	Language:	
Min Students:	5	Max Students:	20
Nbr Enrolled:	0	Nbr Waiting:	0

[Prerequisite Checking](#)
[Transfer-Course Session Setup](#)

#### Attendance

Find | View All First 1 of 1 Last

Empl ID:	<input type="text"/>			
Empl Record:	<input type="text" value="0"/>			
*Attendance:	Approved		Status Date:	06/29/2009
Training Reason:	<input type="text"/>			
Letter Code:	<input type="text"/>		Date Letter Printed:	
	<input type="checkbox"/> Prerequisites Met		Grade:	<input type="text"/>

#### Department

Business Unit:	<input type="text"/>	
Department:	<input type="text"/>	

#### Demand from Budget Training

Search Criteria:	<input type="checkbox"/> Population	<input type="checkbox"/> Catalog	Demand ID:	<input type="text"/>
France				
	<input type="checkbox"/> Professionalization Period	<input type="checkbox"/> DIF		
	<input type="checkbox"/> Training Leave	<input type="checkbox"/> Out of Working Schedule		
	<input type="checkbox"/> Part Time Course			
*Training Plan Category:	Not Specified			

#### Training Duration

☒ Training Duration from Session
 ☐ Specify Student Duration

Time Spent at Training:	<input type="text" value="16.0"/>	Hour
-------------------------	-----------------------------------	------

**Image: Enroll Individually page (2 of 2)**

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.

**Demand from Budget Training**

**Search Criteria**

☐ Population ☐ Catalog Demand ID

☒ France

☐ Professionalization Period ☐ DIF

☐ Training Leave ☐ Out of Working Schedule

☐ Part Time Course

\*Training Plan Category

**Training Duration**

☒ Training Duration from Session ☐ Specify Student Duration

Time Spent at Training  Hour

**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.

**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****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 <i>Request</i> to <i>Authorized</i> to <i>Enrolled</i> or <i>Waitlisted</i> .
<b>Status Date</b>	Displays the system date, usually today's date, as the initial value, which you can change.
<b>Waitlist Entry Date (waitlist date)</b>	Enter the waiting list date if the student is on a session waiting list and has an Attendance status of <i>Sessn Wait</i> . The system hides this field when the student is enrolled in a training course.
<b>Training Reason</b>	Select a reason for the training.
<b>Letter Code</b>	Enter a letter code to generate a form letter. Values are:  <i>CON</i> : Use if the student's status is <i>Enrolled</i> .  <i>WTS</i> : Use if the student's status is <i>Session Waitlist</i> .
<b>Date Letter Printed</b>	Displays the date once you generate the letter.
<b>Prerequisites Met</b>	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.
<b>Grade</b>	Appears when the student's status is <i>Completed</i> .
<b>Department</b>	
<b>Business Unit and Department</b>	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.

<b>Training Request Required</b>	Select this check box to process training request information for an employee. The system displays the Trn Request button and the Print SF182 icon.
<b>Training Request Data</b>	(USF) Click to access the Employee Training Request Data page and enter additional information.
<b>Print SF182</b>	(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.

### 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.

### 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).

**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.

**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](#)

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## Enrolling Students by Department Demand

These topics discuss how to:

- Enroll students by department.
- View subscribed employees.

## Pages Used to Enroll Students by Department Demand

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Department Demand	TRN_GNRL_DMND_SUBS	Administer Training, Student Enrollment, Enroll by Department Demands, Department Demand	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.
Department Demand - Subscriptions	TRN_GNRL_TRAIN_SUB	Administer Training, Student Enrollment, Enroll by Department Demands, Subscriptions	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.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
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

### Image: Department Demand page (1 of 2)

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.

Department Demand

Subscriptions

Budget Period

KF001

Year 2000 Budget Period

Business Unit

FRA01

France Business Unit

Demand ID

000014

Time Management

Department

10200

France Headquarters

Demands Filter

Display Demands

General Demand

Subscribed 19 Total 29

Department Demand

Subscribed 2 Total 8

Matching Employees

Personalize | Find | View All |

First 1-12 of 68 Last

	Employee ID	Employment Record	Course Code	Session Number	Start Date	End Date		Details
<input type="checkbox"/>	SFCW03	<div>0</div>	<div>KF001</div>	<div></div>			<input checked="" type="checkbox"/>	<a href="#">Details</a>
<input type="checkbox"/>	SFCW02	<div>0</div>	<div>KF001</div>	<div></div>			<input checked="" type="checkbox"/>	<a href="#">Details</a>
<input type="checkbox"/>	SFCS004	<div>0</div>	<div>KF001</div>	<div></div>			<input checked="" type="checkbox"/>	<a href="#">Details</a>
<input type="checkbox"/>	SFCA011	<div>0</div>	<div>KF001</div>	<div></div>			<input checked="" type="checkbox"/>	<a href="#">Details</a>
<input type="checkbox"/>	SFCA010	<div>0</div>	<div>KF001</div>	<div></div>			<input checked="" type="checkbox"/>	<a href="#">Details</a>
<input type="checkbox"/>	SFCA009	<div>0</div>	<div>KF001</div>	<div></div>			<input checked="" type="checkbox"/>	<a href="#">Details</a>
<input type="checkbox"/>	SFCA008	<div>0</div>	<div>KF001</div>	<div></div>			<input checked="" type="checkbox"/>	<a href="#">Details</a>

### Image: Department Demand page (2 of 2)

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.

<input type="checkbox"/>	SFCA010	<div>0</div>	<div>KF001</div>	<div></div>			<input checked="" type="checkbox"/>	<a href="#">Details</a>
<input type="checkbox"/>	SFCA009	<div>0</div>	<div>KF001</div>	<div></div>			<input checked="" type="checkbox"/>	<a href="#">Details</a>
<input type="checkbox"/>	SFCA008	<div>0</div>	<div>KF001</div>	<div></div>			<input checked="" type="checkbox"/>	<a href="#">Details</a>
<input type="checkbox"/>	SFCA007	<div>0</div>	<div>KF001</div>	<div></div>			<input checked="" type="checkbox"/>	<a href="#">Details</a>
<input type="checkbox"/>	SFCA006	<div>0</div>	<div>KF001</div>	<div></div>			<input checked="" type="checkbox"/>	<a href="#">Details</a>
<input type="checkbox"/>	SFCA005	<div>0</div>	<div>KF001</div>	<div></div>			<input checked="" type="checkbox"/>	<a href="#">Details</a>
<input type="checkbox"/>	SFCA004	<div>0</div>	<div>KF001</div>	<div></div>			<input checked="" type="checkbox"/>	<a href="#">Details</a>
<input type="checkbox"/>	SFCA003	<div>0</div>	<div>KF001</div>	<div></div>			<input checked="" type="checkbox"/>	<a href="#">Details</a>

Subscribe Demand

\*Attendance

Enrolled

☐ Prerequisite Checking

Subscribe

France

Override Training Category

Not Specified

☐ Keep Category from Demand

### Budget Period

Enter the budget period for the department demand to enroll in a course session.

<b>Demand ID</b>	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.
<b>Department</b>	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.
<b>Demands Filter</b>	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.
<b>Display Demands</b>	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.
<b>General Demand</b>	Displays the number of employees to be trained for this job code.
<b>Department Demand</b>	Displays the number of employees to be trained in a specific course for a particular department.
<b>Matching Employees</b>	
<b>Details</b>	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.
<b>Subscribe Demand</b>	
	In this group box, you enroll employees or add them to the course or session waiting list.
<b>Attendance</b>	Select from one of the following valid statuses:  <i>Crse Wait</i> (course wait-listed), <i>Enrolled</i> , and <i>Sessn Wait</i> (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.
<b>Prerequisite Checking</b>	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****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

**Image: Enroll by Department Demands - Subscriptions page**

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.

Department Demand		Subscriptions						
Budget Period	KF001	Year 2000 Budget Period						
Business Unit	FRA01	France Business Unit						
Department	10200	France Headquarters						
		<div>Department Demand</div> <div>Subscribed 2 Total 8</div>						
<div>Training Scheduled</div> <div>Personalize   Find   View All   [Icons]   First 1-2 of 2 Last</div>								
Demand ID	Employee ID	Employment Record	Attendance	Course	Session Number	Start Date	End Date	Details
000019	KF0001		0 Enrolled	KF003	0001	09/08/2000	09/08/2000	<a href="#">Details</a>
000014	KF0001		0 Completed	KF001	0001	02/03/2000	03/03/2000	<a href="#">Details</a>

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

Use the Enroll by Employee Demand component to enroll employees for training with the employee demand profile. This component is nearly identical to the Enroll by Department Demand component.



This topic lists pages used to enroll by employee demand.

## Pages Used to Enroll by Employee Demand

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Employee Demands	TRN_EMPL_DMND_SUBS	Administer Training, Student Enrollment, Enroll by Employee Demands, Employee Demands	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.
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

### Image: Employee Demands page

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

### 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 group members.
- View subscribed students.

## Pages Used to Enroll Students by Group

Page Name	Definition Name	Navigation	Usage
Enroll Group	TRN_GRP_ENROLL_GBL	Administer Training, Student Enrollment, Enroll by Group, Enroll Group	Enroll or wait-list group members to a course.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
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	TRN_GRP_SUBS_GBL	Administer Training, Student Enrollment, Enroll by Group, Subscriptions	View the students who were subscribed to the courses and sessions indicated on the Enroll Group - Employee/ Course Details page.
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 (*PeopleSoft HCM 9.2: 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

### Image: Enroll Group page (1 of 2)

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.

The screenshot shows the 'Enroll Group' page with the following elements:

- Tabs:** 'Enroll Group' (selected) and 'Subscriptions'.
- Search Fields:**
  - \*Group ID: EI001
  - \*Course Code: 2SESS
  - Session Number: (empty)
- Display Fields:**
  - Description: EI001
  - Course Name: 2 Sessions
  - Facility: (empty)
  - Language: (empty)
- Controls:**
  - Group Comments (link)
  - ☐ Prerequisite Checking
  - ☒ Subscribe All
  - Search by Name or ID (link)
  - Refresh Search Fields (button)
  - Load Students (button)
- Footer:**
  - France (country selector)
  - Training Plan Category: Not Specified (dropdown)

### 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.

**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.

**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.

**Image: Enroll Group page (after clicking Load Students)**

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.

The screenshot shows the 'Enroll Group' page with the 'Subscriptions' tab selected. Search filters include Group ID (EI001), Course Code (2SESS), and Session Number. Course details show Description (EI001), Course Name (2 Sessions), Facility, and Language. Options for Prerequisite Checking and Subscribe All are visible. A 'Matching Employees' section states '178 students will be subscribed to course 2SESS'. Below is a 'Student Worksheet' table with columns for Take Student, Student ID, Employment Record, Course Code, Session Number, Start Date, End Date, Already Subscribed, Attendance, and Details. Two rows are shown for students E100 and E101, both enrolled in course 2SESS, with 'Course Waitlist' in the Attendance column.

Take Student	Student ID	Employment Record	Course Code	Session Number	Start Date	End Date	Already Subscribed	Attendance	Details
<input checked="" type="checkbox"/>	E100		0 2SESS				<input type="checkbox"/>	Course Waitlist	Details
<input checked="" type="checkbox"/>	E101		0 2SESS				<input type="checkbox"/>	Course Waitlist	Details

## 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.

<b>Student ID</b>	Displays the employee or nonemployee ID. To display the student's full name, click the Details link.
<b>Course Code</b>	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.
<b>Session Number</b>	<p>Displays the session number in this field if a student's attendance field value is <i>Enrolled</i> or <i>Sessn Wait</i>. You can change the course session without affecting other students in the list.</p> <p>For students with an Attendance field value of <i>Crse Wait</i>, 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 <i>Sessn Wait</i> or <i>Enrolled</i>.</p> <p>If the student has completed the course, the system displays the session number and makes the field unavailable.</p>
<b>Start Date and End Date</b>	If the student's attendance field value is set to <i>Enrolled</i> , <i>Sessn Wait</i> , or <i>Completed</i> , the system populates these fields from the Course Session table and makes them unavailable.
<b>Already Subscribed</b>	<p>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.</p> <p>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.</p> <p>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.</p>
<b>Attendance</b>	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:

*Crse Wait*: 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 *Sessn Wait* 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).

*Sessn Wait*: 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

### Image: Enroll by Group - Subscriptions page (after clicking Load Students)

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.

### 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.

### 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.
- Enroll students automatically.

### Pages Used to Manage Waiting Lists

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Create/Update Course Wait List	COURSE_WAIT_LIST	Administer Training, Student Enrollment, Create/Update Course Wait List, Create/Update 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	COURSE_AUTO_ENROLL	Administer Training, Student Enrollment, Course Session Auto Enrollment, Course Session Auto Enrollment	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

#### Image: Create/Update Course Wait List page

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.

#### 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.



**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

### Image: Course Session Auto Enrollment page

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.

**Course Session Auto Enrollment**

Course K022 Computer Basics: Using a PC Nbr Waiting 0

**Auto-Enrollment**

Session Nbr  Max Students 0

**Attendance** Find | View All First 1 of 1 Last

Student Name	ID	Attendance	Status Date	Waitlist Dt	Sessn	Letter Code
--------------	----	------------	-------------	-------------	-------	-------------

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

### 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

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Reschedule Between Sessions	COURSE_RESCHEDULE	Administer Training, Student Enrollment, Reschedule Between Sessions, Reschedule Between Sessions, Reschedule Between Sessions	Move students between course sessions.

## Reschedule Between Sessions Page

Use the Reschedule Between Sessions page (COURSE\_RESCHEDULE) to move students between course sessions.

## Navigation

Administer Training, Student Enrollment, Reschedule Between Sessions, Reschedule Between Sessions, Reschedule Between Sessions

### Image: Reschedule Between Sessions page

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

### Reschedule Between Sessions

Course K001 Time Management

Attendance Personalize | Find | View All | First 1-4 of 4 Last

Session Nbr	*Status	Status Date	ID	Student Name	Letter
0018	Enrolled ▾	05/15/2002	KU0007	Betty Locherty	CON
0018	Enrolled ▾	05/15/2002	KU0010	Antonio Santos	CON
0018	Session W: ▾	05/15/2002	Z9032	Samantha Carter	
0008	Session W: ▾	06/30/2000	KG0008	Ramina Jones	WTS

#### 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*

#### 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](#)

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## 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

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
SF182	RUNCTL_SF182	Administer Training, Training Reports, SF182, 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.
Course Waiting List	RUNCTL_TRN003	Administer Training, Course Reports, Course Waiting List, Course Waiting List	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 (*PeopleSoft HCM 9.2: Application Fundamentals*)"

"Understanding Profile Management (*PeopleSoft HCM 9.2: Human Resources Manage Profiles*)"

---

## Maintaining Student Training Data

These topics discuss how to:

- Enter or review student and course information.
- Link a student's course information to a demand ID.
- Track and review requested courses.
- Search for competency training.

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 Course Waiting List page or the Student Course 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

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Course Student Enrollment	COURSE_STUDNT_ENRL	Administer Training, Student Enrollment, Enroll in Course, Course Student Enrollment	Review or enter student and course information.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Demand from Budget Training	COURSE_STUDNT_ENR2	Administer Training, Student Enrollment, Enroll in Course, Demand from Budget Training	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	TRN_DIF_ENROLL_SEC	Click the Track Training Hours Details link on the Demand from Budget Training page.	Track training durations for each training type (DIF, Non-DIF).
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	COMP_TRAINING	Workforce Development, Profile Management, Profiles, Review Competency Training, Review Competency 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

### Image: Course Student Enrollment page

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.

**Course Student Enrollment** | Demand from Budget Training

**Enroll in Course**  
**Douglas Lewis** | Person ID KU0001

**Course Information** | Find | View All | First 1 of 1 Last

Course Code: M2005 | Course Title: course with 2000 hours  
 \*Internal/External: Internal | Session Nbr: 0001  
 Start Date: 01/13/2005 | End Date: 03/23/2005  
 Facility: Min 1 | Language: Max 10  
 Nbr Enrolled: 1 | Nbr Waiting: 0  
 Start Time: 8:00AM | End Time: 1:00PM

**Student Information**

☐ Prerequisites Met | Date Needed: | Status Date: 03/23/2005  
 \*Attendance: Enrolled | Training Reason: | Dept ID: ADMIN Pres.  
 Business Unit: GBIBU | Grade: | Letter Code: CON | Letter Dt:  
 Australia

**Study Bank** | Personalize | Find | View All | First 1 of 1 Last

	From Date	To Date	Study hrs/wk	Travel hrs/wk
1	01/13/2005			

**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.

### 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.

<b>Internal/External</b>	Displayed if you entered a course code. If the value isn't displayed, select <i>Internal</i> or <i>External</i> .
<b>Start Date and End Date</b>	If dates and times aren't displayed, enter them.
<b>School Code and School Name</b>	Enter the name of the school if there is no corresponding school code.
<b>Facility, Language, Session Nbr, Min, Max, Nbr Enrolled, and Nbr Waiting (facility, language, session number, minimum students, maximum students, number enrolled, and number waiting)</b>	These fields apply only to course sessions that are administered in house.
<b>Student Information</b>	
<b>Prerequisites Met</b>	Select to indicate that a student has met the required prerequisites or training before enrolling in a course.
<b>Date Needed</b>	Enter the date when the student should have completed this course.
<b>Attendance</b>	<p>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 <i>Completed</i> here or on the Enroll Individually page.</p> <p>If the course isn't administered in house, select an attendance status. The values that you'll use most often are <i>Currently Attending</i> and <i>Completed</i>.</p> <p>If this training course is also in the employee career plan, once the status is <i>Completed</i>, the end date of the course appears in the Completion Date field on the Career Plan Career Training Plan page.</p> <p>See "Reviewing Employee Career Data (<i>PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions</i>)".</p>
<b>Status Date</b>	Initially populated by the system date.
<b>Waitlist Date</b>	Displayed if the value in the Attendance field is <i>Course Waitlist</i> . This field applies only to courses that are administered in house.
<b>Business Unit and Department</b>	<p>These fields identify the business unit and department to which training is billed. You can change the default values.</p> <p>The source of the default values is as follows:</p> <ul style="list-style-type: none"> <li>• If the course is administered in house, the values come from the Enroll Individually page.</li> </ul>

- 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.

**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****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

### Image: Demand from Budget Training page

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.

The screenshot displays the 'Demand from Budget Training' page. At the top, there are tabs for 'Course Student Enrollment' and 'Demand from Budget Training'. Below the tabs, the user 'Douglas Lewis' is identified with 'Person ID KU0001'. The 'Course Information' section shows 'Course Code M2005' (course with 2000 hours) and 'Session Nbr 0001'. The 'Start Date' is 01/13/2005 and the 'End Date' is 03/23/2005. The 'Demand from Budget Training' section includes 'Search Criteria' with checkboxes for 'Population' and 'Catalog', a 'Demand ID' input field, and a dropdown for '\*Training Plan Category' (Not Specified). Below this, there are checkboxes for 'Professionalization Period', 'Training Leave', 'Part Time Course', 'DIF', and 'Out of Working Schedule'. The 'Training Duration' section has two radio buttons: 'Training Duration from Session' (selected) and 'Specify Student Duration'. The 'Time Spent at Training' is set to 20.0 hours.

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.

### 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.

### 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.

### 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.

### 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.

### 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  $\geq$  Duration out of Working Schedule  $\geq$  0.

---

### 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  $\geq$  Session Cut DIF Duration  $\geq$  0. The second column is valid if the Session Cut DIF Duration  $\geq$  Session Cut DIF Duration out of Working schedule  $\geq$  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.

---

### 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.

### 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.

### 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

### Image: Review Competency Training page

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.

Review Competency Training

Competency 0110 Ability to manage own time

Course Training

Course	Course Name	Session	Start Date	End Date	Max Students	Enrolled
K001	Time Management	0005	07/12/2000	07/13/2000	10	0
K001	Time Management	0006	11/08/2000	11/09/2000	10	0

Non Course Training

Media Type	Description

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

### Image: Enroll Individually page showing the federal fields

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.

The screenshot shows the 'Enroll Individually' page with the following sections and fields:

- Course Information:** Course L104, Federal Gov't Orientation, Session Nbr 0022 Active, Start Date 12/04/2000, Start Time 9:00AM, Facility Captl Hill, Language, Min Students 4, Max Students 10, Nbr Enrolled 0, Nbr Waiting 0.
- Prerequisite Checking:** A button labeled 'Prerequisite Checking'.
- Transfer-Course Session Setup:** A link labeled 'Transfer-Course Session Setup'.
- Attendance:** A section with fields for Empl ID, Empl Record, \*Attendance (Training Request Authorized), Training Reason, Letter Code, Status Date (02/08/2013), Date Letter Printed, Grade, and checkboxes for Prerequisites Met and Training Request Required.
- Department:** A section with fields for Business Unit and Department.
- Demand from Budget Training:** A section with Search Criteria (Population, Catalog) and Demand ID.

**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 HCM 9.2: 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

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Student Training History	RUNCTL_TRN020	Administer Training, Training Reports, Student Training History, Student Training History	List the courses and sessions completed by a student. This is a BI Publisher report.
Training Programs	RUNCTL_TRN021	Administer Training, Training Reports, Training Programs, Training Programs	List the training program for an employee. This is an SQR report.



# Tracking Training Costs

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## Understanding Training Cost Tracking

These topics list common elements and discuss student reimbursement processing.

### Common Elements Used to Track Training Cost

<b>Data Override and Override</b>	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.  <b>Note:</b> Once you change the default values on a page, you cannot select the Data Override check box again.  <b>Warning!</b> 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.
<b>EE Qty (employee quantity)</b>	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.
<b>Per Employee Cost</b>	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.
<b>(FRA) Financed Cost, Financing Fund, and Financing Department</b>	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 reimbursable expenses and percentages.
- Track student reimbursements.

**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

<i><b>Page Name</b></i>	<i><b>Definition Name</b></i>	<i><b>Navigation</b></i>	<i><b>Usage</b></i>
Tuition Expense Type	TRN_EXPNS_TYP_GBL	Set Up HCM, Product Related, Enterprise Learning, Tuition Expense Type, Tuition Expense Type	Define the types of training expenses that are reimbursable, define the percentage that is reimbursable, and set up a reimbursable limit.
Maintain Tuition Reimbursement	TRN_TUITION_REIMB	Administer Training, Cost Analysis, Maintain Tuition Reimbursement, Maintain Tuition Reimbursement	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

### Image: Tuition Expense Type page

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.

**Tuition Expense Type**

Tuition Expense Type K01EXPN

**Tuition Expense Details** Find | View All First 1 of 1 Last

\*Effective Date 01/01/1980 \*Status Active

\*Description Books/Supplies

Short Description Books/Supp Cost Type

**Percent Reimbursable**

Work-Related Course 50 Non-Work-Related Course 0

**Reimbursable Limit**

☐ Limited Reimbursement

Amount Currency USD Unit Pers/Hour

**France**

Per Unit Cost Cost Unit Currency 2483 Type

☐ Chargeable ☐ Limited Amount

Limit Amount Currency USD Cost Unit Pers/Hour

**Cost Type**

Select *Direct* or *Indirect*.

## Percent Reimbursable

### 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.

### Limited Reimbursement

Select to limit the amount that the students are reimbursed. The system makes the Amount and Cost Unit fields available.

### 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.

### 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

### Image: Maintain Tuition Reimbursement page

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.

**Maintain Tuition Reimbursement**

Person ID K0G001      Name Rebekah Jones  
 Course Code K012      Course Name Project Management  
 Session Number 0001      Employment Record 0  
 Start Date 02/15/1999      End Date 02/23/1999

Totals		
\$0.00	\$0.00	USD

**Expense**      Personalize | Find | View All | First 1 of 1 Last

Date	Amount								
<table border="1"> <thead> <tr> <th>*Expense Type</th> <th>Description</th> <th>Reimbursement Date</th> <th></th> </tr> </thead> <tbody> <tr> <td>KF001</td> <td>Hotel</td> <td>02/08/2013</td> <td><input type="checkbox"/></td> </tr> </tbody> </table>	*Expense Type	Description	Reimbursement Date		KF001	Hotel	02/08/2013	<input type="checkbox"/>	
*Expense Type	Description	Reimbursement Date							
KF001	Hotel	02/08/2013	<input type="checkbox"/>						

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

### Expense Type

Select an expense type from the types that you created on the Tuition Expense Type page.

## Amount Tab

### 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:

<b>Cost Component</b>	<b>Table</b>
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
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

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Calculate Student Cost	RUNCTL_TRN013	Administer Training, Cost Analysis, Calculate Student Cost, Calculate Student Cost	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.
Maintain Student Costs - Vendor	TRN_EE_SESSN_CST3	Administer Training, Cost Analysis, Maintain Student Costs, Vendor	Review and update the vendor costs resulting from the Compute Student Costs process.
Maintain Student Costs - Facility	TRN_EE_SESSN_CST5	Administer Training, Cost Analysis, Maintain Student Costs, Facility	Review and update the facility costs resulting from the Compute Student Cost process.
Maintain Student Costs - Equipment	TRN_EE_SESSN_CST7	Administer Training, Cost Analysis, Maintain Student Costs, Equipment	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.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
EE Session Cost Summary (employee session cost summary)	RUNCTL_TRN032	Administer Training, Training Reports, EE Session Cost Summary, EE Session Cost Summary	<p>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.</p> <p>You must run the Compute Student Cost process before you run this report.</p> <p>The EE Session Cost Summary job runs two processes to produce the report.</p>

## 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

Image: Calculate Student Cost page

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.

Calculate Student Cost

Run Control ID PSReport ManagerProcess MonitorRun

Report Request Parameters

Budget Period

External Expense RecordTRN\_EXTEXPN\_TBL

Session Selection Criteria

Start Date Between and

☐ Canceled

☐ Completed

☐ Incomplete

☐ No Show

☐ Enrolled

☐ Dropped

Refresh

France

☒ Analytical

☐ 2483 Computations

Course Information

PersonalizeFind1 of 1Last

	*Course Code	*Session Nbr	Description	Last Proc Date	Split	Override	
1					<input checked="" type="checkbox"/>	<input type="checkbox"/>	<div>+ -</div>

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

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 Period 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 criteria available.

When 2483 Computations is selected, those criteria that are unavailable are greyed out .

### Course Information

<b>Course Code</b>	The system displays courses that have completed sessions for the selected budget period only.
<b>Session Nbr (session number)</b>	Select from the list of completed sessions.
<b>Last Proc Date (last process date)</b>	Displays the date that you last ran the Compute Student Cost process for the specified course session and budget.
<b>Split</b>	Select to proceed with the process and populate the Track Student Cost pages with the process calculation results.
<b>Override</b>	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: PeopleSoft 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

### Image: Maintain Student Costs - Vendor page

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.

Salary	Vendor	Facility	Equipment	Instructor	Employee Expense	Session Expense
Person ID KF0001		Name <b>Maurice Berger</b>				
Course Code KF003		Course Name Performance Management				
Session Number 0001		Employment Record 0				
Start Date 09/08/2000		End Date 09/08/2000				
<b>Vendor</b>						
<input type="checkbox"/> Data Override						
Vendor ID		Vendor				
Per Employee Cost		Currency Code USD				
Business Unit FRA01		Department ID 10200				
<div>  France         </div>						
Financed Cost		Currency Code USD				
Financing Fund		Description				
Financing Department						
<input type="checkbox"/> Certified <input type="checkbox"/> Chargeable <input type="checkbox"/> Billed						
Date Entered						
Agreement Date						
Company		Company Name				

Define additional vendor information to be tracked for legal reporting.

#### Certified, Chargeable and Billed,

For legal reports, select any check box that is applicable.

#### 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

#### Image: Maintain Student Costs - Facility page

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.

Salary	Vendor	Facility	Equipment	Instructor	Employee Expense	Session Expense
Person ID		KF0001		Name		Maurice Berger
Course Code		KF003		Course Name		Performance Management
Session Number		0001		Employment Record		0
Start Date		09/08/2000		End Date		09/08/2000
<div>Facility</div> <div>Find   View All First 1 of 1 Last</div>						
<input type="checkbox"/> Data Override						
Vendor		Facility				
Location		Room Code				
Per Employee Cost		Currency Code USD				
Business Unit FRA01		Department ID 10200				
<div>France</div>						
Financed Cost		Currency Code USD				
Financing Fund		Description				
Financing Department		<input type="checkbox"/> Chargeable				

### (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

### Image: Maintain Student Costs - Equipment page

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.

<a href="#">Salary</a>	<a href="#">Vendor</a>	<a href="#">Facility</a>	<a href="#">Equipment</a>	<a href="#">Instructor</a>	<a href="#">Employee Expense</a>	<a href="#">Session Expense</a>
Person ID KF0001		Name <b>Maurice Berger</b>				
Course Code KF003		Course Name Performance Management				
Session Number 0001		Employment Record 0				
Start Date 09/08/2000		End Date 09/08/2000				
<b>Session Equipment/Materials</b> <a href="#">Find</a>   <a href="#">View All</a> First 1 of 1 Last						
<input type="checkbox"/> Data Override						
*Equipment Code		Description				
Per Employee Cost		Currency Code USD				
Per Employee Quantity 1.00						
Business Unit FRA01		Department ID 10200				
France						
Financed Cost		Currency Code USD				
Financing Fund		Description				
Financing Department		<input type="checkbox"/> Chargeable				

## (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

#### Image: Calculate Planned/Real Costs page

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.

### Calculate Planned/Real Costs

Run Control ID PS
Report Manager
Process Monitor
Run

---

#### Report Request Parameters

Budget Period 
Business Unit 
Base Currency

**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: PeopleSoft Process Scheduler*.

**Related Links**

[Creating Global Scenarios](#)

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## Reviewing Training Costs

These topics discuss how to:

- Review training costs.
- Review nonbudgeted training costs.
- Compare budgeted costs to actual costs.

**Pages Used to Review Training Costs**

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Budgeted	TRN_BDGT_ACT_COST	Administer Training, Cost Analysis, Review Costs, Budgeted, Budgeted	Review budgeted costs compared to actual training costs.
Unbudgeted	TRN_NOTBDGT_COST	Administer Training, Cost Analysis, Review Costs, Unbudgeted, Unbudgeted	Review current unbudgeted training costs. Costs can include projected costs without any actual expenditure, if you have not spent the projected amount.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Summary	TRN_CMPSUMMARY_COST	Administer Training, Cost Analysis, Review Costs, Summary, Summary	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

### Image: Budgeted page

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

Budgeted

Budget Period K1999CALYR		Business Unit GBIBU			
Department View ID KFINANCE		Base Currency USD			
Budgeted Cost					
<a href="#">Find</a>   <a href="#">View All</a> First 1-3 of 4 Last					
Department ID 10000		Department Human Resources			
Budgeted Demand	0	Budgeted Duration	0.0	Budgeted Cost	0.000
Projected Demand	0	Projected Duration	0.0	Projected Cost	0.000
Actual Demand	0	Actual Duration	0.0	Actual Cost	0.000
Department ID 11000		Department Information Systems			
Budgeted Demand	0	Budgeted Duration	0.0	Budgeted Cost	0.000
Projected Demand	0	Projected Duration	0.0	Projected Cost	0.000
Actual Demand	0	Actual Duration	0.0	Actual Cost	0.000
Department ID 13000		Department Finance			
Budgeted Demand	11	Budgeted Duration	176.0	Budgeted Cost	0.000
Projected Demand	0	Projected Duration	0.0	Projected Cost	26,456.000
Actual Demand	0	Actual Duration	0.0	Actual Cost	26,456.000
Totals					
Budgeted Demand	11	Budgeted Duration	176.0	Budgeted Cost	0.000
Projected Demand	0	Projected Duration	0.0	Projected Cost	26,456.000
Actual Demand	0	Actual Duration	0.0	Actual Cost	26,456.000

**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

### Image: Unbudgeted page

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

### Image: Summary page

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

Summary

Budget Period K1999CALYR

Business Unit GBIBU

Department View ID KFINANCE

Base Currency USD

From Budget Training

Demand		Duration		Cost	
Budgeted	11	Budgeted	176.0	Budgeted	0.000
Projected	0	Projected	0.0	Projected	26,456.000
Actual	0	Actual	0.0	Actual	26,456.000
% Projected / Budgeted	0.00	% Projected / Budgeted	0.00	% Projected / Budgeted	0.00
% Actual / Projected	0.00	% Actual / Projected	0.00	% Actual / Projected	100.00
% Actual / Budgeted	0.00	% Actual / Budgeted	0.00	% Actual / Budgeted	0.00

From Administer Training

Demand		Duration		Cost	
Projected	7	Projected	81.0	Projected	10,480.000
Actual	7	Actual	81.0	Actual	10,480.000

Totals

Demand		Duration		Cost	
Actual	7	Actual	81.0	Actual	36,936.000
% Projected / Budgeted	63.64	% Projected / Budgeted	46.02	% Projected / Budgeted	0.00
% Actual / Projected	100.00	% Actual / Projected	100.00	% Actual / Projected	100.00
% Actual / Budgeted	63.64	% Actual / Budgeted	46.02	% Actual / Budgeted	0.00

### 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:

<b>Category</b>	<b>Demand</b>	<b>Duration</b>	<b>Cost</b>
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.

<b>Category</b>	<b>Demand</b>	<b>Duration</b>	<b>Cost</b>
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:

<b>Category</b>	<b>Demand</b>	<b>Duration</b>	<b>Cost</b>
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 <i>Completed</i> ).

### 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:

<b>Category</b>	<b>Demand</b>	<b>Duration</b>	<b>Cost</b>
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 <i>Completed</i> ).



<b>Category</b>	<b>Demand</b>	<b>Duration</b>	<b>Cost</b>
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 <i>Completed</i> ).
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

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
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

### Image: Student Ssn Cost Summary FRA page

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.

### Student Ssn Cost Summary FRA

Person ID KF0001  
Course Code KF003  
Session Number 0001  
Start Date 09/08/2000

Name Maurice Berger  
Course Name Performance Management  
Employment Record 0  
End Date 09/08/2000

Currency Code

Session Costs				
		Financed	Company	Chargeable
Provider Cost	0.00	0.00	0.00	0.00
Facility Cost	0.00	0.00	0.00	0.00
Employee Cost	0.00	0.00	0.00	0.00
Instructor Cost	0.00	0.00	0.00	0.00
Expense Cost	0.00	0.00	0.00	0.00
Equipment Cost	0.00	0.00	0.00	0.00
Total	0.00	0.00	0.00	0.00

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:  

$$\text{Company Costs} = \text{Total Costs} - \text{Financed Costs}$$

**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](#)



# (DEU) Tracking Professional Educational Programs for German Employees

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## 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:

- Identify the steps in a training program.
- Group the steps into a training plan.
- Enroll an employee in a plan.
- Track employee progress.

## Pages Used to Identify Steps, Group Steps, and Track Employee Progress

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Steps DEU	IPE_STEP_TABLE	Set Up HCM, Product Related, Enterprise Learning, Steps DEU, Steps DEU	Identify the steps that make up an educational training program.
Plans DEU	IPE_PLAN_TABLE	Set Up HCM, Product Related, Enterprise Learning, Plans DEU, Plans DEU	Group the steps into a training plan.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Internal Education DEU	EE_IPE_PLAN	Administer Training, Result Tracking, Internal Education DEU, Internal Education DEU	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

### Image: Steps DEU page

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.

The screenshot shows the 'Steps DEU' page with the following fields and controls:

- Step ID:** A1
- \*Description:** Compensation
- Short Description:** Comp
- Duration Time:** 1 Days (with a dropdown arrow)
- Theoretical/Practical:** Radio buttons for Theoretical and Practical, with Practical selected.
- Comment:** This is a training course for new hires.

### 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

### Image: Plans DEU page

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.

The screenshot shows the 'Plans DEU' page. At the top, there is a 'Plan ID' field with the value 'P1'. Below it is a '\*Description' field with the value 'Compensation'. Further down is a 'Short Description' field with the value 'Comp'. Below these fields is a table with the following structure:

Step ID	Description	Step Type
<input type="text"/>	<input type="text"/>	<input type="text"/>

At the bottom right of the table, there are '+' and '-' buttons for adding or deleting steps. Above the table, there are navigation controls including 'First', '1 of 1', and 'Last'.

#### 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.

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**Note:** Use the profile type PERSON to enroll employees in German internal training plans.

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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 HCM 9.2: 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.

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**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

<b>Degree</b>	Displays the degree that applies to this training plan.
<b>Date Acquired</b>	Enter the date that the employee acquired the degree.
<b>Plan ID</b>	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.
<b>Step</b>	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

<b>From Date and Thru Date (through date)</b>	Enter when the employee starts and finishes the step.
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# (ESP) Managing Tripartite Foundation Communications

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## 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](http://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*).

## 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.

### Related Links

"Setting Up XML Files (*PeopleSoft HCM 9.2: Human Resources Administer Workforce*)"

## 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 Table (*PeopleSoft HCM 9.2: Human Resources Administer Workforce*) 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 as system data the following XML templates:

<b>XML Template</b>	<b>Description</b>
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.

---

## Defining Tripartite Foundation Data

These topics provide an overview of Tripartite Foundation data and discuss how to:

- Define reduction percentages.
- Define maximum bonus amounts.
- Define private contribution percentages.

To define Tripartite Foundation data, use the FT Setup Data ESP (TRN\_T\_TRI\_DATA\_ESP) component.

## 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.

We deliver 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	Navigation	Usage
Reduction Percentages	TRN_T_DATA1_ESP	Set Up HCM, Product Related, Enterprise Learning, FT Setup Data ESP, Reduction Percentages	Define reduction percentages.
Maximum Bonus Amount	TRN_T_DATA2_ESP	Set Up HCM, Product Related, Enterprise Learning, FT Setup Data ESP, Maximum Bonus Amount	Define maximum bonus amounts.
Private Contribution	TRN_T_DATA3_ESP	Set Up HCM, Product Related, Enterprise Learning, FT Setup Data ESP, Private Contribution	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

#### Image: Reduction Percentages page

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.

The screenshot displays the 'Reduction Percentages' page. At the top, there are tabs for 'Reduction Percentages', 'Maximum Bonus Amount', and 'Private Contribution'. Below the tabs, the 'Tripartite Data' section includes a 'Find | View All' button, a 'First' button, a '1 of 1' indicator, and a 'Last' button. The 'Effective Date' is set to '01/01/2007' and the 'Status' is 'Active'. The main form area is titled 'Reduction Percentages' and contains the following fields:

- Average Bonus by worker:** A text field containing '65.00'.
- Currency Code:** A dropdown menu showing 'EUR'.

Below these fields is an 'Additional Data' table with the following structure:

Minimum Workers	Maximum Workers	Current Percent		
6	10	100.00	+	-
10	49	75.00	+	-
50	249	60.00	+	-
250		50.00	+	-

#### 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.

---

**Note:** PeopleSoft HR delivers this page populated with values based on current Spanish regulations.

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## 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

**Image: Maximum Bonus Amount page**

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.

The screenshot shows the 'Maximum Bonus Amount' page with the following data:

Method Type	Basic Level Amount	High Level Amount	Currency
Presential	9.00	13.00	EUR
Long Distance	5.50	5.50	EUR
Internet	7.50	7.50	EUR

Use this page to enter maximum bonus amounts for each training method type.

**Method Type**

Enter the method of training delivery. Valid values are: *Presential*, *Long Distance*, and *Internet*.

**Basic Level Amount**

Enter the basic level maximum amount.

**High Level Amount**

Enter the high level maximum amount.

---

**Note:** PeopleSoft HR delivers this page populated with values based on current Spanish regulations.

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## 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

### Image: Private Contribution page

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.

The screenshot shows the 'Private Contribution' tab selected. The page title is 'Tripartite Data'. The 'Effective Date' is '01/01/2007' and the 'Status' is 'Active'. The main section is 'Minimum Percentages'. Below it is a table titled 'Additional Data' with the following columns: 'Minimum Workers', 'Maximum Workers', and 'Current Percent'. The table contains five rows of data:

Minimum Workers	Maximum Workers	Current Percent
1	5	0.00
6	9	5.00
10	49	10.00
50	249	20.00
250		40.00

Use this page to enter the minimum percentages used to calculate the private contribution of companies toward the training of their workers.

#### 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.

## Defining Tripartite Foundation Course and Session Data

These topics discuss how to:

- Define training actions and groups.
- Define session data.
- Define presential training details.
- Define long distance training details.
- Define internet training details.
- Define training costs.

To define Tripartite Foundation course and session data, use the FT Actions and Groups ESP (TRN\_T\_ACTN\_GRP\_ESP) and FT Session Data ESP (TRN\_T\_SESN\_DAT\_ESP) components.

## Pages Used to Define Tripartite Foundation Course and Session Data

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
FT Actions and Groups ESP - Training Actions	TRN_T_ACTN_GRP_ESP	Set Up HCM, Product Related, Enterprise Learning, FT Actions and Groups ESP, Training Actions	Define training actions of Tripartite Foundation, such as training type, level, and means.
FT Actions and Groups ESP - Groups	TRN_T_GROUPS_ESP	Set Up HCM, Product Related, Enterprise Learning, FT Actions and Groups ESP, Groups	Define training groups of Tripartite Foundation.
Session Data Tripartite	TRN_T_SES_DATA_ESP	Administer Training, Define Course/Cost Details, FT Session Data ESP, Session Data Tripartite	Define session data.
Presential	TRN_T_PRE_MTH_ESP	Administer Training, Define Course/Cost Details, FT Session Data ESP, Presential	Define presential training details.
Long Distance	TRN_T_LDIS_MTH_ESP	Administer Training, Define Course/Cost Details, FT Session Data ESP, Long Distance	Define long distance training details.
Internet	TRN_T_INTE_MTH_ESP	Administer Training, Define Course/Cost Details, FT Session Data ESP, Internet	Define internet training details.
Students	TRN_T_SES_STDN_ESP	Administer Training, Define Course/Cost Details, FT Session Data ESP, Students	View students enrolled in the session.
Training Costs	TRN_T_SES_COST_ESP	Administer Training, Define Course/Cost Details, FT Session Data ESP, Training Costs	Define training costs.
Direct Costs	TRN_T_COSTS1_SEC	Select the View Direct Costs link on the Training Costs page.	View direct costs associated with this session.
Associated Costs	TRN_T_COSTS2_SEC	Select the View Associated Costs link on the Training Costs page.	View additional expenses associated with this session.
Personnel Costs	TRN_T_COSTS3_SEC	Select the View Associated Costs link on the Training Costs page.	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

### Image: FT Actions and Groups ESP - Training Actions page

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.

### Action Type

Indicate if this training action is *Internal* or from a *Professional Qualif Catalog* (professional qualified catalog). When you select *Professional Qualif Catalog*, the page displays the Competency Unit, Certificated Code, and RD Number fields.

### Group Actions

Enter a group actions code.

### Level

Indicate if the level of this training action is *Basic* or *High*. The system uses this data to calculate the maximum bonus amounts.

### Action Class

Indicate if the training class action is *Generic* or *Specific*.

### 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 Types fields.

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 from:

- Technological Module:
- RiskPrevention Module:
- Equity Promotion:
- Environment Module:

When you select a check box, the corresponding Hours field appears next to the field.

### URL

Enter the URL for the online training. 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*. 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. This field is available when you select an Access Type of *With Credentials*.

### Comments

Enter comments about the online training. This field is available when you select the On Line check box in the Training Type group box.

### Objectives and Contents

Specify the objectives and content of the training action.

## 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

### Image: FT Actions and Groups ESP - Groups page

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.

Training Action 12000 English Course Status Active

Definition Find | View All First 1 of 1 Last

Effective Date 06/01/2009 Level Basic

Training Group	Description	Means Type	Additional Means
00001	English Course All Day	Company Means	<input type="checkbox"/>
00002	English Course Evening	Org Entity Means	<input type="checkbox"/>
00003	English Course Morning	Company Means	<input checked="" type="checkbox"/>
00004	Other Means	Org Entity Means	<input checked="" type="checkbox"/>

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.

#### Training Group

Enter a training group number.

#### 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

### Image: Session Data Tripartite page

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.

The screenshot shows the 'Session Data Tripartite' page with the following fields and controls:

- Course:** K002 Corporate Orientation
- Session Nbr:** 0001
- Session Status:** Complete
- Start/End Dates:** 04/24/1995 04/26/1995
- \*Training Action:** 12000 English Course
- \*Training Group:** 00002 English Course Evening
- Students/Session:** 4
- Priority Members:** (empty field)
- Notification Reason:** Bonificated Group (dropdown)
- Session Schedule:** Non Working Hours (dropdown)
- Responsible ID:** (empty field with search icon)
- Phone:** (empty field with search icon)
- Comments:** (large text area)
- FT Status:** 1 - Defined / Approved (dropdown)
- Hours:** 24 (text field)
- Training Modes:**
  - ☒ Presential
  - ☒ Long Distance
  - ☒ On Line

#### Training Action

Select a training action to associate the action for the course session for the calculation of costs.

#### Training Group

Select a training group to associate the action for the course session for the calculation of costs.

#### Students/Session

Indicate the number of students participating in the session. You can modify this field.

#### Presential, Long Distance, and On Line

Displays the modes of training associated with the training action. The corresponding page tabs will display for only those items that are selected here.

#### Priority Members

Indicate the number of high priority members attending the session. You can modify this field.

#### Hours

Enter the total session hours. These hours should match the combination of hours from all modes of training entered on the Presential, Long Distance, and Internet pages.

#### Notification Reason

Select to indicate that the company contributes to the training of its workers. Valid values are *Bonificated Group* or *Private Contribution*.

The system covers both the profile of the organizing company and company bonus

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**Note:** Only companies with reductions will have access to the following pages in the FORCEM application: Credit, Private Contribution, High Priority Collectives. Every company (with reduction) must have a private contribution.

---

### FT Status

Indicate the status of the session. When has been completed select a *Finished* value. When you select one of the finished values, the Training Costs page becomes available.

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*.

### Responsible ID

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

### Image: Presential page

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

The screenshot displays the 'Presential' tab within the 'Session Data Tripartite' application. At the top, there are tabs for 'Session Data Tripartite', 'Presential', 'Long Distance', 'Internet', and 'Students'. Below the tabs, session details are shown: Course K002 (Corporate Orientation), Session Nbr 0001, Action 12000 (English Course), Group 00002 (English Course Evening). The 'Schedule' section contains input fields for 'Start Time Morning' (9:00AM), 'End Time Morning', 'Start Time Evening', 'End Time Evening' (5:00PM), and 'Training Hours' (8.00). Below these are checkboxes for days of the week: Monday (checked), Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday. The 'Vendor' section has a search field with a magnifying glass icon. The 'Facility' section has a search field with 'KGFAC1' entered and a magnifying glass icon, with 'Reading - England' displayed below it.

### Schedule

**Start Time Morning and End Time Morning** Enter the start and end times for the morning portion of the training session.

**Start Time Evening and End Time Evening** Enter the start and end times for the evening portion of the training session.

**Training Hours** Enter the total number of hours for the training session.

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.

## 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

### Image: Long Distance page

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.

Session Data Tripartite		Presential		Long Distance		Internet		Students	
Course K002		Corporate Orientation		Session Nbr 0001					
Action 12000		English Course		Group 00002		English Course Evening			
<b>Schedule</b>									
Start Time Morning		9:00AM		End Time Morning					
Start Time Evening				End Time Evening		5:00PM			
Training Hours		8							
<input type="checkbox"/> Monday		<input checked="" type="checkbox"/> Tuesday		<input type="checkbox"/> Wednesday		<input type="checkbox"/> Thursday		<input type="checkbox"/> Friday	
				<input type="checkbox"/> Saturday				<input type="checkbox"/> Sunday	
<b>Vendor</b>									
Vendor									
<b>Facility</b>									
Facility		KGFAC1		Reading - England					
<b>Instructor</b>									
		Personalize   Find   View All    		First		1 of 1		Last	
Instructor		Name		Hours					
1				20.00		+		-	

## Instructor

Enter the IDs of the instructors associated with the long distance session along with the number of hours for which they are scheduled.

**Note:** The remaining fields on this page are identical to those on the [Presential page](#).

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

Image: Internet page

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

Session Data Tripartite

Presential

Long Distance

Internet

Students

Course K002

Corporate Orientation

Session Nbr 0001

Action 12000

English Course

Group 00002

English Course Evening

Schedule

Start Time Morning 9:00AM

End Time Morning

Start Time Evening

End Time Evening 5:00PM

Training Hours 8.00

☐ Monday

☐ Tuesday

☒ Wednesday

☐ Thursday

☐ Friday

☐ Saturday

☐ Sunday

Vendor

eLearning Assistance

Remote Assistance

Instructor

Personalize | Find | View All |

First 1 of 1 Last

Instructor Name

Hours

1

Online Dates

Start Date 04/24/1995

End Date 04/26/1995

**Note:** The remaining fields on this page are identical to those found on the [Presential](#) and [Long Distance](#) pages.

Vendor

**eLearning Assistance and Remote Assistance** Enter the vendor ID for the eLearning or remote assistance.

Online Dates

Enter the start and end dates for the online training.

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

### Image: Students page

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

<a href="#">Session Data Tripartite</a>	<a href="#">Presential</a>	<a href="#">Long Distance</a>	<a href="#">Internet</a>	<a href="#">Students</a>
Course K002 Corporate Orientation		Session Nbr 0001		
Action 12000 English Course		Group 00002 English Course Evening		
<b>Enrolled Students</b>				
Empl ID	Name	Status	Comments	
1 KG0001	Indira Tendulkar	Completed	No data in FT Employee Data	
2 KI0003	Mauro Doria	Completed	No data in FT Employee Data	
3 KI0006	Luisa Della Guardia	Completed	No data in FT Employee Data	
4 KI0010	Mila Fasano	Completed	No data in FT Employee Data	

This page displays those students enrolled in this course session. This enables you to know at any time the status and characteristics of each participant. 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 a *Finished* value on the Session Data Tripartite page.

### Image: Training Costs 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.

## Company Data

### Company

Enter the company incurring the training cost.

If you select the Company check box on the Session Data Tripartite page, the Training Costs page allows you to enter information for only one company. If you select the Organizing Entity check box on the Session Data Tripartite page, the Training Costs page allows you to enter information for multiple companies.

### Students

Enter the number of students who attended the training.

## Costs

Enter the direct costs, associated costs, and personnel costs incurred by the company for the training. You must enter a value in all three fields to make the Calculate button available. The system will total the costs by default, according to data from allocated costs, but you can over-write this information.

### View Direct Costs

Select this link to access the Direct Costs page to view direct costs associated with the session.

### View Associated Costs

Select this link to access the Associated Costs page to view associated costs associated with the session.

**View Personnel Costs**

Select this link to access the Personnel Costs page to view personnel costs associated with the session

**Calculate Costs**

After you click the Calculate button, this group box displays the various costs associated with the training.

**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.

**Related Links**

"Creating FAN File Page (*PeopleSoft HCM 9.2: Global Payroll for Spain*)"

**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.

**Image: Direct 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.



Direct Costs								
<a href="#">Personalize</a>   <a href="#">Find</a>   <a href="#">Print</a>   <a href="#">Refresh</a>								
First 1-2 of 2 Last								
Expenses Type	Description	Cost	Currency	Cost Unit	Cost Per Hour	Hours	Total Costs	Currency
Vendor								USD
Facility	KGFAC1 Reading - England			Hour				USD

[Return](#)

Displays the breakdown of direct costs. 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.

### Image: Associated 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.

Associated Costs								
Associated Costs								
					Personalize	Find	First 1 of 1 Last	
Expenses Type	Description	Per Unit Cost	Currency	Cost Unit	Cost Per Hour	Hours	Total Costs	Currency
Return								

Displays the breakdown of associated costs. 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.

### Image: Personnel 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.

Personnel Costs								
Personnel Costs								
					Personalize	Find	First 1-4 of 4 Last	
Description	Formal Name	Per Unit Cost	Currency	Cost Unit	Cost Per Hour	Hours	Total Costs	Currency
KG0001	Mrs Indira Tendulkar							USD
KI0003	Mauro Doria							USD
KI0006	Luisa Della Guardia							USD
KI0010	Mila Fasano							USD
Return								

Displays the breakdown of personal costs. The system allows for multi-currency calculations.

The unit cost is based on the data of salary costs defined in the training module.

Only those cost of hours are considered according to the employee's standard hours.

## Calculating Tripartite Foundation Training Credit

This topic discusses how to calculate training credit for companies.

To calculate training credit, use the FT Training Plans & Credit ESP (TRN\_T\_SIMU\_CRD\_ESP) component.

## 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 your annual training plans.
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 you training credits.
Bonus Distribution	TRN_T_REDUCTN_SEC	Select the Bonus Distribution link on the Credit Management page.	Enter the distribution of the bonus.

## 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

### Image: Training Plan page

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.

Training Plan | Credit Calculation | Credit Management

Company KE1 Business Institute - Spain Fiscal Code B81473118

Year 2009 01/01/2009 12/31/2009

RLT Report

☒ Reported to RLT

RLT Value Positive

Actions included in Training Plan Personalize | Find | View All | First 1 of 1 Last

Training Action	Description	Status
1 12000	English Course	No Reported

Use this page to record information for communicating training actions.

<b>Company</b>	Displays the company for which you are calculating training credit.
<b>Fiscal Code</b>	Displays the fiscal code associated with the company.
<b>Year</b>	Displays the year for which your are calculating training credit.

## RLT Report

The RLT requires 15 days to issue a report.

<b>Reported to RLT</b>	Identifies that the report has been sent to the RLT.
<b>RLT Value, Discrepancy Date, and Discrepancy Solved in 15 Days</b>	Select <i>Positive</i> , <i>Discrepancy</i> , and <i>No Answer</i> .  When <i>Discrepancy</i> is selected, the Discrepancy Data and Discrepancy Solved in 15 Days fields become available.

## Actions included in Training Plan

<b>Training Action</b>	Enter all training actions associated with a training plan.
<b>Status</b>	Identify the reporting status of the training action. Values are <i>No Reported</i> or <i>Reported</i> .

## 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

### Image: Credit Calculation page

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.

Company Information	
Average Workers Previous Year	239
Professional Training Quota	1300.00
New Company / Work Center	None

Credit Data	
Professional Training Quota	1300.00
Training Credit	780.00
Credit Already Used	0.00
Available Credit	780.00

**Use Global Payroll Plain Spain Data** Select this check box if you have installed Global Payroll for Spain to have the system use the data for reporting.

## Company Information

**Average Workers Previous Year** Enter the average number of workers employed by the company during the year for which you are calculating training credit.

**Professional Training Quota** Enter you company's professional training quota.

**New Company / Work Center** Select to calculate the training credit for a new company. When you select this check box, the Average Workers Previous Year field becomes unavailable and the Hire Workers field becomes available and required for calculation.

Select 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 check box, the Hire Workers field becomes available and required for calculation.

**Calculate** This button is available when you select *None* in the New Company / Work Center field.

Click to calculate the training credit that the company should receive for the year.

**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 for which you are calculating training credit.

## Credit Data

**Professional Training Quote** Indicates the professional training quote deposited by the company in the previous year. You can modify this amount.

**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** Displays the credit to manage, available because of applying appropriate bonuses.

**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.

## Related Links

"Creating FAN File Page (*PeopleSoft HCM 9.2: Global Payroll for Spain*)"

## Credit Management Page

Use the Credit Management page (TRN\_T\_CREDIT\_ESP) to manage you training credits.

### Navigation

Administer Training, Define Course/Cost Details, FT Training Plans & Credit ESP, Credit Management

### Image: Credit Management page

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

Company	KE1	Business Institute - Spain
Year	2009	
Training Credit	780.00	Crdt Used 0.00
Available Credit	780.00	
Target Private Contributn	156.00	Used Private Contributn 0.00
Pending Private Contributn	156.00	

Course	Description	Session Nbr	Training Costs	Cost To Reduce	Max Bonus Amount	Private Contribution	Bonus Distribution
							Bonus Distribution

### Image: Credit Management page: Status tab

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.

Course	Description	Session Nbr	Private Contribution	FT Status

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.

Use the Bonus Distribution link to enter the distribution of the bonus.

## 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.

### Image: Bonus Distribution 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. This sends the distributed bonuses for reporting.

## Setting Up Employees for Tripartite Foundation Reporting

These topics discuss how to:

- Define Tripartite Foundation employee data.
- Enroll employees in training sessions.

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.

## Pages Used to Define Tripartite Foundation Employee Data

Page Name	Definition Name	Navigation	Usage
FT Employee Data ESP	TRN_T_EMPL_DAT_ESP	Administer Training, Define Course/Cost Details, FT Employee Data ESP, FT Employee Data ESP	Define employee data.
Enroll Individually	COURSE_ENROLLMENT	Administer Training, Student Enrollment, Enroll Individually, Enroll Individually	Enroll employees in training sessions.  See <a href="#">Enroll Individually Page</a> .

## 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

### Image: FT Employee Data ESP page

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

The screenshot shows the 'FT Employee Data ESP' page for 'Antonio Rodriguez Salgado' with 'Person ID KE0001'. The 'Employee Data' section includes the following fields and controls:

- \*Effective Date:** 01/01/2009 (with a calendar icon)
- Status:** Active (dropdown menu)
- Functional Area:** Management (dropdown menu)
- Category:** Manager (dropdown menu)
- Education Level:** Major Eng or Bachelor degree (dropdown menu)
- Others Qualifications:** MBA (text area)
- High Priority Member:** ☐ (checkbox)
- Navigation:** Find | View All | First 1 of 1 Last (with navigation icons)

#### Functional Area

Select the employee's functional area. Valid values are: *Administration, Commercial, Maintenance, Management, and Production.*

#### Category

Select an employment category. Valid values are:

- *Manager*
- *Middle Level Manager*
- *No Qualified Worker*
- *Qualified Worker*
- *Technical*

#### 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 high priority member.

**Other Qualifications**

Enter any additional qualifications for the employee.

---

## Generating Tripartite Foundation XML Files

These topics discuss how to print Tripartite XML files.

To generate Tripartite Foundation XML files, use the FT Print XML File ESP (TRN\_T\_RC\_ESP) component.

### Page Used to Generate Tripartite Foundation XML Files

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
FT Print XML File ESP	TRN_T_RC_ESP	Administer Training, Training Reports, FT Print XML File ESP, FT Print XML File 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

#### Image: FT Print XML File ESP page

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.

**FT Print XML File ESP**

Run Control ID 1 Report Manager Process Monitor Run

**Filter Data**

Template Type FT Begin Group. (Org. Entity)

From Date 01/01/1999 To Date 12/31/2000

FT Status 1 - Defined / Approved Search

**Employee Data**

Groups	Course	Description	Session	Training Action	Description	Group	Finished
<input type="checkbox"/>	1						

Select All Deselect All



## Filter Data

### 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

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## 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

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## 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:

<b>Area of Statutory Enhancement</b>	<b>Description</b>
Training Categorization	All courses must be associated with one of the following categories: <ul style="list-style-type: none"><li>• Skills Development.</li><li>• Adaptation to Job Changes.</li><li>• Job Changes.</li></ul>
Professionalization Contract	This contract affects salary calculations and the calculation of exemptions from social contributions.
DIF ( <i>Droit Individuel à la Formation</i> [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:

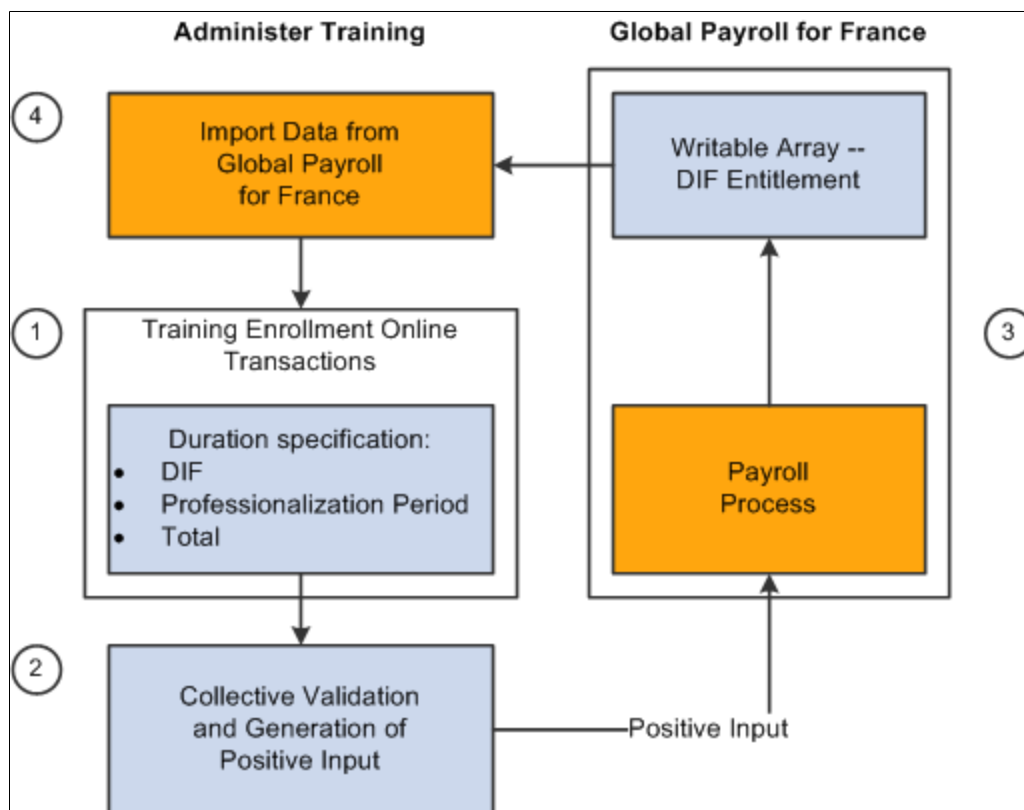
1. Use the Demand from Budget Training and Training Hours Details pages to:
  - a. Indicate when enrollment in a course occurs as part of a professionalization contract.

- 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 Validation (TRN) 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.

**Image: Diagram of the four steps for tracking and processing training data**

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:

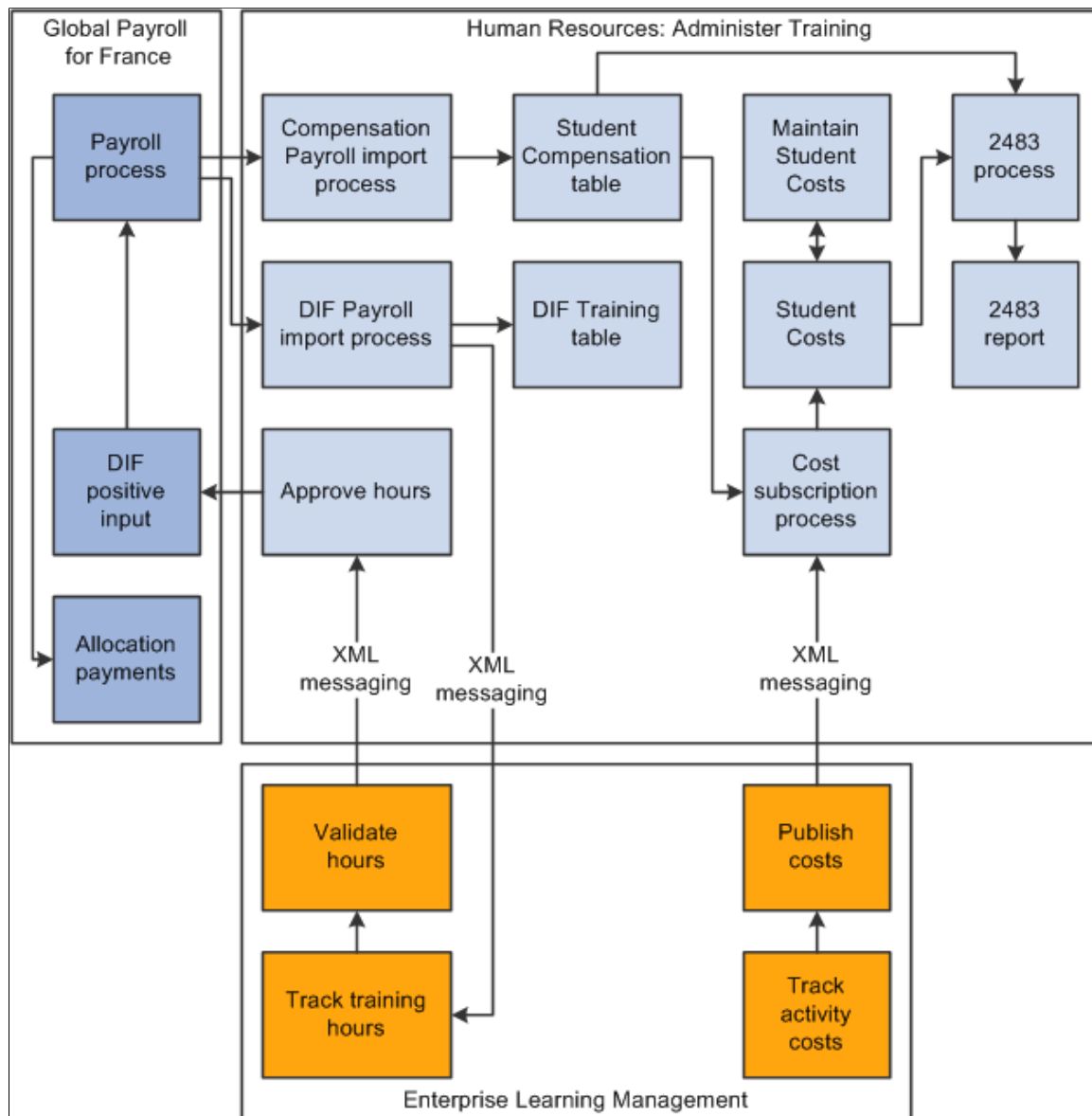
- Learning Management is the application that you use to set up the learning catalog, instructors, vendors, and so on. You also use this application to track learning costs and to manage enrollment and other day-to-day tasks.
- The Administer Training business process compiles information provided by 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.

### Image: Administer Training integration with Learning Management and Global Payroll

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.

<b>Message Name</b>	<b>Message Handler/ Application Class</b>	<b>Records Populated in Learning Management</b>	<b>Explanation</b>
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_TRK HOUR ( 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.

<b>Message Name</b>	<b>Message Handler/ Application Class</b>	<b>Records Populated in Learning Management</b>	<b>Explanation</b>
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 as a training administrator.
- Validate training hours as a payroll administrator.

### Pages Used to Validate Training Hours

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
FRA Training Validation (TRN)	TRN_COL_VALIDATION	Administer Training, Result Tracking, FRA Training Validation (TRN), FRA Training Validation (TRN)	Validate training hours (training administrator view).
FRA Training Validation (GP)	TRN_COL_VALIDATION	Administer Training, Result Tracking, FRA Training Validation (GP), FRA Training Validation (GP)	Validate training hours (payroll administrator view) and send DIF data to the payroll system for processing.

### FRA Training Validation (TRN) Page

Use the FRA Training Validation (TRN) page (TRN\_COL\_VALIDATION) to validate training hours (training administrator view).

## Navigation

Administer Training, Result Tracking, FRA Training Validation (TRN), FRA Training Validation (TRN)







### Image: FRA Training Validation (TRN) page - Dates tab



This example illustrates the fields and controls on the FRA Training Validation (TRN) page - Dates tab. You can find definitions for the fields and controls later on this page.

**FRA Training Validation (TRN)**

Budget Period BP2005      Description budget period for 2005  
 Effective Date 01/01/2005      Thru Date 12/31/2005  
 Business Unit FRA01      Name France Business Unit

**Search Criteria**

Company    
 Establishment ID    
 Course    
 Session Status   
 From Date   To Date    
 Employee ID    
 Session Cut Status

**Training Details**      Personalize | Find | View All |   First 1 of 1 Last

Select	Employee ID	Session Start Date	Session End Date	Session Cut Start Date	Session Cut End Date	*Session Cut Status
<input type="checkbox"/>						Awaiting Review

Select All      Deselect All

     Status Awaiting Review

The FRA Training Validation (TRN) 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 Validation (TRN) 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.

### Company

This filter selects students that have the specified company in their training record.

**Establishment ID**


---

**Note:** Only companies that are part of the business unit can be selected.

---

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.

---

**Course**

This filter selects courses from the training record.

---

**Note:** Only courses with session dates that occur during the budget period can be selected.

---

**Session Status**

Valid values are *Active*, *Canceled*, and *Complete*.

This filter selects course sessions that have the specified attendance status in the training record.

---

**From Date and To Date**

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.

---

**Employee ID**

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.

---

**Session Cut Status**

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.

---

## 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.

### 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.

---

### 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)

### Image: FRA Training Validation (GP) page

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.

**FRA Training Validation (GP)**

Budget Period BP2005      Description budget period for 2005  
 Effective Date 01/01/2005      Thru Date 12/31/2005  
 Business Unit FRA01      Name France Business Unit

**Search Criteria**

Company    
 Establishment ID    
 Course    
 Session Status   
 From Date  To Date    
 Employee ID    
 Pay Group    
 Calendar ID    
 Session Cut Status   
☐ Is Blank  
☐ Is Blank

**Training Details** Personalize | Find | View All | | First 1 of 1 Last

Details	Calendars	Dates	Durations	Course Title	Employment Record	Course	Session Number	Attendance
Select	Employee ID	Name			0			

Select All      Deselect All

By

Status

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:

### 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.

---

### 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.

### 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.

### 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.

---

### 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.



<b>Session Start Date</b>	<p>This field displays the start date of the entire training session.</p> <p>This is the date defined on the Course Session Profile page (Enterprise Learning, Define Course/Cost Details, Course Sessions).</p>
<b>Session End Date</b>	<p>This field displays the end date of the entire training session.</p> <p>This is the date defined on the Course Session Profile page.</p>
<b>Session Cut Start Date</b>	<p>This field displays the session cut start date.</p> <p>This is the date defined on the Location, Instructor page (Enterprise Learning, Define Course/Cost Details, Course Sessions).</p>
<b>Session Cut End Date</b>	<p>This field displays the session cut end date.</p> <p>This is the date defined on the Location, Instructor page.</p>
<b>Session Cut Status</b>	<p>This is the same field described in the section on the Calendars tab.</p>

## 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.

<b>Session Cut Duration</b>	<p>This field displays the duration in hours of the session cut. This information comes from the Demand From Budget Training component (TRN_STUDENT_CRSDT2).</p>
<b>DIF in working Schedule</b>	<p>This field displays the duration in hours entered in the Demand From Budget Training component.</p> <p>This information is sent to the payroll system when the row is approved and saved.</p>
<b>DIF out of working Schedule</b>	<p>This field displays the duration in hours entered in the Demand From Budget Training component.</p> <p>This information is sent to the payroll system when the row is approved and saved.</p>
<b>Out of working Schedule</b>	<p>This field displays the duration in hours for skills development entered in the Demand From Budget Training component.</p> <p>This information is sent to the payroll system when the row is approved and saved.</p>

**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 Validation (TRN) components.

This table lists the *in working hours* DIF entitlement elements for which the system creates positive input:

<b><i>Payroll Element</i></b>	<b><i>Description</i></b>
HRS DIF PEND	<p>When DIF hours within the work schedule are &gt; 0, the system assigns the earning HRS DIF PEND to the payee using positive input.</p> <p>This earning has a calculation rule of Amount. The amount is defined as the formula FOR FM DIF PENDANT.</p>
FOR VR HRS DIF	<p>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.</p> <p>It is populated using a supporting element override.</p>

This table lists the *out of working hours* DIF elements for which the system creates positive input:

<b>Payroll Element</b>	<b>Description</b>
HRS DIF HORS	<p>When DIF hours outside the normal work schedule are &gt; 0, the system assigns the earning HRS DIF HORS to the payee using positive input.</p> <p>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.</p>
FOR VR HRS DIF	<p>This variable stores DIF hours for training that takes place outside of the normal work schedule to process in the current payroll calendar.</p> <p>It is populated using a supporting element override.</p>
FOR VR DT DEB FOR	<p>This variable stores the session cut start date for DIF training that occurs outside of normal work hours.</p> <p>It is populated using a supporting element override.</p>

This table lists the *out of working schedule training hours* elements for which the system creates positive input:

<b>Payroll Element</b>	<b>Description</b>
HRS DEV HORS	<p>When skills development hours outside the normal work schedule are &gt; 0, the system assigns the earning HRS DEV HORS to the payee using positive input.</p> <p>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.</p>
FOR VR DT DEB FOR	<p>This variable stores the session cut start date for skills development training that occurs outside of normal work hours.</p> <p>It is populated using a supporting element override.</p>

## 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

### Image: DIF Payroll Import FRA page

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.

### 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.

---



# (FRA) Producing the French Training Report 2483

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## 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.

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See product documentation for *PeopleSoft Enterprise Learning Management*, “(FRA) Managing French Regulatory Requirements”.

### Related Links

[Understanding Training Costs](#)

[Understanding Student Enrollment Options](#)

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## 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

<i><b>Page Name</b></i>	<i><b>Definition Name</b></i>	<i><b>Navigation</b></i>	<i><b>Usage</b></i>
2483 Group	GROUP_2483_TBL_FRA	Set Up HCM, Product Related, Enterprise Learning, 2483 Indicators FRA, 2483 Group	Review the group setup for the French Training Report 2483.
2483 Indicator	INDIC_2483_TBL_FRA	Set Up HCM, Product Related, Enterprise Learning, 2483 Indicators FRA, 2483 Indicator	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

Image: 2483 Group page

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.

2483 Group

2483 Indicator

Cerfa Number 11168\*14

Cerfa 11168\*14

2483 Group F

\*Description

Training Plan Financing

Short Description

Financing

Comments

\*Number of Columns

1

Descr 1

Total

- 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
	<b>Note:</b> (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.

<b>Group ID</b>	<b>Description</b>
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

### Image: 2483 Indicator page

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.

The screenshot displays the '2483 Indicator' page. At the top, there are two tabs: '2483 Group' and '2483 Indicator'. Below the tabs, the page shows the following fields and controls:

- Cerfa Number:** 11168\*14
- 2483 Group:** F
- \*2483 Indicator:** 11
- \*Description:** Employer Particip. (Trn Plan)
- Short Description:** Particip.
- Comments:** (Empty text area)
- \*Number of Columns:** 1
- Descr 1:** Total
- Navigation:** Find | View All | First | 1 of 18 | Last

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.

These topics discuss how to:

- Enter 2483 report parameters.
- Enter company costs.

## Pages Used to Enter Additional Report Parameters

<i><b>Page Name</b></i>	<i><b>Definition Name</b></i>	<i><b>Navigation</b></i>	<i><b>Usage</b></i>
Trn 2483 Parameters Setup (training 2483 parameters setup)	TRN_2483_PARM	Set Up HCM, Product Related, Enterprise Learning, 2483 Parameters FRA, Trn 2483 Parameters Setup	Enter parameters that are required for the 2483 report. This page is dedicated to one company and one declaring year.
Trn 2483 Company Costs (training 2483 company costs)	TRN_2483_CPNY_COST	Set Up HCM, Product Related, Enterprise Learning, 2483 Parameters FRA, Trn 2483 Company Costs	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

### Image: Trn 2483 Parameters Setup page

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.

Trn 2483 Parameters Setup		Trn 2483 Company Costs	
Company KF1		Business Institute - France	
Declaring Year 2000			
<b>C -Total Compensation</b>		<b>Salary Computation Method</b>	
<input type="checkbox"/> Interface with Payroll System Total Annual Salaries (1) <input type="text"/> Participation Rate (2) <input type="text" value="1.60"/> %		<input type="radio"/> Paid Salary <input type="radio"/> Median <input checked="" type="radio"/> Theoretical	
<b>D- Training Leave Financing</b>			
Participation Rate (3) <input type="text" value="0.20"/> %		OPCA (CIF) payment (5) <input type="text"/>	
<b>E-Prof &amp; DIF Financing</b>			
Participation Rate (7) <input type="text" value="0.50"/> %		OPCA Payment (Prof DIF) (9) <input type="text"/>	
<b>F- Training Plan Financing</b>			
OPCA CIF (DIF) payment (f) <input type="text"/>		OPCA -Training Plan Payment(g) <input type="text"/>	
Subsidy (i) <input type="text"/>			
<b>G-CDD Training Leave Financing</b>			
<input type="checkbox"/> Interface with Payroll System Employer Obligation Rate (18) <input type="text" value="1.00"/> %		CDD Total Annual Salaries (17) <input type="text"/> OPCA CIF Payments (19) <input type="text"/>	
<b>H-Public Revenue Dept Payment</b>			
Regularization Payment (22) <input type="text"/>		Payment/Company Work Council <input type="text"/>	
<input type="checkbox"/> L. 951-8 not fulfilled			

## Group C - Total Compensation

### 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.

### **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

### **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])

### **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

**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

**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

**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

### Image: Trn 2483 Company Costs page

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.

Trn 2483 Parameters Setup | Trn 2483 Company Costs

Company KF1 Business Institute - France  
Declaring Year 2000

**Facility** Find | View All First 1 of 1 Last  
 \*Training Facility \*Room Code Per Unit Cost

**Equipment/Materials** Find | View All First 1 of 1 Last  
 \*Training Facility \*Equip Code Per Unit Cost

**Expenses** Find | View All First 1 of 1 Last  
 \*Tuition Expense Type Per Unit Cost

Select All Deselect All

**Instructor/Training Staff** Personalize | Find | First 1 of 1 Last

Empl ID	Empl Record	Name	Train Full Time Gross Salary	Currency Code	Chargeable
1	0		0.000 USD		<input checked="" type="checkbox"/>
<b>Total</b>			0.000 USD		

**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

### 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

### 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

### Tuition Expense Type

Define miscellaneous expenses that are associated with a training session.

## Instructor/Training Staff

### 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.

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## Running the Report Process and Reviewing Results

These topics discuss how to:

- Run the Compute Training Report (DEC2483) process.
- Review and edit process results.

## Pages Used to Run the Report Process and Review Results

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Compute 2483 FRA	RUNCTL_DEC2483	Administer Training, Training Reports, Compute 2483 FRA, Compute 2483 FRA	Run the Compute Training Report 2483 process.



Page Name	Definition Name	Navigation	Usage
Edit 2483 FRA	EDIT_2483_FRA	Administer Training, Training Reports, Edit 2483 FRA, 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

### Image: Compute 2483 FRA page

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.

### 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.

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**Warning!** This process will override any previous results. You may lose any modifications that you made manually

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See product documentation for *PeopleTools: Application Engine* and *PeopleTools: PeopleSoft 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.

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**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.

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### Related Links

[Entering Additional Report Parameters](#)

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## 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 Crystal report.

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**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.

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## Page Used to Run the Report

<i><b>Page Name</b></i>	<i><b>Definition Name</b></i>	<i><b>Navigation</b></i>	<i><b>Usage</b></i>
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.



# (MEX) Running Mexican Training Reports

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## 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 HCM 9.2: Human Resources Monitor Health and Safety*)"

## Common Elements Used to Run Mexican Training Reports

<b>Mixed Committee</b>	When entering information for training reports, the Mixed Committee you select must be of a Training type.
<b>Contract Type</b>	Specify the contract type by selecting <i>Individual</i> , <i>Collective</i> , or <i>Law</i> .
<b>Plan Type</b>	Select the type of training program or course that you want to generate the report for.

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## 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

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
STPS DC-1 Format MEX	RUNCTL_STP001	Administer Training, Training Reports, STPS DC-1 Format MEX, STPS DC-1 Format MEX	Run the MXSTPP001 (format) and MXS TP—2 (reverse) reports.
STPS DC-2 Format MEX	RUNCTL_STP003	Administer Training, Training Reports, STPS DC-2 Format MEX, STPS DC-2 Format MEX	Run the MXSTP003 (format) and MXSTP004 (reverse) reports.
STPS DC-2B Format MEX	RUNCTL_STP005	Administer Training, Training Reports, STPS DC-2B Format MEX, STPS DC-2B Format MEX	Run the (MEX) DC-2B Training and Development Registration Application (MXSTP005) reports.
STPS DC-3 Format MEX	RUNCTL_STP006	Administer Training, Training Reports, STPS DC-3 Format MEX, STPS DC-3 Format MEX	Run the DC 3 Courses/Events Certificates (MXSTP006) reports.
STPS DC-4 Format MEX	RUNCTL_STP007	Administer Training, Training Reports, STPS DC-4 Format MEX, STPS DC-4 Format MEX	Run the MXSTP007 report.
STPS DC-5 Format MEX	RUNCTL_STP008	Administer Training, Training Reports, STPS DC-5 Format MEX, STPS DC-5 Format MEX	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

### Image: STPS DC-1 Format MEX page

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.

The screenshot displays the 'STPS DC-1 Format MEX' page. At the top, there is a title 'STPS DC-1 Format MEX' in blue. Below the title, there are three links: 'Run Control ID PF', 'Report Manager', and 'Process Monitor', followed by a yellow 'Run' button. The main content area is divided into two sections. The first section, titled 'Report Parameters', contains three input fields: '\*Company', 'Establishment ID', and 'Mixed Committee', each with a magnifying glass icon. The second section, titled 'Contract Type', contains three radio button options: 'Individual', 'Collective', and 'Law'. The 'Law' option is selected.

## 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

### Image: STPS DC-2 Format MEX page

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.

The screenshot displays the 'STPS DC-2 Format MEX' page. At the top, there are tabs for 'Run Control ID PS', 'Report Manager', and 'Process Monitor', along with a 'Run' button. Below this is the 'Report Parameters' section, which includes fields for '\*Company' (with a search icon), 'Establishment ID' (with a search icon), 'Mixed Committee' (with a search icon), 'Contract Date' (with a calendar icon), 'Begin Date' (with a calendar icon), 'Plan Phases' (a text input), and 'End Date' (with a calendar icon). There is also a checked checkbox for 'Print Address'. Below the parameters is the 'Contract Type' section with radio buttons for 'Individual', 'Collective', and 'Law' (which is selected). The 'Modality' section has checkboxes for 'Specific Company PlansProg', 'Common Company PlansProg', and 'Gen System Branch (Wage Act)'. The 'Training Plan Objectives' section features a table with five rows, each with a 'Training Plan Obj Priority' dropdown menu.

#### 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.

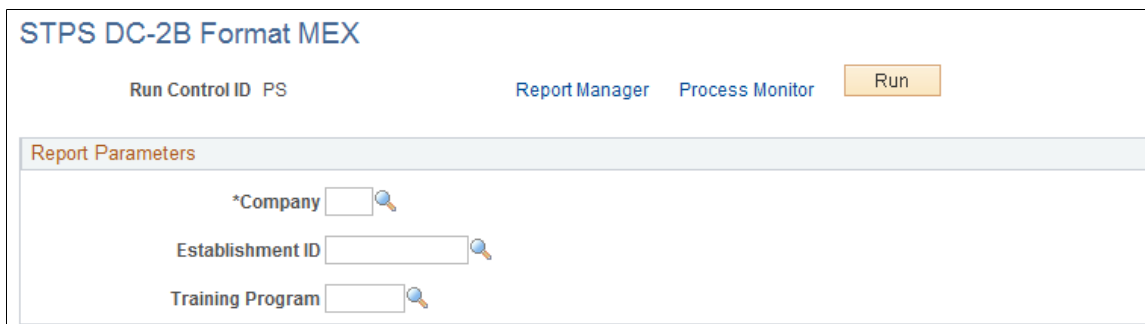


## Navigation

Administer Training, Training Reports, STPS DC-2B Format MEX, STPS DC-2B Format MEX

### Image: STPS DC-2B Format MEX page

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.



STPS DC-2B Format MEX

Run Control ID PS      Report Manager      Process Monitor      Run

Report Parameters

\*Company

Establishment ID

Training Program

**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

### Image: STPS DC-3 Format MEX page

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.

#### Employee Representative Name

Enter the name of the employee representative who is on the Mixed Committee.

#### From Emplid and To Emplid

Enter the range of employee numbers for whom this training is being provided.

#### 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.

#### Course Code

Select the course code. The course description displays next to the course code.

#### Session Nbr

Select the session number for the course being taught.

#### 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

### Image: STPS DC-4 Format MEX page

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.

The screenshot displays the 'STPS DC-4 Format MEX' page. At the top, there is a header with the title 'STPS DC-4 Format MEX' in blue. Below the header, there are three tabs: 'Run Control ID PS', 'Report Manager', and 'Process Monitor'. A yellow 'Run' button is located to the right of these tabs. Below the tabs is a section titled 'Report Parameters' in orange. This section contains several input fields and a checkbox: '\*Company' with a search icon, 'Print Representative Data' with a checkbox, 'Establishment ID' with a search icon, 'Begin Date' with a calendar icon, and 'End Date' with a calendar icon.

## 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

### Image: STPS DC-5 Format MEX page

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.

**STPS DC-5 Format MEX**

Run Control ID PS      Report Manager      Process Monitor      Run

**Report Parameters**

\*Company

Establishment ID

Application Type

☒ Print Instructors

**Plan Type**

☒ Training Program

☐ Course

Training Program

**Course Detail**      Personalize | Find | View All |      First 1 of 1 Last

	Course Code	Description	Session Nbr	Start Date	End Date
1	<input type="text"/>		<input type="text"/>		

+ -

### Application Type

Values are *Initial*, *Instructor Change*, *New Programs*, and *Update Courses*.

### Print Instructors

Select to include instructor names on the report.