
PeopleSoft HCM 9.2: Human Resources Track Faculty Events

March 2013

Trademark Notice

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

License Restrictions Warranty/Consequential Damages Disclaimer

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

Warranty Disclaimer

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

Restricted Rights Notice

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

Hazardous Applications Notice

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Third Party Content, Products, and Services Disclaimer

This software or hardware and documentation may provide access to or information on content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

Alpha and Beta Draft Documentation Notice

If this document is in preproduction status:

This documentation is in preproduction status and is intended for demonstration and preliminary use only. It may not be specific to the hardware on which you are using the software. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to this documentation and will not be responsible for any loss, costs, or damages incurred due to the use of this documentation.

Contents

Preface.....	ix
Understanding the PeopleSoft Online Help and PeopleBooks.....	ix
PeopleSoft Hosted Documentation.....	ix
Locally Installed Help.....	ix
Downloadable PeopleBook PDF Files.....	ix
Common Help Documentation.....	ix
Field and Control Definitions.....	x
Typographical Conventions.....	x
ISO Country and Currency Codes.....	xi
Region and Industry Identifiers.....	xi
Access to Oracle Support.....	xii
Documentation Accessibility.....	xii
Using and Managing the PeopleSoft Online Help.....	xii
PeopleSoft HCM Related Links.....	xii
Contact Us.....	xiii
Follow Us.....	xiii
Chapter 1: Getting Started with Track Faculty Events.....	15
Track Faculty Events Overview.....	15
Track Faculty Events Implementation.....	15
Chapter 2: Understanding Track Faculty Events.....	17
Track Faculty Events Business Process.....	17
Tracking Tenure.....	17
Tracking Events.....	17
Managing Cases.....	18
(CAN) Submitting Statistics for the Your Canada Academic Teaching Surveys.....	18
(AUS) Reporting DETYA for the Australian Higher Education Sector.....	18
Chapter 3: Setting Up Track Faculty Tenure.....	19
Understanding Service Parameters and Accrual Control Tables.....	19
Common Element Used in Service Parameters and Accrual Control Tables.....	19
Understanding Tracking Accrued Service.....	19
Understanding Service Rules.....	20
Setting Up Service Parameters.....	23
Pages Used to Set Up Service Parameters.....	24
Calculation Option Page.....	24
Conversion Options Page.....	26
Date Round Option Page.....	27
Date Conversion Option Page.....	30
Database Alias Page.....	31
Application Trace Page.....	31
Setting Up Service Accrual Control Tables.....	32
Pages Used to Set Up Service Accrual Control Tables.....	33
Understanding Service Accrual Tables.....	35
Calendar Page.....	36
HR Action/Category Page.....	38
Service Definition Page.....	40
Service Include Category Page.....	43
Service Add Periods Rules Page.....	45

Service Adj Future Page.....	46
Service Final Handling Page.....	49
Min/Max Service Rules Page.....	50
Calculation Group Page.....	52
Setting Up Tenure Tracking.....	54
Pages Used to Set Up Tenure Tracking.....	54
Academic Rank Page.....	55
Experience/Credit Codes Page.....	56
Assigning an Employee to Tenure.....	57
Pages Used to Assign an Employee to Tenure.....	58
Understanding Employee Tenure.....	58
Activating Tenure Accrual.....	58
Tenure Data Page.....	59
Prior Experience/Credits Page.....	62
Review Rank/Status History Page.....	63
Review Related Jobs Page.....	64
Running the Tenure Calculation Process.....	66
Pages Used to Run the Tenure Calculation Process.....	66
Understanding the Tenure Calculation Process.....	67
Perform Tenure Calculations Page.....	69
Message Log Page.....	71
View Periodic Results Page.....	72
Review Tenure Calc Summary Page.....	73
Service History Page.....	74
Chapter 4: Tracking Events.....	77
Tracking Faculty Events.....	77
Pages Used to Track Faculty Events.....	77
Common Elements Used to Track Faculty Events.....	78
Activities Page.....	78
Faculty Events -Administrative Posts Page.....	79
Track Events - Administrative Posts Page.....	80
Presentations Page.....	81
Publications Page.....	82
Student Advisement Page.....	83
Teaching Responsibilities Page.....	84
Tracking Committee Information.....	85
Pages Used to Track Committee Information.....	86
Committee Type Page.....	86
Committee Page.....	87
Committee Members Page.....	88
Review Committee Membership Page.....	89
Chapter 5: Managing Cases.....	91
Defining and Reviewing Employee Cases.....	91
Pages Used to Define and Review Employee Cases.....	91
Common Elements Used to Define and Review Employee Cases.....	92
Identify Employee Case Page.....	92
Case Information Page.....	94
Case Progress Page.....	95
Review Case Status Page.....	96
Faculty Events Hist Rpt Page.....	96

Chapter 6: (CAN) Working with the University and College Academic Staff System (UCASS)	
Survey Process.....	99
Understanding the University and College Academic Staff System (UCASS) Survey Business Process.....	99
Setting Up PeopleSoft HCM Control Tables.....	99
Setting Up Track Faculty Events Tables.....	100
Setting Up the University and College Academic Staff System (UCASS) Survey Business Process.....	100
Pages Used to Set Up the Canadian Teaching Surveys Business Process.....	100
Principal Subjects Taught CAN Page.....	101
Faculty Code Stats CAN Page.....	101
Non-Operational Fund Table Page.....	102
Reporting Period Stats CAN Page.....	103
Loading and Modifying Data in the FT Academic Teaching Member Table.....	105
Pages Used to Load and Modify Data in the FT Academic Teaching Member Table.....	105
Understanding the Load FT Teaching Member Data Process.....	105
Load FT Teaching Member Data Page.....	106
Full-Time Member Page.....	107
Loading Data Into the Academic Teaching Survey Tables.....	108
Pages Used to Load Data Into the Academic Teaching Survey Tables.....	108
Understanding the Load Teaching Survey Data Process.....	108
Common Elements Used in the Load Teaching Survey Data Process.....	109
FT Survey Page.....	110
Viewing and Modifying Survey Results.....	111
Pages Used to View and Modify Academic Teaching Survey Results.....	111
Common Elements Used to View and Modify Academic Teaching Survey Results.....	111
FT Survey Part 1 Page.....	112
FT Survey Part 2 Page.....	113
PT Survey Part 1 Page.....	115
PT Survey Part 2 Page.....	116
Creating the Survey Report Flat Files.....	118
Pages Used to Create the Survey Report Flat Files.....	118
Common Elements Used to Create the Survey Report Flat Files.....	118
Verifying Survey Results with Statistics Canada.....	119
Page Used to Verify Survey Results.....	119
Chapter 7: (AUS) Reporting DETYA for the Australian Higher Education Sector.....	121
Understanding DETYA Reporting.....	121
Understanding DETYA Calculations and Reference Dates.....	121
Setting Up DETYA Reporting Codes.....	122
Pages Used to Set Up DETYA Reporting Codes.....	123
Classification Codes AUS Page.....	123
Organization Unit AUS Page.....	124
Generating DETYA Reports Data.....	125
Pages Used to Generate DETYA Reports.....	125

Preface

Understanding the PeopleSoft Online Help and PeopleBooks

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

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.

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.

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>Typographical Convention</i>	<i>Description</i>
Bold	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.

<i>Typographical Convention</i>	<i>Description</i>
{ } (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>.

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.

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](#)

Contact Us

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

Follow Us



Get the latest PeopleSoft updates on Facebook.



Follow PeopleSoft on Twitter@PeopleSoft_Info.

Getting Started with Track Faculty Events

Track Faculty Events Overview

The PeopleSoft HR: Track Faculty Events provides these business processes:

- Track faculty tenure.

Track the tenure eligibility of your faculty using predetermined rules and calendars. Set up service and service accrual parameters, assign employees to tenure, and calculate tenure for employees.

- Track events.

Keep track of a variety of faculty events, such as activities, honors and awards, licenses and certificates, professional and committee memberships, publications, special projects, and teaching responsibilities.

- Manage cases.

Prepare cases and forward them to others for review while maintaining employee confidentiality. Define the purpose of the case, and manage the review process within a case review group by reviewer, reviewer team, process step, dates received and forwarded, recommendations, and final actions.

- Work with the Statistics Canada Academic Teaching Surveys.

Prepare and submit the StatsCan Academic Teaching Survey for your organization, required by Statistics Canada for all Canadian universities and degree-granting institutions.

- Report DETYA (Department of Education, Training, and Youth Affairs) for the Australian Higher Education Sector.

Generate and submit these DETYA required reports: the Full Time and Fractional Staff Report and the Casual Report.

Track Faculty Events 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 documentation, table-loading sequences, data models, and business process maps.

See the product documentation for *PeopleTools: PeopleSoft Setup Manager* and *PeopleSoft HCM 9.2: Application Fundamentals*

Chapter 2

Understanding Track Faculty Events

Track Faculty Events Business Process

Track Faculty Events is a business process in HR that enables you to track tenure, faculty events, and to manage faculty cases and reporting requirements. This topic provides an overview of how to:

- Track tenure.
- Track events.
- Manage cases.
- (CAN) Submit Statistics Canada Academic Teaching surveys.
- (AUS) Report DETYA for the Australian Higher Education sector.

Tracking Tenure

The Track Faculty Events business process enables you to track the tenure eligibility of your faculty using rules and calendars that you establish.

You set up service parameters and service accrual control tables, assign employees to tenure, and calculate tenure for employees. This topic provides complete information to set up tenure tracking.

Tracking Events

The Track Faculty Events business process enables you to track the following faculty events:

- Activities.
- Administrative posts.
- Education, both school and professional training.
- Honors and awards.
- Licenses and certificates.
- Memberships in professional organizations.
- Presentations.
- Publications.
- Special projects.
- Student advisement.

- Teaching responsibilities.
- Committee membership.

Managing Cases

The Track Faculty Events business process enables you to review employee cases. You can easily prepare a case and send it on to others for review while maintaining the confidentiality of the employee. You define the purpose of the case, for example, academic rank review. This feature enables you to manage the case review process within a case review group (such as a department), by reviewer, reviewer team, process step, dates received and forwarded, recommendations, and final actions.

(CAN) Submitting Statistics for the Your Canada Academic Teaching Surveys

The Track Faculty Events business process enables you to prepare and submit the StatsCan (Statistics Canada) Academic Teaching Survey for your organization. Statistics Canada requires that all Canadian universities and degree-granting institutions produce full-time (FT) and part-time (PT) Academic Teaching Survey reports. These reports are a legislative requirement.

The Load Teaching Survey Data – FT Survey process creates an FT Academic Teaching Survey record for each employee who meets certain conditions for full time status. The Load Teaching Survey Data – PT Survey process creates a PT Academic Teaching Survey record for each employee who meets the conditions for part time status. To produce these reports, you must set up some additional HR control tables with Statistics Canada fields listed after each table.

Related Links

[Understanding the University and College Academic Staff System \(UCASS\) Survey Business Process](#)

(AUS) Reporting DETYA for the Australian Higher Education Sector

This Track Faculty Events business process enables you to generate and submit the reports required by Department of Education, Training, and Youth Affairs (DETYA). DETYA requires regular reporting from the Australian Higher Education sector. The required annual reports are the Full Time and Fractional Staff Report and the Casual Report. Noncompliance with these requirements might cost the institution DETYA grants.

Related Links

[Understanding DETYA Reporting](#)

Chapter 3

Setting Up Track Faculty Tenure

Understanding Service Parameters and Accrual Control Tables

This topic discusses:

- Common elements.
- Tracking accrued service.
- Service rules.

Common Element Used in Service Parameters and Accrual Control Tables

Calculation Name

Displays the name of the calculation process. This is the same as the run control ID.

See [Perform Tenure Calculations Page](#).

Understanding Tracking Accrued Service

The Track Faculty Events business process (FACULTY_EVENTS) in PeopleSoft HR offers a tenure tracking feature that enables you to track the tenure eligibility of your faculty using complex rules that you set up.

You can:

- Establish rules and calendars for calculating tenure service based on your organization's specific needs.
- Track tenure-related data and maintain a tenure service clock for employees on tenure track.

To determine total accrued service, the tenure or flexible service calculation processes the changes, such as date of hire, leave of absence, and maternity leave, related to an employee's job status. To determine which time periods count toward service, the system considers the effective date of the job action and checks the rules that you set up in the tenure and flexible service control tables.

Before setting up service rules, set up methods to handle the time duration between the dates that are used for measuring accrued service.

Once you define your duration, date rounding, and date conversion options, you can set up the service accrual control tables to use the Tenure Tracking and Flexible Service Tracking features.

These features use the elapsed-time method to measure the time periods (duration) between job actions. This method calculates the duration between two raw dates by subtracting one date from another.

Understanding Service Rules

The service parameters components enable you to set up different date rules to adjust the effective dates (raw dates) of an employee's job history before the calculation program calculates the elapsed time period between two events (for example, between an employee's date of hire and the date that the employee goes on a leave of absence).

Service parameters are generic across tenure and flexible service calculations. Once you set up a method, you can use it as often as necessary in tenure service and flexible service definitions.

For example, you can use these options when defining a flexible service definition for a seniority rule.

A seniority service rule might state:

- A hire date is effective the first day of the month of hire.
- A leave of absence doesn't count toward service.

A leave is considered effective the first day of the month if its start date is before the 15th.

- A return from leave reinstates service accrual and is considered effective the first day of the month of return.

The service year that you are using has two semesters: August 1, 2005 to December 31, 2005 and January 1, 2006 to May 31, 2006. Your rules specify that each semester counts as 0.50 years of service. You set up HR action categories for hire, leave of absence, and return from leave.

You can set up two date-rounding options. One option rounds the effective date of the history to the first of the month; the other rounds the effective date to the first of the month when the date falls before the fifteenth of the month.

Apply the two rounding options to the HR action categories, using the Service Rules (EG_SERVICE_ELAPSED) component.

Suppose that an employee is hired on August 3, 2005. The employee begins a leave of absence on October 13, 2005 and returns to work on December 1, 2005. This table lists the employee's job history:

Action	Effective Date	Adjusted Effective Date for Service
Hire	08/03/2005	08/01/2005
Leave	10/13/2005	10/01/2005
Return	12/01/2005	12/01/2005

See "Viewing Worker Job History (*PeopleSoft HCM 9.2: Human Resources Administer Workforce*)".

For the semester August 8, 2005 to December 31, 2005 (08/01/2005 to 12/31/2005), the employee accrues service as follows:

- 0.20 years for the period 08/01/2005 to 09/31/2005.
- 0.10 years for the period 12/01/2005 to 12/31/2005.

For the same semester, 0.20 years aren't counted toward accrual for the period 10/09/2005 to 11/30/2005.

To establish service parameters, you must:

1. Establish duration options.
2. Select a calculation method.
3. Select a conversion method.
4. Define date rounding methods.
5. Set up date rounding rules.
6. Set up a date conversion method.
7. Establish a database alias.
8. Turn on the application trace.

Understanding Date Math Methods

A date that is expressed in terms of years, months, and days (YYYY/MM/DD) is a *raw date*. Raw date subtraction subtracts days from days, months from months, and years from years, for example $2005/01/01 - 2003/08/01 = 0001/05/00$, or 1 year, 5 months, and 0 days.

However, consider the subtraction $2005/11/01 - 2002/12/15$. You can't subtract 15 (days) from 1; therefore, you must convert one of the months to days. However, when you change the 11 months to 10, how many days do you carry to the day column?

When you set up raw date subtraction methods, you must choose whether to use the actual number of days or an assumed number of days each month. If you use the actual number of days, the number of days depends on the month in question.

In our example, the tenth month (October) is the most recent full month that you can convert to days. October has 31 days, so $2005/11/01$ becomes $2005/10/32$. You still have to convert 1 year to months to complete the subtraction, but you know that there are always 12 months in a year. As a result, you end up with a date of $2005/22/32$, and the equation is $2005/22/32 - 2003/12/15 = 0002/10/17$ or 2 years, 10 months, and 17 days.

If you assume 30 days per month, $2005/11/01$ becomes $2005/10/31$. After you again convert 1 year to 12 months, you end up with $2005/22/31$. The equation is $2005/22/31 - 2003/12/15 = 0002/10/16$ or 2 years, 10 months, and 16 days.

Setting Decimal to Raw Date Conversion Option

Set up a date conversion option that corresponds to a duration option. This date math should be the same in calculating the service amount and converting the amount to a different display format.

The conversion methods use Months – 1 and Days – 1 instead of just months and days. This represents the number of whole months and days. For example, in the sample date 06/6/06, you're only six days into the sixth month (June). Therefore, the last whole month is the fifth month (May). The Days – 1 component discounts the present day, ensuring that 01/01/06 becomes 2006.0000, and vice versa.

The conversion methods illustrate the conversion from a raw date to a decimal date, but for flexible service conversion, use the rules to reverse the conversion from a decimal date to a raw date.

For example, suppose that an employee has accrued 5.25 years of service. If you assume 30 days a month and 360 days a year, and you are using two decimal places, either conversion method converts this amount to the years/months/days format: 05 years, 03 months, and 0 days.

Setting Up Date Round Options

Employees accrue or do not accrue flexible service or tenure service depending on their employment status. Status changes are reflected in the employee's action and reason history in the PeopleSoft HR job history records: hires, leaves, returns from leave, terminations, and any other action or reason codes that you select.

Because of differences in the rules for different employee groups, you may need to adjust the effective date, depending on the type of job status change. For example, suppose that your organization allows employees to accrue service beginning the first of the month if they are hired before the fifteenth of the month. You can set up a date round option to round the effective date of hire to the first of the month for all employees who are hired before the fifteenth.

To create a rounding rule, set up all three parts of the rule: the rounding day, the rounding rule, and the rounding period.

<i>Rounding Day</i>	<i>Rounding Rule</i>	<i>Rounding Period</i>
First day of	Next	Month
Last day of	Previous	Month

Establishing Duration Options

In tenure and flexible service tracking, the duration option is the method used for calculating the period of time between two action events, such as a date of hire and a leave of absence. The system calculates a duration by subtracting the earlier date from the later date using raw date subtraction. The remainder is the duration.

After performing the raw date subtraction and arriving at a duration, the system converts the duration to decimals. When you convert raw dates and durations to decimal equivalents, you convert months and days to partial years. There are several ways to do this, depending on the decimal conversion assumptions and the decimal conversion method that you select:

- Setting raw date subtraction parameters.

As in our earlier discussion of raw date subtraction, you convert months to days to perform subtractions where the smaller (earlier) date has fewer days than the larger (later) date, for example 2005/11/01 – 2002/12/15.

On the Calculation Option page, you convert the month by selecting either Actual Days Per Month or Assumed Days Per Month:

- If you select Actual Days Per Month, the number of days depends on the month in question. In this case, the tenth month (October) is the most recent full month that you can convert to days. October has 31 days, so 2005/11/01 becomes 2005/10/32.
- If you select Assumed Days Per Month, enter a fixed number of days in the adjacent field. The system uses this number regardless of the month in question.

- Choosing rounding methods.

Using raw date subtraction, round your dates before calculating the duration.

You round dates by specifying the parameters in the Month Round Rule and Day Round Rule group boxes on the Calculation Option page. For raw date subtraction, the month and day portions of the labels tell you which group box to use. For example, to round days to months, use the Day Round Rule group box.

To round *up* only, select Round Up if Periods > (round up if periods are greater than) and enter the threshold number of periods when the system should start rounding up. For example, you could round days up to a full month after 25 days. To round up or down, select Round Up if Periods > Else Round Down and enter the number of periods. If you don't want to round the duration at all, select None.

Important! These rounding options operate on the duration endpoint dates; that is, the dates are rounded before the system performs raw date subtraction.

- Rounding decimal dates and durations.

The month conversion rules and year conversion rules that you select on the Conversion Options page perform rounding operations during your duration processing. For raw date subtraction, the system uses these settings to round the final duration result.

The settings work the same way, regardless of the value that you are rounding. Select Up to round to the next month or year, Down to round to the previous month or year, or Near to round to the closer of the two rounded values. Select None to avoid rounding.

To round the endpoints for the raw date method, use the rounding rules on the Conversion Options page.

Setting Up Service Parameters

To set up service parameters, use the Duration Option (EG_DURATION_OPTS), Date Round Option (EG_DATE_ROUNDING), Date Conversion Option (EG_DATE_CONVERSION), Database Alias (EG_DB_ALIAS), and Application Trace (EG_APPLICATION_TRACE) components.

This topic discusses how to:

- Select a calculation method.
- Select a conversion method.
- Set up date rounding rules.
- Set up a date conversion method.
- Set up a database alias.
- Turn on the application trace.

Pages Used to Set Up Service Parameters

Page Name	Definition Name	Navigation	Usage
Calculation Option	EG_AGEALC_PERIOD	Set Up HCM, Product Related, Workforce Administration, Flexible Service EG, Service Rules, Duration Option, Calculation Option	Select a calculation method and set the parameters that are associated with that method.
Conversion Options	EG_AGEALC_PARMS	Set Up HCM, Product Related, Workforce Administration, Flexible Service EG, Service Rules, Duration Option, Conversion Options	Select a method for converting raw dates to decimal dates. The flexible service and tenure service processes use the conversion method after performing the subtraction.
Date Round Option	EG_DATE_ROUND	Set Up HCM, Product Related, Workforce Administration, Flexible Service EG, Service Rules, Date Round Option, Date Round Option	Set up date rounding rules.
Date Conversion Option	EG_DATE_CONV	Set Up HCM, Product Related, Workforce Administration, Flexible Service EG, Service Rules, Date Conversion Option, Date Conversion Option	Set up a date conversion method.
Database Alias	EG_ALIAS_ENTRY	Set Up HCM, Product Related, Workforce Administration, Flexible Service EG, Service Variables, Database Alias, Database Alias	Set up an event date alias for referencing the Effective Date field on the Job table.
Application Trace	EG_AUDIT_PNL	Set Up HCM, Product Related, Workforce Administration, Flexible Service EG, Service Rules, Application Trace, Application Trace	Turn on the application trace to provide a way to audit an application.

Calculation Option Page

Use the Calculation Option page (EG_AGEALC_PERIOD) to select a calculation method and set the parameters that are associated with that method.

Navigation

Set Up HCM, Product Related, Workforce Administration, Flexible Service EG, Service Rules, Duration Option, Calculation Option

Image: Calculation Option page

This example illustrates the fields and controls on the Calculation Option page.

Raw Date Subtraction

This option is selected by default.

Actual Days Per Month

Select to have the system calculate duration using actual days in each month.

Assumed Days Per Month

Select to have the system assume that there are a certain number of days in each month. Enter the assumed number of days in the field next to this option.

Note: Select Assumed Days Per Month to avoid possible rounding issues.

Month Round Rule

Round Up if Periods > (in Months)

Select to round up when the period is greater than the number of months that you specify.

Round Up if Periods > Else Round Down

Select to round up when the period is greater than the number of months that you specify and round down when the period is equal to or less than the number of months that you specify.

None

Select to avoid rounding.

Day Round Rule

Round Up if Periods > (in Days)

Select to round up when the period is greater than the number of days that you specify.

Round Up if Periods > Else Round Down

Select to round up when the period is greater than the number of days that you specify and round down when it is equal to or less than the number of days that you specify.

None

Select to avoid rounding.

Related Links

[Understanding Service Rules](#)

[Conversion Options Page](#)

Conversion Options Page

Use the Conversion Options page (EG_AGEALC_PARMS) to select a method for converting raw dates to decimal dates.

The flexible service and tenure service processes use the conversion method after performing the subtraction.

Navigation

Set Up HCM, Product Related, Workforce Administration, Flexible Service EG, Service Rules, Duration Option, Conversion Options

Image: Conversion Options page

This example illustrates the fields and controls on the Conversion Options page.

Calculation Option Conversion Options

Duration Option Name: ACAD10 Description: Academic 10-month Calendar Opt

Decimal Conversion Assumptions

*Days Per Month: 30 Number of Decimal Places: 2

*Days Per Year: 300.00

Decimal Conversion Method

☒ Yrs + ((Months * Days/Mth) + Days)/(Days/Yr)

Conversion

Date Tables
Yrs + (Months/12) + Days /

Month Conversion Rules

☐ Up ☐ Down ☐ Near ☒ None

Year Conversion Rules

☐ Up ☐ Down ☐ Near ☒ None

Decimal Conversion Assumptions**Days Per Month**

Enter the number of days per month that you want the system to assume in converting raw dates to decimals.

Days Per Year

Enter the number of days per year that you want the system to assume in converting raw dates to decimals.

Number of Decimal Places

Specify a number of places to round decimals for all points in the conversion process.

Note: The number of decimal spaces that you specify here is used for the internal conversion from raw date to decimal date in the background calculation process. The final service amount that is calculated for each computational period in the tenure and flexible service calculation processes is rounded to two decimal places.

Decimal Conversion Method

The system supports one decimal conversion formula:

$$Yrs + ((Months \times Days/Mth) + Days) / (Days/Yr)$$

The formula converts the months to days, adds this to the remaining days, and then converts the total days to years to calculate the decimal portion of the duration. This is then added to the years to find the total duration.

In this case, you have to specify the value in the assumed Days Per Month and the assumed Days Per Year fields.

Month Conversion Rules

Up, Down, Near, or None

Select one as the rule for converting months.

Year Conversion Rules

Up, Down, Near, or None

Select one as the rule for converting years.

Date Round Option Page

Use the Date Round Option page (EG_DATE_ROUND) to set up date rounding rules.

Navigation

Set Up HCM, Product Related, Workforce Administration, Flexible Service EG, Service Rules, Date Round Option, Date Round Option

Image: Date Round Option page

This example illustrates the fields and controls on the Date Round Option page.

Date Round Option

Date Rounding Name: ACAD10 *Description: 1st day of comp. period

Date Type

☒ Raw Date

Rounding Day

☒ First Day of Period (Rounding Period) ☐ Last Day of Period

Rounding Period

☐ Calendar Month ☐ Calendar Year
(as defined in the calendar)

Rounding Rule

☒ Coincident ☐ Next Following
☐ Coincident with or Previous ☐ First Previous
☐ Up if Day/Month => Threshold Nbr: ☐ Up if =>, else down
☐ Near (Note: Rule based on selected Rounding Period)

Date Type

Raw Date is the default for calculating tenure and flexible service.

Rounding Day

Select whether to round to the first day of the period or the last day of the period.

When you round to the last day of the period, you don't have to specify your rounding rule. The date is always rounded to the last day of the current period. For example, if you round to the last day of the calendar month, August 3, 2001 becomes August 31, 2001.

However, if you round to the first day of a period, you can round to the next, the coincident (with) or next, the previous, the coincident (with) or previous, or the near (nearest) rounding day.

Rounding Period

Select Calendar Month or Calendar Year. For example, when managing job history records in tenure service and flexible service calculation, select Calendar Month.

Rounding Rule

Make your rounding dependent upon a threshold number of days in the month or a threshold number of months in the year by selecting Up if Day/Month => (up if day or month is equal to or greater than) or

Up if Day/Month => Else Down. Both options round up after a threshold number of days (if the rounding period is months) or months (if the rounding period is year). However, the first option doesn't round dates that are below the threshold, whereas the second option rounds down.

These tables illustrate how each of these options works. In all cases, assume that you are rounding to the first of the month.

<i>Rounding Rule</i>	<i>Base Date</i>	<i>Rounded Date</i>
Coincident (with) or Next Following	05/01/2005	05/01/2005
Coincident (with) or Next Following	05/02/2005	06/01/2005
Next Following	05/01/2005	06/01/2005
Coincident (with) or First Previous	05/01/2005	05/01/2005
First Previous	05/01/2005	04/01/2005
First Previous	05/02/2005	05/02/2005
Near	05/03/2005	05/01/2005

<i>Threshold Rounding Rule</i>	<i>Base Date</i>	<i>Threshold</i>	<i>Rounded Date</i>
Round Up if . . .	05/17/2005	15	06/01/2005
Round Up if . . . Else Down	05/17/2005	15	06/01/2005
Round Up if . . .	05/17/2005	20	05/17/2005
Round Up if . . . Else Round Down	05/17/2005	20	05/01/2005

Select a rounding rule from the following options:

Coincident or Next

Next

Coincident or Previous

Previous

Up if Day/Month =>

Up if Day/Month => Else Down

Near

Note: If you selected Last Day of Period in the Rounding Day group box, the Rounding Rule group box is unavailable for entry.

Related Links

[Service Include Category Page](#)

Date Conversion Option Page

Use the Date Conversion Option page (EG_DATE_CONV) to set up a date conversion method.

Navigation

Set Up HCM, Product Related, Workforce Administration, Flexible Service EG, Service Rules, Date Conversion Option, Date Conversion Option

Image: Date Conversion Option page

This example illustrates the fields and controls on the Date Conversion Option page.

Date Conversion Option

Definition Name: ACAD Description: Academic 10 month

Option Type

☒ Decimal Conversion

Assumptions

Days Per Month: 30 Days Per Year: 300.00 Decimal Places: 2

Conversion Method

☒ $\text{Yrs} + ((\text{Months} - 1 * (\text{Days}/\text{Mth})) + \text{Days} - 1) / (\text{Days}/\text{Yr})$

☐ $\text{Yrs} + (\text{Months} - 1)/12 + (\text{Days} - 1) / (\text{Days}/\text{Yr})$

Note: This conversion option is required only for calculating flexible service. It isn't available for tenure.

Option Type

Decimal Conversion is the default.

Assumptions

Days Per Month

Enter the number of days per month that you want the system to assume when performing conversions.

Days Per Year

Enter the number of days per year that you want the system to assume when performing conversions.

Decimal Places

Enter the number of decimal places that you want the system to use in the final decimal figure.

Conversion Method

Select one of the two formula methods:

$$Yrs + (Months - 1 * (Days / Mth) + Days - 1) / (Days / Yr)$$

$$Yrs + (Months - 1) / 12 + (Days - 1) / (Days / Yr)$$

Related Links

[Understanding Service Rules](#)

Database Alias Page

Use the Database Alias page (EG_ALIAS_ENTRY) to set up an event date alias for referencing the Effective Date field on the Job table.

Navigation

Set Up HCM, Product Related, Workforce Administration, Flexible Service EG, Service Variables, Database Alias, Database Alias

Image: Database Alias page

This example illustrates the fields and controls on the Database Alias page.

The screenshot shows the 'Database Alias' page with the following fields and values:

- Database Alias Name:** EMPL_TYPE
- *Description:** Employee Type
- PeopleSoft Table:** ☒
- Record (Table) Name:** JOB
- Field Name:** EMPL_TYPE
- Table Key:** ED (with a small box around the text 'ED') and the text 'Employee ID & Effective Date' to its right.

Database Alias Name	Enter a field value to create a database alias for referencing the Effective Date field on the Job Table.
PeopleSoft Table	Select this check box to create the table in PeopleSoft format.
Record (Table) Name	Enter the PeopleSoft record that contains the field you want to use.
Field Name	Enter the field name (must be a field present on the Record Name)
Table Key	Enter the code for the table key.

Application Trace Page

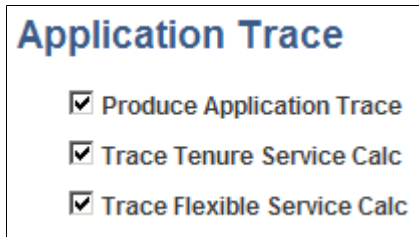
Use the Application Trace page (EG_AUDIT_PNL) to turn on the application trace to provide a way to audit an application.

Navigation

Set Up HCM, Product Related, Workforce Administration, Flexible Service EG, Service Rules, Application Trace, Application Trace

Image: Application Trace page

This example illustrates the fields and controls on the Application Trace page.



Setting the application trace is useful during the implementation phase of the tenure and flexible service calculation process. Don't turn on the trace if you run the calculation on a regular basis. The application trace writes to the Service Audit table (EG_AUDIT_TRACE) and stores the internal calculation details during a calculation run.

Produce Application Trace	Select to turn on the application trace.
Trace Tenure Service Calc (trace tenure service calculations)	Select to trace tenure service calculations.
Trace Flexible Service Calc (track flexible service calculations)	Select to trace flexible service calculations.

Setting Up Service Accrual Control Tables

To set up the service accrual control tables, use the Calendar (EG_FLEX_CALENDAR), Action/Category (EG_ACTION_CATEGORY), Service Rules (EG_SERVICE_ELAPSED), and Calculation Group (EG_CALC_GROUPS) components.

The topic provides an overview of service accrual tables and discusses how to:

- Establish a service calendar.
- Define HR actions and categories.
- Associate a calendar, proration, and date method with a service definition name.
- Define HR service categories.
- Define time adjustments.
- Define HR status history adjustments.
- Set up a final adjustment to the service amount.
- Define adjustments that limit accrual of hours or service units.

- Define service calculation groups.

Pages Used to Set Up Service Accrual Control Tables

Page Name	Definition Name	Navigation	Usage
Calendar	EG_FLXSVC_CALNDR	<ul style="list-style-type: none"> • Set Up HCM, Product Related, Workforce Development, Faculty Events, Calendar, Calendar • Workforce Development, Faculty Events, Define Faculty Events Data, Calendar, Calendar 	Establish service calendars for accruing service years.
HR Action/Category	EG_HR_CATEGORY	<ul style="list-style-type: none"> • Set Up HCM, Product Related, Workforce Development, Faculty Events, HR Action/Category, HR Action/Category • Workforce Development, Faculty Events, Define Faculty Events Data, HR Action/Category, HR Action/Category 	Group similar actions and reasons that count toward service and tenure accrual.
Service Definition	EG_SVC_DEFINITION	<ul style="list-style-type: none"> • Set Up HCM, Product Related, Workforce Development, Faculty Events, Service Rules, Service Definition • Workforce Administration, Flexible Service EG, Define Service Rules, Service Definition • Workforce Development, Faculty Events, Define Faculty Events Data, Service Rules, Service Definition 	Associate a calendar, a proration method, and a date method (for rounding) with the service definition name.

Page Name	Definition Name	Navigation	Usage
Service Include Category	EG_SVC_STATUS	<ul style="list-style-type: none"> Set Up HCM, Product Related, Workforce Development, Faculty Events, Service Rules, Service Include Category Workforce Administration, Flexible Service EG, Define Service Rules, Service Definition, Service Include Category Workforce Development, Faculty Events, Define Faculty Events Data, Service Rules, Service Include Category 	<ul style="list-style-type: none"> Define the HR service categories included in the service accrual process in the selected definition name. Specify the date-rounding options for each HR category that is included on this page.
Service Add Periods Rules	EG_SVC_ADD_PERIODS	<ul style="list-style-type: none"> Set Up HCM, Product Related, Workforce Development, Faculty Events, Service Rules, Service Add Periods Rules Set Up HCM, Product Related, Workforce Development, Faculty Events, Service Rules, Service Add Periods Rules Workforce Development, Faculty Events, Define Faculty Events Data, Service Rules, Service Add Periods Rules 	<ul style="list-style-type: none"> Define the adjustments where the effective date of a status change moves forward. Select the employee records that are affected by the parameters that you set throughout the Service Rules component.
Service Adj Future (service adjust future)	EG_SVC_ADJ	<ul style="list-style-type: none"> Set Up HCM, Product Related, Workforce Development, Faculty Events, Service Rules, Service Adj Future Workforce Administration, Flexible Service EG, Define Service Rules, Service Adj Future Workforce Development, Faculty Events, Define Faculty Events Data, Service Rules, Service Adj Future 	Define human resource status history adjustments that depend on future changes in status.

Page Name	Definition Name	Navigation	Usage
Service Final Handling	EG_SVC_FINAL_RND	<ul style="list-style-type: none"> Set Up HCM, Product Related, Workforce Development, Faculty Events, Service Rules, Service Final Handling Workforce Administration, Flexible Service EG, Define Service Rules, Service Final Handling Workforce Development, Faculty Events, Define Faculty Events Data, Service Rules, Service Final Handling 	Set up final adjustments to the service amount.
Min/Max Service Rules (minimum and maximum service rules)	EG_SVC_MIN_MAX_SVC	<ul style="list-style-type: none"> Set Up HCM, Product Related, Workforce Development, Faculty Events, Service Rules, Min/Max Service Rules Workforce Administration, Flexible Service EG, Define Service Rules, Min/Max Service Rules Workforce Development, Faculty Events, Define Faculty Events Data, Service Rules, Min/Max Service Rules 	Define adjustments that limit the number of hours or service units that can be accrued within a specific period of time.
Calculation Group	EG_CALC_GRP_DFN1	<ul style="list-style-type: none"> Set Up HCM, Product Related, Workforce Development, Faculty Events, Calculation Group Workforce Development, Faculty Events, Define Faculty Events Data, Calculation Group 	Define service calculation groups to group employees who have the same calculation rules applied to their service accrual process.

Understanding Service Accrual Tables

Methods of calculating and tracking employee service and tenure vary among different groups at the same organization and from one organization to the next. Flexible Service AG and Faculty Events provide set up tables where you establish the service rules that best fit your organization. These service rules provide the basis for the flexible service and tenure accrual processing.

You can define your service calendars, establish human resource action and categories to categorize the job action and reason codes that count toward service accrual, and define your date rounding options.

The service rules become part of a definition name that you assign to a service type. The system processes service types based on the service rules defined in the definition name. Grouping service rules together under a definition name provides flexibility when you are determining calculation rules for different types of service accrual processing.

Service types belong to a calculation group. The calculation group can be associated with one or more service types. The calculation group enables you to group employees who have the same calculation rules applied to their service accrual process.

To set up service accrual control tables, you must:

1. Establish service calendars.
2. Define HR actions and categories.
3. Associate a calendar, proration, and date method with a service definition name.
4. Define the HR service categories.
5. Define time adjustments.
6. Define HR status history adjustments.
7. Set up final adjustments to the service amount.
8. Define adjustments that limit the number of hours or service units that can be accrued.
9. Define service calculation groups.

Calendar Page

Use the Calendar page (EG_FLXSVC_CALNDR) to establish service calendars for accruing service years.

Navigation

- Set Up HCM, Product Related, Workforce Development, Faculty Events, Calendar, Calendar
- Workforce Development, Faculty Events, Define Faculty Events Data, Calendar, Calendar

Image: Calendar page

This example illustrates the fields and controls on the Calendar page.

*Year	Prd	*Begin Date	*End Date	*Period Name	*Abbrev	Prds Count		
1998	2	01/01/1999	05/31/1999	Semester 2	S2	0.50	+	-
1999	1	08/01/1999	12/31/1999	Semester 1	S1	0.50	+	-
1999	2	01/01/2000	05/31/2000	Semester 2	S2	0.50	+	-

Set the number of months and periods in a service year, as well as the start and end dates for each period in the year.

The period start and end dates are crucial to the service accrual process. These are the dates against which service is accrued for your employees. For example, an organization might have the following definitions:

- An academic year of 10 months (August 1 to May 31).
The year has 2 periods; each period spans 5 months. Service is accrued based on each 5-month period.
- A fiscal year of 12 months (July 1 to June 30).
The year has 1 period spanning the full 12 months. A fiscal year calendar might be used to accrue service credits for seniority.

When you create a new calendar, enter information into all of the fields in the calendar grid and add a row for each period in each year against which you want the calendar to enable service to accrue.

The background processes that track flexible service and tenure service don't accrue service credits for dates that are not represented on the calendar. Therefore, you must ensure that the calendar being used by a particular service type spans the date range for the accrual process.

Computational Period

Year, Semester, Term, Quarter, or Month Select a time frame to accrue flexible service or tenure.

Year Type	<p>Select a year type on which to base calculations. Then specify the number of months and periods in a year for this year type, for example, an academic year of <i>10</i> months divided into <i>4</i> periods (quarters).</p> <p>Your system is delivered with year types <i>Acad-10</i> and <i>Fiscal-12</i>. You can make additional entries on the translate table.</p>
Months in a Year	Enter the number of months in the calendar year that you are defining.
Periods in a Year	Enter the number of periods in the calendar year.
Year	<p>Enter the calendar year that is covered by the defined calendar. For example, if the academic year 2006 comprises two semesters, one starting in September 2005 and the other in January 2006, enter 2006 in this column for both semester rows.</p>
Prd. (period)	Enter the period for the defined calendar year. Enter the calendar period numbers in sequence; for example, <i>1</i> through <i>4</i> , if you selected <i>Acad-10</i> divided into <i>4</i> periods.
Begin Date and End Date	Enter the period's start and end dates.
Period Name	Enter the period name.
Abbrev (abbreviation)	Enter an abbreviated name for the period.
Prds Count (periods count)	Using a decimal value of up to two decimal places, enter how much the period counts toward the entire year (for example, for four periods, each period can count as 0.25 of the total year). Use this value to calculate how much credit an employee receives for working the period.

Important! When you enter start and end dates on the employee's Service History page and on the Tenure Calculation or Flexible Service Calculation run control pages, make sure that the dates on the pages match the dates in the Begin Date and End Date fields; otherwise the process won't run. You might have to define calendars solely for the purpose of accommodating employees whose start dates don't correspond to an existing calendar period begin date and end date.

HR Action/Category Page

Use the HR Action/Category page (EG_HR_CATEGORY) to group similar actions and reasons that count toward service and tenure accrual.

Navigation

- Set Up HCM, Product Related, Workforce Development, Faculty Events, HR Action/Category, HR Action/Category
- Workforce Development, Faculty Events, Define Faculty Events Data, HR Action/Category, HR Action/Category

Image: HR Action/Category page

This example illustrates the fields and controls on the HR Action/Category page.

The job action and reason codes that are identified in the HR categories are processed against the employee's job records during the accrual process.

Defining HR actions and categories on this page doesn't, by itself, identify which HR job actions and reasons to count towards tenure. This step is completed on the Service Include Category page. By grouping the categories on this page, you eliminate the need to identify them individually on the Service Include Category page.

See [Service Include Category Page](#).

The HR action and category processing rules may differ amongst faculty or employee groups, requiring you to set up multiple HR categories. For example, one HR category might include the job actions *Hire*, *Termination*, or *Leave of Absence*, as well as six or seven reasons that make each action eligible to count for service credits. Another HR category might include the job actions *Hire*, *Termination*, or *Leave of Absence*, with only one or two reasons that make the action eligible to accrue service credits. While these HR categories are similar, they have different processing rules.

You can reference job action and reason codes only through HR categories. Even if a category consists of a single action or an action and reason combination, you must include the job action and reason in a HR category to reference that code in the flexible service rules.

Category Name

Displays the service category name that you entered on the page. If you are adding a new category, enter a new category name that describes the type of job actions and reasons to which the category applies on the HR Action/Category page. Examples of category names are CAT_LOA (category leave of absence) and CAT_HIRE (category hire).

Action

Select the job action that should accrue toward service in this HR category. To include more than one action for this category, select the Insert Row button to add rows.

Reason

Select a reason to include reason codes for a job action and make it eligible to accrue service credits.

You can specify more than one reason for an action by adding a row and selecting the same action and a different reason.

All Reasons

Select to specify that all reason codes for a job action are eligible to accrue service credits. You don't need to add a row for each reason.

Related Links

[Service Definition Page](#)

Service Definition Page

Use the Service Definition page (EG_SVC_DEFINITION) to associate a calendar, a proration method, and a date method (for rounding) with the service definition name.

Navigation

- Set Up HCM, Product Related, Workforce Development, Faculty Events, Service Rules, Service Definition
- Workforce Administration, Flexible Service EG, Define Service Rules, Service Definition
- Workforce Development, Faculty Events, Define Faculty Events Data, Service Rules, Service Definition

Image: Service Definition page

This example illustrates the fields and controls on the Service Definition page.

Service Definition		Service Include Category		Service Add Periods Rules		Service Adj Future		Service Final Handling	
Definition Name:	FACULTY			Description:	Faculty Tenure				
Service Calculation									
Service Type:	E Elps Time								
Tenure Clock/Service Calendar									
*Calendar ID:	1	Academic 10			Computational Period:	S			
Months in a Year:	10			Periods in a Year:	2				
Prorate Method									
Prorate By:	FTE			Pro-rate if below:	0.80				
Elapsed Time Method									
Duration Option:	ACAD10			Academic 10-month Calendar Opt					
Date Method									
Date Round Option:	TOPRVMTH			Round to current if < 15 days					
Date Conversion Option:									

Service rules become part of the definition name that you assign to a service type. The system processes service types based on the service rules that are defined in the definition name. Grouping service rules under a definition name provides flexibility when you are determining calculation rules for different types of service accrual processing.

Definition Name

Displays the name that you selected. Enter a new definition name for this set of service rules in the Add-Service Rules search page.

Service Calculation

Service Type

Displays the method used to calculate accrued service. By default, the system uses *Elps Time* (elapsed time). This method measures the time duration between two dates, taking into account the HR action and category event changes on the employee's job history.

See [Service Include Category Page](#).

Tenure Clock/Service Calendar

Calendar ID

Enter the calendar ID to use for this definition name. Calendars are maintained on the Calendar page. For example, you might link the definition name, FACULTY, to a service calendar that is based on the academic year using the computational period of a semester (10 months in a year and 2 periods in a year).

See [Calendar Page](#).

Months in a Year

Displays the number of months per year for the selected calendar, as defined on the Calendar page and based on the Calendar ID field.

See [Calendar Page](#).

Computational Period

Displays the period of time during which the service calculation is based. This is based on the Calendar ID field, for example, S (semester). This field is populated by the selected calendar, which is maintained on the Calendar page.

See [Calendar Page](#).

Periods in a Year

Displays the number of periods per year for the selected calendar and is based on the Calendar ID field.

Prorate Method

Prorate By

Select a prorate method of *None* or *FTE* (full-time equivalency), depending on the type of service being tracked.

Pro-rate if below

Enter the percentage of FTE (for example, 80) below which you want the system to prorate accrued service. The system calculates any FTE value that is equal to or greater than this value as 1.0, for the purpose of proration. This field isn't visible if you selected *None* in the Prorate By field. The system calculates all FTE values as 1.0.

Elapsed Time Method

Duration Option

Enter a duration from the list of options. You can set up different ways to calculate elapsed time using the Duration Option pages.

See [Setting Up Service Parameters](#).

Date Method

Date Round Option

Enter a date rounding method to be used in calculating service dates. You set date rounding options on the Date Round Option page.

See [Date Round Option Page](#).

Date Conversion Option

Enter a date conversion method, such as *ACAD*, from the list of options. Date conversion methods are established and maintained on the Date Conversion Option page. This field applies only to the flexible service tracking. It doesn't apply to tenure tracking.

See [Date Round Option Page](#).

Related Links

[Date Conversion Option Page](#)

Service Include Category Page

Use the Service Include Category page (EG_SVC_STATUS) to define the HR service categories in the service accrual process in the selected definition name. Use this page to specify the date-rounding options for each HR category that is included on this page.

Navigation

- Set Up HCM, Product Related, Workforce Development, Faculty Events, Service Rules, Service Include Category
- Workforce Administration, Flexible Service EG, Define Service Rules, Service Definition, Service Include Category
- Workforce Development, Faculty Events, Define Faculty Events Data, Service Rules, Service Include Category

Image: Service Include Category page

This example illustrates the fields and controls on the Service Include Category page.

Service Include Category				
Definition Name: FACULTY		Description: Faculty Tenure		
HR Status Adjustment Order				
Future Status:	3	Date Round:	1	Add Time to Date: 2
Tenure/Service Categories				
Include/Add	*Category Type	*Category Name	Date Round Option	
<input checked="" type="checkbox"/>	Hire Category	CAT_HIRE	TOPRVMTH	<input type="button" value="+"/> <input type="button" value="-"/>
		Hire Categories	Round to current if < 15 days	
<input type="checkbox"/>	Other	CAT_LOA	TONXTMTH	<input type="button" value="+"/> <input type="button" value="-"/>
		Leave of Absence	Round to 1st of Following Mont	
<input checked="" type="checkbox"/>	Other	CAT_PLA	TONXTMTH	<input type="button" value="+"/> <input type="button" value="-"/>
		Paid Leave of Absence	Round to 1st of Following Mont	
<input type="checkbox"/>	Termination Category	CAT_TERM	TONXTMTH	<input type="button" value="+"/> <input type="button" value="-"/>
		Termination	Round to 1st of Following Mont	

Employees accrue service credits based on the action and reason codes in their job history. The HR' actions and categories are defined on the HR Action/Category page and comprise one or more job action and reason codes. The action and reason codes defined in the HR category determine whether an employee accrues credits for each job action and reason.

See [HR Action/Category Page](#).

HR Status Adjustment Order (human resources status adjustment order)

You can make multiple adjustments to status, and each change has the same date. Therefore, you must tell the background calculation process in what sequence to apply these adjustments. Using this group box, indicate the order (from 1 to 3) in which the adjustments are to be made.

Future Status Refers to the status entered on the Service Adj Future page.

See [Service Adj Future Page](#).

Date Round Refers to the date round options set on this page.

Add Time to Date Refers to the adjustment entered on the Service Add Periods Rules page.

See [Service Add Periods Rules Page](#).

Tenure/Service Categories

Include/Add Select to have the service category in the Category Name field count toward service accrual. For example, select this check box if you want a leave of absence to count toward service accrual.

Category Type Select a category type such as *Hire Category*, *Other*, or *Termination Category*.

Category Name Enter a HR category name, such as *CAT_LOA* (category leave of absence). An HR category comprises one or more job action and reason codes. You establish HR categories and their component HR' action and category groups on the HR Action/Category page.

See [HR Action/Category Page](#).

For example, if you select the category *CAT_HIRE* (category hire), which you set up to include the action codes *HIRE* (hire) and *REH* (rehire), select the Include/Add check box to make both of these job action codes eligible for accrual within the definition name.

Date Round Option Enter the option that is to be used for each HR category. For example, you might round all hire and rehire dates to the first of the month. Thus, credit is accrued based on the first of the month, regardless of the date in the month that the employee was hired. These options are maintained on the Date Round Option page.

See [Date Round Option Page](#).

Service Add Periods Rules Page

Use the Service Add Periods Rules page (EG_SVC_ADD_PERIODS) to define the adjustments where the effective date of a status change moves forward. Use this page to select the employee records that are affected by the parameters that you set throughout the Service Rules component.

Navigation

- Set Up HCM, Product Related, Workforce Development, Faculty Events, Service Rules, Service Add Periods Rules
- Set Up HCM, Product Related, Workforce Development, Faculty Events, Service Rules, Service Add Periods Rules
- Workforce Development, Faculty Events, Define Faculty Events Data, Service Rules, Service Add Periods Rules

Image: Service Add Periods Rules page

This example illustrates the fields and controls on the Service Add Periods Rules page.

Service Definition | Service Include Category | **Service Add Periods Rules** | Service Adj Future | Service Final Handling

Definition Name: FACULTY Description: Faculty Tenure

Category Details Find | View All First 1-2 of 4 Last

Category Name: CAT_HIRE Hire Categories + -

Record Impacted: None

Adjustment Rule

☒ Specify Periods To Add Number: Unit of the Period:

Category Name: CAT_LOA Leave of Absence + -

Record Impacted: None

Adjustment Rule

☒ Specify Periods To Add Number: Unit of the Period:

Sometimes you may want to delay the effective date of an action and reason event. For example, if an employee can continue to accrue service for the first month of a leave, you adjust the effective date of any leave action by adding a month. Do this by adding a time period to the action and reason effective date.

Category Name

The category name refers to the HR service category, such as CAT_HIRE (category hire) that is specified on the Service Include Category page. To set up adjustment rules for more than one category name, add new rows. If you entered more than one category name, select the insert row button to add information for each category.

See [Service Include Category Page](#).

Record Impacted

Select the instances in which a new status should receive an adjustment. When you add time to an action and reason

effective date, you are giving additional service (or breaks) by delaying the impact of the change. For example, you grant a 30-day leave of absence adjustment for only the first leave and do not adjust any subsequent leaves.

Adjustment Rule

In this group box, specify how the system applies the time adjustment that you specify. When you add time to an action and reason effective date, you delay the impact of the change. You may not want to do this for each occurrence of the action. For example, you can grant the 30-day leave of absence adjustment only for the first leave and not adjust any subsequent leaves.

Periods to Add

Select to add time to an effective date.

Note: This option might be unavailable for entry, depending on your selection in the Record Impacted field.

Number

Enter the number of periods to add to the accrued service.

Unit of the Period

Select the unit for the periods that you are adding. For instance, if you select *Days* in this field and enter 2 in the Number field, the system adds two days to the effective date of the selected category.

Service Adj Future Page

Use the Service Adj Future (service adjust future) page (EG_SVC_ADJ) to define human resource status history adjustments that depend on future changes in status.

Navigation

- Set Up HCM, Product Related, Workforce Development, Faculty Events, Service Rules, Service Adj Future
- Workforce Administration, Flexible Service EG, Define Service Rules, Service Adj Future
- Workforce Development, Faculty Events, Define Faculty Events Data, Service Rules, Service Adj Future

Image: Service Adj Future page

This example illustrates the fields and controls on the Service Adj Future page.

The screenshot shows the 'Service Adj Future' page. At the top are tabs: 'Service Definition', 'Service Include Category', 'Service Add Periods Rules', 'Service Adj Future' (active), and 'Service Final Handling'. Below the tabs, the 'Definition Name' is 'FACULTY' and the 'Description' is 'Faculty Tenure'. A 'Category' section shows 'Category Name: CAT_HIRE' and 'Hire Categories'. The 'Service Information' section contains: 'Service Adjustment Type' set to 'Add'; '*Service Adjustment Action Cd' set to 'RFL' with a search icon; 'Adjust. Reason' with a search icon; 'Occurs Within' section with 'Occurs' set to '4', 'Type' set to 'Months', 'Add' set to '1', and 'Type' set to 'Months'. Below the 'Occurs' fields is the text 'To Current Action/Reason'.

How you treat service for a particular HR status might depend on the employee's subsequent status. For example, employees on leave might accrue service only if they return to work later. On this page, you can adjust the current event based on a future event or adjust a future event based on a second future event.

Adding Time to the Effective Date of a Status Change

By adding a time period, you can delay an effective date based on other events that occur later within defined periods of time.

For example, you can adjust the effective date of a leave of absence by one month (that is, to grant one month of extra service) only if the employee returns within four months. To do this, select *Add* in the Service Adjustment Type field and *RFL* (return from leave) in the Service Adjustment Action Cd (service adjustment action code) field. In the Occurs Within fields, enter *4* in the AdjWin Num field and select *Months* in the Type field; enter *1* in the Add field and select *Months* in the Type field.

Ignoring the Current Status Change

By selecting *Ignore Cur* (ignore current action and reason) in the Service Adjustment Type field, you can ignore the original human resource status change based on other events that occur later within defined periods of time.

When you select this adjustment, select the event in the Service Adjustment Action Cd field. In the Occurs Within fields, indicate how far into the future to look for this event.

For example, you can ignore a leave of absence if the employee returns within one month. To do this, select *Ignore Cur* in the Service Adjustment Type field and *RFL* in the Service Adjustment Action Cd field. In the Occurs Within fields, select *1* and *Months*.

This adjustment has the following effect:

Hire	01/01/2006	Hire	01/01/2006
Leave	05/01/2006	None	None
Return	05/15/2006	Return	05/15/2006

Notice that this employee's 15-day leave is ignored. Because it was less than one month, the system doesn't consider it a break in service.

Using the inside scroll bar, you can enter as many service adjustments, as necessary, for each category.

Service Information

Service Adjustment Type

Select from the list of values. Options are:

- *Add*
- *Ignore Cur* (ignore current)
- *Ignore Fut* (ignore future)
- *Insert*

Some of the fields that appear below this field vary, depending on the value that you select here.

Service Adjustment Action Cd (service adjustment action code)

Enter the type of service adjustment action, such as *HIRE* (hire).

Adjust. Reason (adjustment reason)

Enter the reason for the adjustment, such as *LTDP* (long term disability with pay).

Occurs Within

The system displays this when you select *Add*, *Ignore Cur*, or *Ignore Fut* in the Service Adjustment Type field.

Does Not Occur Within

The system displays this when you select *Insert* in the Service Adjustment Type field.

AdjWin Num (adjustment window number)

Enter a number to use in conjunction with the Type field.

Type

Select *Days*, *Months*, *User Code*, *Weeks*, or *Years*.

Add

Enter a time period to add to the service adjustment. This field appears when you select *Add* in the Service Adjustment Type field.

Ignore Future

Select the type of service adjustment action that is to be ignored in the future. This field appears when you select *Ignore Fut* in the Service Adjustment Type field.

Adj Act 2 (adjustment action 2)

Select a service adjustment action that is define in the HR category. This field appears when you select *Insert* or *Ignore Fut* in the Service Adjustment Type field.

Reason

Select the reason code that is defined in the HR category. This field appears when you select *Insert* or *Ignore Fut* in the Service Adjustment Type field.

Insert

Select the type of service adjustment action that is to be inserted. This field appears when you select *Insert* in the Service Adjustment Type field.

Service Final Handling Page

Use the Service Final Handling page (EG_SVC_FINAL_RND) to set up final adjustments to the service amount.

Navigation

- Set Up HCM, Product Related, Workforce Development, Faculty Events, Service Rules, Service Final Handling
- Workforce Administration, Flexible Service EG, Define Service Rules, Service Final Handling
- Workforce Development, Faculty Events, Define Faculty Events Data, Service Rules, Service Final Handling

Image: Service Final Handling page

This example illustrates the fields and controls on the Service Final Handling page.

Service Include Category | Service Add Periods Rules | Service Adj Future | **Service Final Handling**

Definition Name: FACULTY Description: Faculty Tenure

Final Result Conversion

Final Service Result Units:

Final Result Adjustment

Add Service Amount:

Subtract Service Amount:

Final Service Limit

Minimum Service Amount:

Maximum Service Amount:

The adjustment or service limit on this page applies to the total service amount for the employee. For example, the maximum service cap for a service type is eight years. Once you enter 8 in the Maximum

Service Amount field, the calculation process doesn't accrue more than eight years of service for the employee.

Final Result Conversion

Final Service Result Units

Select the calendar unit, such as *Years*, that is to be used in the final conversion. *Y* is the only value that is available for track flexible service and track faculty events.

Final Result Adjustment

Add Service Amount

Enter the amount, in years, that is to be added to the total accrued service.

Subtract Service Amount

Enter the amount, in years, that is to be subtracted from the total accrued service.

Final Service Limit

Minimum Service Amount

Enter the minimum amount of service that is required for credit for the selected category.

Maximum Service Amount

Enter the maximum amount of service that is permitted for the selected category.

Min/Max Service Rules Page

Use the Min/Max Service Rules (minimum and maximum service rules) page (EG_SVC_MIN_MAX_SVC) to define adjustments that limit the number of hours or service units that can be accrued within a specific period of time.

Navigation

- Set Up HCM, Product Related, Workforce Development, Faculty Events, Service Rules, Min/Max Service Rules
- Workforce Administration, Flexible Service EG, Define Service Rules, Min/Max Service Rules
- Workforce Development, Faculty Events, Define Faculty Events Data, Service Rules, Min/Max Service Rules

Image: Min/Max Service Rules page

This example illustrates the fields and controls on the Min/Max Service Rules page.

Service Add Periods Rules Service Adj Future Service Final Handling **Min/Max Service Rules**

Definition Name: FACULTY Description: Faculty Tenure

Min/Max Service Rule Find | View All First 1-4 of 4 Last

Category	Description	Limit	Limit
CAT_HIRE	Hire Categories	<input type="radio"/> Minimum <input type="radio"/> Maximum <input checked="" type="radio"/> None	<input type="text"/>
CAT_LOA	Leave of Absence	<input type="radio"/> Minimum <input type="radio"/> Maximum <input checked="" type="radio"/> None	<input type="text"/>
CAT_PLA	Paid Leave of Absence	<input type="radio"/> Minimum <input type="radio"/> Maximum <input checked="" type="radio"/> None	<input type="text"/>
CAT_TERM	Termination	<input type="radio"/> Minimum <input type="radio"/> Maximum <input checked="" type="radio"/> None	<input type="text"/>

These rules apply to an HR action and category that is based on a calendar period.

If there are additional categories, use the scroll arrow to display more categories and rules. To add a new row, select the Insert Row button on the Service Include Category page.

Category

Displays the service category, such as *CAT_HIRE* (category hire), which is defined on the Service Include Category page.

See [Service Include Category Page](#).

Description

Displays service category descriptions (such as *Hire Categories*), which are maintained on the Service Include Category page.

See [Service Include Category Page](#).

Limit

Select Minimum or Maximum to specify a minimum or maximum service limit for each category that is listed. Select None for no limit.

Service

Enter the minimum or maximum amount of service for the selected category. This field is required if you selected Minimum or Maximum as a limit.

Calculation Group Page

Use the Calculation Group page (EG_CALC_GRP_DFN1) to define service calculation groups to group employees who have the same calculation rules applied to their service accrual process.

Navigation

- Set Up HCM, Product Related, Workforce Development, Faculty Events, Calculation Group
- Workforce Development, Faculty Events, Define Faculty Events Data, Calculation Group

Image: Calculation Group page

This example illustrates the fields and controls on the Calculation Group page.

Calculation Group

Service Calculation Group: FAC *Function Indic: Tenure

Description: Faculty Tenure Calc. Group ☒ Use Start-Up

Short Description: Faculty

Service Details Find | View All First 1 of 1 Last

Service Type: FACTENURE ☒ Service Type Active

Description: Tenure Service

Service Information Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900

Start Date: 01/01/1900 Stop Date:

Or Alias: EVENT_DT

*Definition Name: FACULTY Faculty Tenure

The calculation group provides a way to group employees who have the same calculation rules applied to their service accrual process. You can associate the calculation group with one or more service types.

By indicating that start-up credits apply to the calculation group, you tell the service accrual process to include the start-up credits that you entered on the employee's Service History page.

See "Service History Page (*PeopleSoft HCM 9.2: Human Resources Track Flexible Service*)".

Service credit accrues against each service type. The service types are linked to a definition name that stipulates which service or calculation rules are applied during the service accrual process. Each service type has its own set of service or calculation rules based on how you set them up. The definition name provides a connection between the service rules (calendar, human resource categories, and date rounding options) and the service type.

The calculation group also identifies which employee types are eligible to accrue service credits in each service type. For example, a service type might have eligibility criteria stating that only full-time employees are qualified to accrue service credits. Another service type might include full-time and part-time employees. You define the employee eligibility criteria for each service type in a calculation group.

For an organization with multiple unions and bargaining units, where service calculation rules are governed by different regulations and collective agreements, you might define a calculation group based on union or bargaining units. The employees' flexible service dates would be managed by the union or bargaining unit (by setting up separate calculation groups).

The calculation groups that you define are associated with the employees in your organization who are eligible to accrue flexible service. The calculation group becomes part of the employee's employment record.

Service Calculation Group	Displays the name that you entered for this calculation group in the Add (if you are creating a new calculation group) or search page. A calculation group name can be up to six characters.
Function Indic. (function indicator)	Select the function, or process, for which this calculation group will be used. Values are <i>Flex Srv</i> (flexible service) and <i>Tenure</i> .
Use Start-Up	Select this check box to include start-up credits to the employee's accrued service. Start-up credit is maintained on the Service Detail page for the employee. Leaving the check box deselected will exclude prior service credits in the calculations.
Service Type	Enter the service type to assign to this calculation group. To assign additional service types, press F7 or select the Insert Row button to add rows.
Service Type Active	Select to activate a service type for the current calculation group. If you deselect the check box for a service type, that service type isn't included in the service accrual process.
Start Date	Enter a valid calendar date as the start date for this calculation group. The start date determines when the change is added to the system. Use a valid calendar date, not an alias, as the start date.
Stop Date	Enter a stop date in this field or select an alias in the Alias field. You must do one or the other.
Or Alias	If you did not enter a stop date in the Stop Date field, enter an alias in this field. Or Alias is a critical field. Enter the alias, <i>EVENT_DT</i> (event date), which links to the job history in the calculation process. The <i>EVENT_DT</i> alias is maintained on the Database Alias page. In the case of a service calculation, the through date is used as the event date.

Definition Name

Once you enter a service type for this calculation group, you must indicate the service rules definition name that the service type will use. This is where your calendar links. The definition name (maintained on the Service Rules component) dictates the calendar that is used. The definition name provides the following information to the system:

- Which calendar to use.
- Which date rounding and proration methods to use.
- What service categories (action and category code groupings) are eligible for inclusion in the service calculation process.

Related Links

[Database Alias Page](#)

Setting Up Tenure Tracking

To set up tenure tracking, use the Academic Rank (EG_RANK_TBL) and the Experience/Credit Codes (EG_EXP_DEFINITION) components.

This topic discusses how to:

- Establish academic ranks.
- Set up experience and credit codes.

Pages Used to Set Up Tenure Tracking

Page Name	Definition Name	Navigation	Usage
Academic Rank	EG_RANK_TBL	<ul style="list-style-type: none"> • Set Up HCM, Product Related, Workforce Development, Faculty Events, Academic Rank, Academic Rank • Workforce Development, Faculty Events, Define Faculty Events Data, Academic Rank, Academic Rank 	<p>Establish academic ranks, tenure tracking eligibility for those ranks, and probationary periods.</p> <p>Before using this page, set up the Calculation Group page.</p>

Page Name	Definition Name	Navigation	Usage
Experience/Credit Codes	EG_EXP_DFN	<ul style="list-style-type: none"> Set Up HCM, Product Related, Workforce Development, Faculty Events, Experience/Credit Codes, Experience/Credit Codes Workforce Development, Faculty Events, Define Faculty Events Data, Experience/Credit Codes, Experience/Credit Codes 	<p>Set up the experience and credit codes that employees can earn at other institutions and apply toward tenure at your organization.</p> <p>Set up a credit code for start-up credit to bring forward any accrued service credit in your organization on the initial loading of tenure service data.</p>

Academic Rank Page

Use the Academic Rank page (EG_RANK_TBL) to establish academic ranks, tenure tracking eligibility for those ranks, and probationary periods.

Before using this page, set up the Calculation Group page.

Navigation

- Set Up HCM, Product Related, Workforce Development, Faculty Events, Academic Rank, Academic Rank
- Workforce Development, Faculty Events, Define Faculty Events Data, Academic Rank, Academic Rank

Image: Academic Rank page

This example illustrates the fields and controls on the Academic Rank page.

Academic Rank

Academic Rank: 001

Academic Rank Information Find | View All First 1 of 1 Last

*Effective Date: 01/01/1990 🔍 *Status: Active + -

*Description: Professor Rank-IPEDS: Professor

Short Description: Prof

☒ Eligible for Tenure Tracking

Tenure Tracking Eligibility

Service Calculation Group: FAC 🔍 ☐ Partial Credit Allowed

Probationary Period (# of yrs): 6.0 ☐ Carry Automatic Tenure

Academic Rank Information

Rank-IPEDS (rank Integrated Postsecondary Education Data System-Full Staff Survey)

Select the rank for IPEDS reporting. Values are *Assist Prf*, *Assoc Prf*, *Instructor*, *Lecturer*, *No Rank*, or *Professor*.

Eligible for Tenure Tracking

Select if the academic rank is eligible for tenure tracking. This does not affect the tenure calculation process.

Tenure Tracking Eligibility

Service Calculation Group

Enter the calculation group for this academic rank. For example, enter *FAC* (faculty) to include the associate professor rank in the faculty calculation group.

Partial Credit Allowed

Select if some credit applies toward tenure service. This does not affect the tenure calculation process.

Probationary Period (# of yrs) (probationary period [number of years])

Enter the number of years this rank is in a probationary period. Employees can have multiple concurrent jobs, but they can accumulate probationary time toward tenure in only one academic rank at a time.

Carry Automatic Tenure

Select if tenure automatically applies to this rank. This does not affect the tenure calculation process.

Experience/Credit Codes Page

Use the Experience/Credit Codes page (EG_EXP_DFN) to set up the experience and credit codes that employees can earn at other institutions and apply toward tenure at your organization.

Set up a credit code for start-up credit to bring forward any accrued service credit in your organization on the initial loading of tenure service data.

Navigation

- Set Up HCM, Product Related, Workforce Development, Faculty Events, Experience/Credit Codes, Experience/Credit Codes
- Workforce Development, Faculty Events, Define Faculty Events Data, Experience/Credit Codes, Experience/Credit Codes

Image: Experience/Credit Codes page

This example illustrates the fields and controls on the Experience/Credit Codes page.

The tenure service accrual and calculation process uses the experiences and credits set up on this page to determine an employee's total time toward tenure as of a specified date.

Add to Tenure Services

Select if the experience or credit code counts toward tenure service in your organization.

Assigning an Employee to Tenure

This topic provides an overview of employee tenure and discusses how to:

- Activate tenure accrual.
- Define tenure data.
- Define prior experience and credits.
- View the change history.
- View related jobs.

Pages Used to Assign an Employee to Tenure

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Tenure Data	EG_EMPL_TENURE	Workforce Development, Faculty Events, Calculate Tenure, Create Tenure Data, Tenure Data	Maintain tenure tracking data for employees. Default information is automatically populated from the Job Data component.
Prior Experience/Credits	EG_PRIOR_EXP	Workforce Development, Faculty Events, Calculate Tenure, Create Tenure Data, Prior Experience/Credits	Track an employee's service accrued from other institutions that counts toward your organization's tenure service clock. Maintain experience and credit types on the Experience/Credit Codes page.
Review Rank/Status History	EG_TENURE_CHG	Workforce Development, Faculty Events, Calculate Tenure, Review Rank/Status History, Review Rank/Status History	View changes made to academic rank and tenure status associated with a home department. The system automatically tracks changes. This page is display-only.
Review Related Jobs	EG_JOB_VW	Workforce Development, Faculty Events, Calculate Tenure, Review Related Jobs, Review Related Jobs	Review current jobs that count toward an employee's tenure. This page is display-only.

Understanding Employee Tenure

Different job actions trigger tenure actions. For example, when you hire, promote, or transfer an employee, the change from one job action to a different one might continue to count for service, or it might start a break in the service.

When you assign an employee to tenure, the system adds a new tenure record and prior experience or credit records to the tenure tracking tables to initiate future processing and information lookups.

To calculate tenure service, establish which job histories that you want to process. To determine relevant jobs and what information becomes the default when you set up an employee's tenure data, indicate whether a job accrues tenure and full-time equivalent (FTE) for the tenure service accrual.

Departments Capable of Granting Tenure

On the Comm. Acctg. and EG (commitment accounting and education and government) page, select the Can Grant Tenure check box to indicate that the department can grant or award tenure. The system automatically activates the Grant Tenure field on the Tenure Data page for employees assigned to tenure granting departments.

Activating Tenure Accrual

To activate tenure tracking for an employee:

1. Access the Job Data - Employment Information page.
2. Select the Accrue Tenure Services check box.
3. Enter a value in the FTE for Tenure Accrual field, such as *1.0*.

Note: FTE cannot be greater than 1.0. On multiple jobs, the sum of the FTEs of all the jobs selected to accrue tenure cannot be greater than 1.0.

Important! Do not use the Calc Group (Flex Service) and FTE for Service Accruals fields unless you run flexible service calculations in addition to tenure. If you run only tenure calculations for the employee, leave these fields blank to avoid errors during the tenure calculation process.

Tenure Data Page

Use the Tenure Data page (EG_EMPL_TENURE) to maintain tenure tracking data for employees.

Default information is automatically populated from the Job Data component.

Navigation

Workforce Development, Faculty Events, Calculate Tenure, Create Tenure Data, Tenure Data

Image: Tenure Data page

This example illustrates the fields and controls on the Tenure Data page.

Tenure Data | **Prior Experience/Credits** | **Service History**

Gerard Miller | EmplID: K0G013

*Tenure Status: **Tenure** | Home Rank: **001** | Professor

Track Start Date: **05/22/2009** | Change Date: **05/22/2009** | Change Reason: **Retro Adj**

Original Track Date: **03/07/2006** | *Tenure Home: **13000** | Finance and Administration | Grant Tenure: **N**

Service Calc Group: **FAC** | Mandatory Review Dt: | Granted Date: |

☐ Override Calculation | Committed FTE: | [Notes](#)

Probation (Number of Years)

Total Required:	0.000000	Time Accrued:	0.000000	Current As Of Date:
Extended By:	0.000000	Time To Accrue:	0.000000	<input type="checkbox"/> Terminal Year

Other Tenure Departments List | [Customize](#) | [Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#)

	Department	Description	Grant	Rank	Rank Description	Tenure Status	Effective Date	FTE		
1	10000	Human Resources	N	001	Professor	On Track	08/15/2007			

Tenure Status

Select the employee's current status: *Non Tenure Not On Track*, *Non Tenure On Track*, *Not Applicable*, *Other*, *Tenure*, *Tenure Denied*, or *Tenure by de facto*.

Note: The tenure accrual program processes employees with the *Non Tenure On Track* status only.

Home Rank	This value automatically populates from the Position Data component or the Job Code component. If you did not set up a home rank in these components, select it here (such as <i>001</i> (professor)).
Track Start Date	<p>Displays the date that the employee's tenure accrual begins. The default is the hired date from the employment record. Employees with the <i>Non Tenure On Track</i> tenure status must have a track start date.</p> <p>The track start date must correspond to the begin date of the calendar associated with the calculation group to ensure that the tenure calculation process runs correctly. For example, if an employee's track start date is <i>09/01/2005</i>, then the calendar begin date must be <i>09/01/2005</i>. For this reason, you might define calendars only to accommodate track start dates.</p>
Change Date and Change Reason	Display the date the rank or status change is effective and the reason for the change. The default date is the track start date. If the Change Reason field does not display a default, select one of the options in the Tenure Status field.
Original Track Date	Displays the date tenure tracking begins for the employee. The default is the track start date.
Tenure Home	Displays the department granting the employee's tenure. This value is automatically populated from the employee's current job record.
Grant Tenure	The system automatically activates this display-only field for employees assigned to tenure granting departments shown in the Tenure Home field. The <i>Y</i> (yes) or <i>N</i> (no) data indicates if the home department can grant tenure.
Service Calc. Group (service calculation group)	Select the group used to calculate tenure accrual.
Mandatory Review Dt (mandatory review date)	Enter the employee's mandatory review date.
Granted Date	Enter the date that tenure was granted.
Override Calculation	Select to not include this employee in the tenure calculation process.
Committed FTE (committed full-time equivalent)	Enter the percentage of time the employee is a committed FTE. This enables you to track the tenure FTE committed for budgetary reasons. The FTE for Tenure Accrual field on the Job Data - Employment Information page determines the proration for the accrual process.

Note: The tenure calculation process does not use other tenure departments' information.

Notes Select to enter notes regarding the employee's tenure.

Probation (Number of Years)

Total Required Displays the total number of probationary years required before granting tenured status. The system automatically populates this value from the Academic Rank table.

Time Accrued Displays the number of accrued probationary years. The system populates this value on the Service History page.

Current As Of Date Displays the end date of the last processed computational period.

Extended By Enter the number of years by which the probationary period is extended for this employee, if appropriate.

Time To Accrue Displays the remaining probationary years that the employee must accrue.

Terminal Year Select when the employee is in the last year of probation.

For example, if the total of required probationary years is 8 and the time to accrue is 1, select this check box.

The Time Accrued and Time To Accrue fields display 0 years when you select this check box.

Other Tenure Departments List

Use this group box to maintain tenure-related information for an employee in departments other than the home department. This data does not come from the employee's job record and is not used in the tenure calculation process. It is strictly for informational purposes.

Department Enter other departments in which the employee is accruing tenure. For example, an employee might hold positions in two departments.

Rank Enter the rank that the employee holds in that department. Maintain ranks in the Academic Rank table.

Tenure Status Enter the employee's tenure status for the position.

Effective Date Enter the date the tenure status is effective.

FTE (full-time equivalent) Enter the percentage of time the employee is a committed FTE.

Related Links

"Department Profile Page (*PeopleSoft HCM 9.2: Application Fundamentals*)"

Prior Experience/Credits Page

Use the Prior Experience/Credits page (EG_PRIOR_EXP) to track an employee's service accrued from other institutions that counts toward your organization's tenure service clock.

Maintain experience and credit types on the Experience/Credit Codes page.

Navigation

Workforce Development, Faculty Events, Calculate Tenure, Create Tenure Data, Prior Experience/Credits

Image: Prior Experience/Credits page

This example illustrates the fields and controls on the Prior Experience/Credits page.

The screenshot displays the 'Prior Experience/Credits' page for Gerard Miller (Person ID: K0G013). The page includes tabs for 'Tenure Data', 'Prior Experience/Credits', and 'Service History'. The 'Original Start Date' is 05/01/1998, and the 'Highest Education Level' is A-Not Indicated. The 'Summary Totals' section shows: Total Time Required: 0.000000, Total Time Accrued: 0.000000, Prior: 0.000000, and Time To Accrue: . The main table lists three entries of prior experience/credits:

*Exp / Credit	Description	*From Date	To Date	Credit Granted	Add to Tenure	Rank	Rank Description	Notes		
1 PUNV	Prior University Experience	03/07/2000			<input checked="" type="checkbox"/>			Notes	+	-
2 PRSH	Prior Research Experience	01/08/2000	01/15/2000		<input checked="" type="checkbox"/>			Notes	+	-
3 PRSH	Prior Research Experience	08/07/1999	12/30/2000		<input checked="" type="checkbox"/>			Notes	+	-

Original Start Date

Displays the employee's hire date.

Highest Education Level

Displays the employee's highest level of education.

Summary Totals

Total Time Required

Displays the total number of service years required to receive tenure. This value is automatically populated from the Total Required field on the Tenure Data page.

Total Time Accrued

Displays the total number of service years accrued toward tenure. This value is automatically populated from the Time Accrued field on the Tenure Data page. The number changes if you make an online adjustment to the service history.

Prior

Displays the total number of years from prior employment that count toward tenure service (calculated to two decimal places).

Time To Accrue

Displays the number of years remaining to accrue tenure status. This value is automatically populated from the Time To Accrue field on the Tenure Data page. The number of years

remaining to accrue tenure status changes if you make an online adjustment to the service history.

Prior Experience/Credit

Exp / Credit (experience/credit)	Select the employee's previous experience or credit type, such as <i>PRSH</i> (research).
From Date and To Date	Enter the beginning and ending dates of the experience or credit.
Credit Granted	Enter the amount of credit granted for the prior experience.
Add to Tenure	Select this check box to add these credits to tenure accrual.
Rank	Select the rank at which the credits were granted, such as <i>001</i> (professor).
Notes	Select to enter comments regarding prior experience.

Review Rank/Status History Page

Use the Review Rank/Status History page (EG_TENURE_CHG) to view changes made to academic rank and tenure status associated with a home department.

The system automatically tracks changes. This page is display-only.

Navigation

Workforce Development, Faculty Events, Calculate Tenure, Review Rank/Status History, Review Rank/Status History

Image: Review Rank/Status History page

This example illustrates the fields on the Review Rank/Status History page.

Review Rank/Status History

Employee:	William Niles	PU018
Tenure Home:	90310	Tenure Status: NTK On Track
Track Start Dt:	02/01/1995	Calc Group: FAC
	Override Calc:	Tenure Granted Date:

Home Department Rank/Status Change History				
Find View All First 1 of 1 Last				
Eff Date	Academic Rank	Tenure Status	Action Date	Change Reason
02/01/1995	001 Professor	NTK On Track	05/31/2000	

Employee	Displays the employee's name and ID.
Tenure Home	Displays the code for the department in which the employee received, or will receive, tenure.
Tenure Status	Displays the employee's tenure status.
Calc Group (calculation group)	Displays the calculation group used to calculate this employee's tenure, such as <i>FAC</i> .
Track Start Dt (track start date)	Displays the date tenure tracking began for the employee.
Override Calc (override calculation)	This check box is selected only if the Override Calculation check box is selected on the Tenure Data page.
Tenure Granted Date	Displays the date tenure was granted if the employee received tenure status.

Home Department Rank/Status Change History

Academic Rank	Displays the employee's academic rank at the time of the rank or status change.
Tenure Status	Displays the employee's tenure status at the time of the rank or status change.
Action Date	Displays the date the rank or status change takes place.
Change Reason	Displays the reason for the rank or status change.

Review Related Jobs Page

Use the Review Related Jobs page (EG_JOB_VW) to review current jobs that count toward an employee's tenure.

This page is display-only.

Navigation

Workforce Development, Faculty Events, Calculate Tenure, Review Related Jobs, Review Related Jobs

Image: Review Related Jobs page

This example illustrates the fields on the Review Related Jobs page.

Review Related Jobs

Employee: William Niles PU018
Tenure Home: 90310 Electrical Engineering **Tenure Status:** NTK On Track
Track Start Dt: 02/01/1995 **Calc Group:** FAC **Override Calc:** **Tenure Granted Dt:**

Jobs Counted for Tenure Accrual				
Empl Record	FTE For Accrual	Current Department	Job Code	Position
0	0.50	90310 Electrical Engineering	720000 Professor	PUU6027

Employee	Displays the employee's name and ID.
Tenure Home	Displays the code for the department in which the employee received, or will receive, tenure.
Tenure Status	Displays the employee's tenure status.
Track Start Dt (track start date)	Displays the date tenure tracking began for the employee.
Calc Group (calculation group)	Displays the calculation group used to calculate this employee's tenure, such as <i>FAC</i> .
Override Calc (override calculation)	Displays a <i>Y</i> for yes only if the Override Calculation check box is selected on the Tenure Data page.
Tenure Granted Dt (tenure granted date)	Displays the date the employee received tenure status.

Jobs Counted for Tenure Accrual

Empl Rcd# (employee record number)	Maintain this number in the Job Data component.
---	---

FTE For Accrual

Displays the employee's FTE value, such as .80 for an employee working 80 percent of a normal full-time schedule. Maintain the FTE for accrual on the Job Data - Job Information page.

Job Code

Maintain job code IDs on the Job Code component.

Position

Displays the employee's position number and a description of the position.

Running the Tenure Calculation Process

This topic provides an overview of the tenure calculation process and discusses how to:

- Calculate tenure.
- View the message log.
- View the periodic process results.
- View the tenure calculation summary.
- View the service history.

Pages Used to Run the Tenure Calculation Process

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Perform Tenure Calculations	RUNCTL_EGPP01	Workforce Development, Faculty Events, Calculate Tenure, Perform Tenure Calculations, Perform Tenure Calculations	Calculate tenure. Run tenure calculation processes and update tenure service history. Before using this page, set up the Calculation Group page.
Message Log Review Processing Messages	EG_MESSAGE_LOG	<ul style="list-style-type: none"> • Workforce Administration, Flexible Service EG, Message Log, Message Log • Workforce Development, Faculty Events, Calculate Tenure, Review Processing Messages, Review Processing Messages 	View dated and timed information about calculation processes. Track errors in processes and searches for error messages associated with a particular run.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
View Periodic Results Review Tenure Run Results	EG_PRDIC_RSLTS	<ul style="list-style-type: none"> Workforce Administration, Flexible Service EG, View Periodic Results, View Periodic Results Workforce Development, Faculty Events, Calculate Tenure, Review Tenure Run Results, Review Tenure Run Results 	<p>View the results of the tenure calculation process, such as the employee's tenure status, what was processed, and whether the run was successful or not.</p> <p>This information is temporary and changes when you run the calculation process in Update to History mode.</p>
Review Tenure Calc Summary (review tenure calculation summary)	EG_CLC_SVC_SUM	Workforce Development, Faculty Events, Calculate Tenure, Review Tenure Calc Summary, Review Tenure Calc Summary	<p>View the tenure calculation summary for the calculation process run in Normal Run or Delete_Rebuild History mode. When you run the calculation process in Update to History mode, you can no longer view this page.</p>
Service History	EG_SVC_HIST	Workforce Development, Faculty Events, Calculate Tenure, Create Tenure Data, Service History	<p>View the service history for employees and enter service adjustments and codes. Maintain adjustment action and reason codes on the HR Action/Category page.</p>

Understanding the Tenure Calculation Process

Tenure calculation is a two-step process:

1. Calculate tenure service in Normal Run mode for a specific time period, such as a semester or quarter.

Calculate tenure service for a calculation group or an individual employee. View the results on the View Periodic Results page; these results are temporary until you run the calculation process in Update to History mode.

Also view messages about the processing on the Message Log page. This enables you to ensure that tenure calculation processes are running correctly before you commit them to history by using Update to History mode.

2. Use Update to History mode to make the results of the Normal Run mode permanent.

Running the calculation process in Update to History mode updates the tenure service totals on the employee tenure data record and adds new service details to the employee service history. View the results on the Tenure Data - Service History page.

Note: If you calculate tenure for an individual employee, run the calculation process in Normal Run mode for that employee only; then, use Update to History mode for all the employees within a tenure calculation group at the same time.

Run the tenure calculation process periodically (for example, at the end of the academic year to calculate accrued tenure for employees). You can run this process as often as necessary.

How the System Calculates Tenure Service

To calculate tenure service, the system:

- Determines an employee's eligibility by checking the tenure status on the tenure data record.

The calculation process processes employees with the Non Tenure On Track status only.

- Calculates service based on the from date and to date, which constitute the computational period specified on the Perform Tenure Calculations page.

Note: The only time the system does not calculate service based on the from date and to date is the first time the employee goes through the calculation process. Because the employee has no service history, the system uses the employee track start date as the from date.

- Checks the employee's job history for the computational period to determine the service amount.

The process uses the elapsed time method to calculate service by measuring the time between two dates. In the case of job history, it measures the time between the effective dates of two job records and then applies the applicable service rules to the employee's tenure calculation group. View the calculation group in the employee's tenure data record. The process also uses the set up tables as shown in Setting Up Service Accrual Control Tables.

See [Setting Up Service Accrual Control Tables](#).

- Performs any prorating by FTE on the calculated service before writing the service details to a temporary service history file.

This occurs only if it is specified on the Service Rules page. Service details are written by the computational period set up on the Calendar page.

- Reviews the action and category codes of employees in the calculation group to determine whether they were in an eligible status during a specific time period as defined on the Calendar page.

If the employee is eligible for the whole period, the system grants the employee the amount of credit indicated on the Calendar page.

- Grants partial or prorated credit if the employee is in an eligible status for all (or part) of the period.

How the System Updates Tenure and Service History

To update tenure service and service history, the system:

- Processes employees by selecting their service details from the temporary service history file.
- Updates employee tenure data records:
 - Adds the total calculated tenure amount to the Time Accrued field.
 - Subtracts the amount from the Time to Accrue field to show the remaining time the employee needs to accrue to reach the amount in the Total Required field.

- Updates the Current As Of field to show the to date of the calculation period.
- Updates the employee service history with the new tenure accrual details from the temporary file.
- Purges the tenure accrual details from the temporary service history file.

Related Links

[Setting Up Service Parameters](#)

[Setting Up Service Accrual Control Tables](#)

Perform Tenure Calculations Page

Use the Perform Tenure Calculations page (RUNCTL_EGPP01) to calculate tenure.

Run tenure calculation processes and update tenure service history. Before using this page, set up the Calculation Group page.

Navigation

Workforce Development, Faculty Events, Calculate Tenure, Perform Tenure Calculations, Perform Tenure Calculations

Image: Perform Tenure Calculations page

This example illustrates the fields and controls on the Perform Tenure Calculations page.

From Date and To Date

Enter the time period for the calculation process in these fields. These dates must exactly match a computational period of the calendar used by the calculation group that you are processing. The from date must match a period begin date in the calendar, and the to date must match a period end date.

For example, you might want to calculate tenure for an academic year that consists of two computational periods:

01/01/05 to 06/31/05, and 07/01/05 to 12/31/05. Therefore, enter *01/01/05* as the from date and *12/31/05* as the to date. The process creates a service history for each computational period.

Calc Group (calculation group)

Select the calculation group, such as *FAC* (faculty) for which you want to run tenure service totals. The calculation group processes all employees within that group for the specified dates unless you specify an individual employee ID.

When you process an individual, you must select a calculation group.

EmplID (employee ID)

Select the employee ID only to process tenure for an individual employee; otherwise, leave this field blank.

Periodic Processing Mode - EG

Select from the available options in which you want to run the tenure calculation process. The system automatically selects one of the related check boxes to reflect your selection. Values include:

Delete & Rebuild History: Select to regenerate tenure service for an individual employee (or all employees) within a tenure calculation group. None of the adjustments that you entered on the Tenure Data - Service History page re-accrue. You must re-enter the adjustments. All start-up credits are recalculated.

When you select this option, the system selects the Delete & Reload History check box.

Warning! Running the calculation in this mode removes all service history for the tenure calculation group or employee.

Normal Run: Select to calculate tenure and create temporary tenure accrual records, which you view on the Review Tenure Calc Summary page. The system purges the calculation when you run the process in *Update to History*.

When you select this option, the system selects the Delete old Calc Results (delete old calculation results) check box.

Update to History: Select to update the Tenure Data - Service History page. The results from using normal run become the input data for this value. When you select this value, the system selects the Commit to History check box.

You must use the same run control ID that you used in normal run, and the run control ID must be the same as the computational period. If you have a temporary file (from using normal run) for an employee, and use the same run control ID but change the end date, the system updates the contents of the temporary file.

Message Log Page

Use the Message Log page (EG_MESSAGE_LOG) to view dated and timed information about calculation processes.

Track errors in processes and searches for error messages associated with a particular run.

Navigation

- Workforce Administration, Flexible Service EG, Message Log, Message Log
- Workforce Development, Faculty Events, Calculate Tenure, Review Processing Messages, Review Processing Messages

Image: Message Log page

This example illustrates the fields and controls on the Message Log page.

The screenshot shows the 'Message Log' page with a search section and a table of messages.

Search Section:

- View Messages** (Section Header)
- *Search Criteria:** A dropdown menu currently set to 'Instance'.
- Instance:** A text input field containing the value '1'.
- To Instance:** A text input field containing the value '1'.
- Job ID:** An empty text input field.
- Search:** A button to execute the search.
- ☐ **Show Program Names** (Checkbox)

Data Table:

Instance	Job ID	DateTime	Program	Message	
1	APP ENGINE	05/20/2009 12:13:38PM	Updating VERSION of PS_ARCH_PROJ (0,0)		
1	APP ENGINE	05/20/2009 12:13:38PM	Updating VERSION of PS_PRCSDDEFN (0,0)		
1	APP ENGINE	05/20/2009 12:13:38PM	Updating VERSION of PS_PRCJOBDEFN (0,0)		
1	APP ENGINE	05/20/2009 12:13:38PM	Updating VERSION of PS_PRCRECUR (0,0)		
1	APP ENGINE	05/20/2009 12:13:38PM	Deleting PSRECURDEL (0,0)		

Table controls: Find | View 100 | First | 1-5 of 177 | Last

Search Criteria

Select *All*, *Instance*, *Job ID*, or *Both* as the focus of the inquiry. The related fields become available based on the option that you select.

Process Instance and To Instance

If you select *Instance* or *Both* as the search criteria, enter the process instance number. The To Instance field automatically displays the same number. To include more than one calculation process instance, enter the number of the last instance or process for which you want information in the To Instance field.

Job ID

If you select *Job ID* as the search criteria, this field becomes available. Enter the background process name.

Show Program Names

Select to display names of the specific programs that generate the error messages.

Search

Select to display the error messages.

Date Time

Displays the date and time the program ran.

Program

Displays the program message in the text box if you selected the Show Program Names check box.



Select the More button to display detailed information about an error message.

View Periodic Results Page

Use the View Periodic Results page (EG_PRDIC_RSLTS) to view the results of the tenure calculation process, such as the employee's tenure status, what was processed, and whether the run was successful or not.

This information is temporary and changes when you run the calculation process in Update to History mode.

Navigation

- Workforce Administration, Flexible Service EG, View Periodic Results, View Periodic Results
- Workforce Development, Faculty Events, Calculate Tenure, Review Tenure Run Results, Review Tenure Run Results

Image: View Periodic Results page

This example illustrates the fields on the View Periodic Results page.

View Periodic Results			
Run Control ID:	Faculty	Run Date:	06/05/2000
Process Instance:	541	Run Status:	Complete with no Errors
To Date:	12/31/1998	Periodic Cycle:	Process Mode: Normal Run
Service Calculation Group:	FAC	Name:	
Calculate All Groups:	N		
Delete & Reload History:	N	Delete old Calc Results:	Y
		Commit to History:	N
<div> Data Find View All First 1 of 1 Last </div>			
Calc Group:	FAC	Employees Processed:	7
Service Type:	FACTENURE	Employees with Errors:	7
<div> Employees with Errors Find View All First 1-3 of 7 Last </div>			
PJ015	Wysocki,Wendy		
PJ016	Honda,Dennise		
PJ018	Niko,Noreen		

Run Date

Displays the date that the calculation process ran.

Process Instance

Displays the calculation process instance number.

Run Status	Displays basic information about the calculation process, including whether the system encountered problems.
To Date	Displays the end date of the period covered in this calculation process.
Periodic Cycle	Displays the periodic cycle for this run control ID.
Process Mode	Displays the period processing mode from the Perform Tenure Calculations page (for track faculty events) or the Service Calc page (for track flexible service).
Service Calculation Group	Displays the calculation group included in this calculation process run.
Name	Displays the employee's ID number if you are running the calculation process for an individual employee.
Calculate All Groups	Displays <i>N</i> (no).
Delete & Reload History, Delete old Calc Results, and Commit to History	Displays <i>Y</i> (yes) or <i>N</i> (no), depending on the period processing mode that you selected.
Service Type	Displays the service type included in the calculation process.
Employees Processed	Displays the number of employees processed during this calculation.
Employees with Errors	Displays the number of employee records the system designated as erroneous during the calculation process.

Review Tenure Calc Summary Page

Use the Review Tenure Calc Summary page (EG_CLC_SVC_SUM) to view the tenure calculation summary for the calculation process run in Normal Run or Delete_Rebuild History mode.

When you run the calculation process in Update to History mode, you can no longer view this page.

Navigation

Workforce Development, Faculty Events, Calculate Tenure, Review Tenure Calc Summary, Review Tenure Calc Summary

From Date and To Date	Displays the dates between which the tenure calculation process ran.
Begin/End Date	Displays the beginning and ending dates for this calculation process.
Service Amt without Breaks (service amount without breaks)	Displays the amount of service without breaks that counts toward tenure.
Service Amt with Breaks (service amount with breaks)	Displays the amount of service with breaks that counts toward tenure.

Accrued Service	Displays the total amount of accrued service time.
Accum Breaks (accumulated breaks)	Displays the total amount of accumulated breaks in service.
<hr/> <p>Note: If the employee has existing service history, the total service amount comes forward in an entry with an action of <i>BFW</i>. Begin and end dates for the entry show the date prior to the from date of the period specified on the Perform Tenure Calculations page.</p> <hr/>	
Action	Displays the job action code that contributed to the service accrual for the calendar period.
Breaks	Displays the amount of breaks in service.
EmplID	Displays the ID of the employee whose service information was processed.

Service History Page

Use the Service History page (EG_SVC_HIST) to view the service history for employees and enter service adjustments and codes.

Maintain adjustment action and reason codes on the HR Action/Category page.

Navigation

Workforce Development, Faculty Events, Calculate Tenure, Create Tenure Data, Service History

Image: Service History page

This example illustrates the fields and controls on the Service History page.

The screenshot shows the 'Service History' tab for user William Niles (EmplID: PU018). It displays summary statistics and a table of service history entries.

Summary Statistics:

- Total Time Required: 6.000000
- Total Time Accrued: 0.450000
- Prior: 0.000000
- Time To Accrue: 5.550000

Detail Information Table:

Begin Date	End Date	Service w/o Breaks	Total Service Accrued	Accum Breaks	Rank	Calc Group	Gen /Adj
08/01/1995	12/31/1995	0.250000	0.450000	0.000000	001	FAC	G
Action: HIR Reason Code:		Adjustment Reason:			Notes		
01/01/1995	05/31/1995	0.200000	0.200000	0.000000	001	FAC	G
Action: HIR Reason Code:		Adjustment Reason:			Notes		

Total Time Required

Displays the total number of service years required from the Tenure Data page.

Total Time Accrued

Displays the number of years accrued toward tenure.

Prior

Displays tenure credits for prior experience from the Prior Experience/Credits page.

Time to Accrue

Displays the remaining number of years before tenure is granted.

Begin Date and End Date

Displays the beginning and ending dates of the tenure in this calculation process. You cannot change these dates if the service history for the period already exists.

Service w/o Breaks (service without breaks)

Displays the percent of FTE accrued without service breaks.

Total Service Accrued

Displays the total percentage of services accrued. This field increases incrementally when you run the calculation process.

Accum Breaks (accumulated breaks)

Displays the accumulated service breaks.

Rank

Displays the rank for the calculation group.

Calc Group (calculation group)	Displays the calculation group, such as <i>FAC</i> .
Gen/Adj (generated or adjustment)	If the calculation process creates the line, this field displays <i>G</i> (generated). If it is entered online, it displays <i>A</i> (adjustment).
Action	Displays the job action, such as <i>LOA</i> (leave of absence), occurring within the requested period.
Reason Code	Displays the reason code associated with the action that makes it count toward accrued tenure.
Adjustment Reason	Select the reason tenure is added to the total tenure accrued. Use this field to adjust tenure accrual history records. You can add a new row or adjust an existing row. You can also modify a record generated by the system. However, running a calculation process in Delete_Rebuild History mode purges the record.
Notes	Select this button to display notes regarding the employee's tenure history.

Chapter 4

Tracking Events

Tracking Faculty Events

This topic lists common elements and discusses how to:

- Track an employee's activities.
- Set up administrative posts.
- Track administrative posts, title, and appointments.
- Track presentations.
- Track publications.
- Track student advisees.
- Track a faculty member's teaching responsibilities.

Pages Used to Track Faculty Events

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Activities	EG_ACTIVITIES	Workforce Development, Faculty Events, Track Events, Activities, Activities	Track employees' research activities by type of academic activity, date, sponsor, and organization.
Faculty Events - Administrative Posts	EG_ADMIN_POST_TBL	Set Up HCM, Product Related, Workforce Development, Faculty Events, Administrative Posts, Administrative Posts	Set up administrative posts.
Track Events -Administrative Posts	EG_ADMIN_POSTS	Workforce Development, Faculty Events, Track Events, Administrative Posts, Administrative Posts	Track administrative posts and appointments and titles that you do not want to track in the Job Data component. Before using this page, set up the Faculty Events - Administrative Posts page (EG_ADMIN_POST_TBL).
Presentations	EG_PRESENTATIONS	Workforce Development, Faculty Events, Track Events, Presentations, Presentations	Track information about presentations given by employees.

Page Name	Definition Name	Navigation	Usage
Publications	EG_PUBLICATIONS	Workforce Development, Faculty Events, Track Events, Publications, Publications	Track information about the employees' published works.
Student Advisement	EG_ADVISEMENT	Workforce Development, Faculty Events, Track Events, Student Advisement, Student Advisement	Track information about any advisement activities.
Teaching Responsibilities	EG_TEACHING_RESP	Workforce Development, Faculty Events, Track Events, Teaching Responsibilities, Teaching Responsibilities	Track faculty teaching responsibilities.

Common Elements Used to Track Faculty Events

Average Grade

Enter an average grade, using letters or numbers. For example, 3.8.

School Code

Select a school code. When you press the tab key, the system automatically displays the school name, state, and country. If no code exists, enter the school name in the related field.

Maintain school codes in the School Table.

Country and State

Enter the school country and state if the system does not automatically display them.

If you select a different country code after you have already selected a state code, the system clears the value in the State field.

Activities Page

Use the Activities page (EG_ACTIVITIES) to track employees' research activities by type of academic activity, date, sponsor, and organization.

Navigation

Workforce Development, Faculty Events, Track Events, Activities, Activities

Image: Activities page

This example illustrates the fields and controls on the Activities page.

Activities

William Niles EmplID: PU018

Tenure/Home Dept: 90310

Academic Rank: Professor Tenure Status: On Track

Activities Find | View All First 1 of 1 Last

Activity Type: Scholarly Research

Activity: Research

Sponsor: Department Internal/External: Internal

From Date: 03/01/1999 Thru Date: 11/13/2000 *Compensated: No Comp

Organization:

Comments:

Compensated

Select *Comp* if the employee was compensated for the activity, or *No Comp* if the employee was not compensated.

Organization

Enter the name of the department or external organization where the activity took place.

Faculty Events -Administrative Posts Page


Use the Faculty Events - Administrative Posts page (EG_ADMIN_POST_TBL) to set up administrative posts.

Navigation

Set Up HCM, Product Related, Workforce Development, Faculty Events, Administrative Posts, Administrative Posts

Image: Faculty Events - Administrative Posts page

This example illustrates the fields and controls on the Faculty Events - Administrative Posts page..



Administrative Post

Enter the name of the administrative post, appointment, or title, such as *Chair*.

Stats Can Responsibility (Statistics Canada Responsibility)

This data only appears in the Statistics Canada Academic Teaching Survey reports. Select a responsibility code. This field is for Canadian higher education degree-granting institutions only.

Track Events - Administrative Posts Page

Use the Track Events - Administrative Posts page (EG_ADMIN_POSTS) to track administrative posts and appointments and titles that you do not want to track in the Job Data component.

Before using this page, set up the Faculty Events - Administrative Posts page (EG_ADMIN_POST_TBL).

Navigation

Workforce Development, Faculty Events, Track Events, Administrative Posts, Administrative Posts

Image: Track Events - Administrative Posts page

This example illustrates the fields and controls on the Track Events - Administrative Posts page.

Administrative Posts

[William Niles](#) EmplID: PU018

Tenure/Home Dept: 90310

Academic Rank: Professor Tenure Status: On Track

Administrative Posts Find | View All First 1 of 1 Last

*Administrative Post:	Chair	Chair
Post Type:	Academic Responsibility	
*Appointment Type:	Initial Appointment	
Description:	Chair of Admissions Board	
*From Date:	09/01/1999	End Date:
Revision Date:		Reason:
Set ID:	PSUSI	Department:
Organization:	State University	
Comments:		

Administrative Post	Select an administrative post.
Appointment Type	Select the type of appointment.
Revision Date	Enter the date the administrative post changed.
Reason	Enter the reason the end date changed.
Department	Select the department in which the post is held.
Organization	Enter the internal or external organization in which the post was held.

Presentations Page

Use the Presentations page (EG_PRESENTATIONS) to track information about presentations given by employees.

Navigation

Workforce Development, Faculty Events, Track Events, Presentations, Presentations

Image: Presentations page

This example illustrates the fields and controls on the Presentations page.

The screenshot shows a web form titled "Presentations" for the user William Niles. At the top, it displays "EmplID: PU018". Below this, it shows "Tenure/Home Dept: 90310" and "Academic Rank: Professor". To the right, it shows "Tenure Status: On Track". The main form area has a header bar with "Presentations" and navigation links: "Find", "View All", "First", "1 of 1", and "Last". The form fields include: "*Presentation Type:" with a dropdown menu set to "Conference"; "Presentation Date:" with a date picker set to "05/15/1999"; "*Presentation Title:" with a text box containing "The Future of Electrical Engineering"; "Audience/ Function:" with an empty text box; "Location:" with a text box containing "Munich"; and "DescriptionComments:" with a large text area. There are also small icons for adding and deleting records.

Presentation Type

Select the type of presentation the employee performed.

Publications Page

Use the Publications page (EG_PUBLICATIONS) to track information about the employees' published works.

Navigation

Workforce Development, Faculty Events, Track Events, Publications, Publications

Image: Publications page

This example illustrates the fields and controls on the Publications page.

Publications
 William Niles
 EmplID: PU018

Publication Information Find | View All First 1 of 1 Last

*Publication Number: 1 + -

Publication Type: Article Author Type: Author

Publication Title: The Future of Electrical Engineering

Publication Name: Engineering Today

Publisher: Random House

Publication Information

☒ Date Format For PowerPlay Date: 03/11/1996

Volume: 4 Issue: 13 Page Number(s): 14

Notes:

Date Format For PowerPlay and Date

Select to enter the publication date in the format *MM/DD/YYYY*.
 Deselect this check box to enter only the year in the Date field.

Student Advisement Page

Use the Student Advisement page (EG_ADVISEMENT) to track information about any advisement activities.

Navigation

Workforce Development, Faculty Events, Track Events, Student Advisement, Student Advisement

Image: Student Advisement page

This example illustrates the fields and controls on the Student Advisement page.

Student Advisement

William Niles **EmplID:** PU018

Tenure/Home Dept: 90310 **Tenure Status:** On Track

Academic Rank: Professor

Student Advisement Find | View All First 1 of 1 Last

*Student Name: Brady,Shawn + -

Advisement Level: Master's Thesis ▼

From Date: 09/01/1998 31 Thru Date: 10/15/2000 31

Project: Electrical Engineering in the New Millenium

Date Due: 11/30/2000 31

Comments:

Student Name

Enter the student advisee's name in the following format: Last Name,First Name (no spaces).

Teaching Responsibilities Page

Use the Teaching Responsibilities page (EG_TEACHING_RESP) to track faculty teaching responsibilities.

Navigation

Workforce Development, Faculty Events, Track Events, Teaching Responsibilities, Teaching Responsibilities

Image: Teaching Responsibilities page

This example illustrates the fields and controls on the Teaching Responsibilities page.

Teaching Responsibilities

William Niles EmplID: PU018
 Tenure/Home Dept: 90310
 Academic Rank: Professor Tenure Status: On Track

Teaching Responsibilities Find | View All First 1 of 1 Last

*Course ID: 1357
 Title: The Future of Electrical Engineering
 Course Type: Discussion Units: 3
 Term: 1 Year: 2000 ☐ Team Taught Percent: 50.00

Enrollment Information Find | View All First 1 of 1 Last

Enrollment Type Number Enrolled
 Undergraduates 45

Course ID (course identification) Enter the course ID, such as *TF001* (teach).

Term Enter the term in which the course is taught. For example, enter 2 to indicate that the course is taught in the second term.

Team Taught Select if a team of instructors teaches the course.

Percent Enter the percent of the course for which the employee is responsible to teach.

Tracking Committee Information

To set up and track committees, use the Committee Type (EG_COMMITTEE_SETUP), Committees (EG_COMMITTEE_MAINT), and Review Committee Membership (EG_COMM_MBRS) components.

This topic discusses how to:

- Set up committee types.
- Establish committees.
- Assign committee members.
- View employee committees.

Pages Used to Track Committee Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Committee Type	EG_COMMITTEE_TABLE	<ul style="list-style-type: none"> Set Up HCM, Product Related, Workforce Development, Faculty Events, Committee Type, Committee Type Workforce Development, Faculty Events, Define Faculty Events Data, Committee Type, Committee Type 	Maintain committee types and committee roles within each type.
Committee	EG_COMMITTEE	<ul style="list-style-type: none"> Set Up HCM, Product Related, Workforce Development, Faculty Events, Committees, Committee Workforce Development, Faculty Events, Define Faculty Events Data, Committees, Committee 	Establish a committee and attach a committee type.
Committee Members	EG_COMMITT_MEMBRS	<ul style="list-style-type: none"> Set Up HCM, Product Related, Workforce Development, Faculty Events, Committees, Committee Members Workforce Development, Faculty Events, Define Faculty Events Data, Committees, Committee Members 	Assign employees to a committee.
Review Committee Membership	EG_COMM_MBR_VW	Workforce Development, Faculty Events, Track Events, Review Committee Membership, Review Committee Membership	View the committees to which an individual employee belongs. This page is display-only.

Committee Type Page

Use the Committee Type page (EG_COMMITTEE_TABLE) to maintain committee types and committee roles within each type.

Navigation

- Set Up HCM, Product Related, Workforce Development, Faculty Events, Committee Type, Committee Type
- Workforce Development, Faculty Events, Define Faculty Events Data, Committee Type, Committee Type

Image: Committee Type page

This example illustrates the fields and controls on the Committee Type page.

Committee Type

Committee Type: SOCIAL

Committee Type Information Find | View All | First | 1 of 1 | Last

*Effective Date: 01/03/2000 *Status: Active

*Description: Social Events

Short Description: Social

Committee Role Information Find | View All | First | 1 of 1 | Last

*Committee Role: Staff

*Description: Social Planners

Short Description: Planners

Committee Role Information

Committee Role

Select a role in the committee type, such as *Admin Supp* (administrative support).

Note: You can add additional committee roles to new committee types only, but not to existing committee types.

Committee Page

Use the Committee page (EG_COMMITTEE) to establish a committee and attach a committee type.

Navigation

- Set Up HCM, Product Related, Workforce Development, Faculty Events, Committees, Committee
- Workforce Development, Faculty Events, Define Faculty Events Data, Committees, Committee

Image: Committee page

This example illustrates the fields and controls on the Committee page.

The screenshot shows the 'Committee' page with the following details:

- Committee:** SOCIAL
- Committee Type Information:**
 - Effective Date:** 01/03/2000
 - Status:** Active
 - *Committee Name:** Social Events
 - Committee Type:** SOCIAL (with a search icon and 'Social Events' text)
 - Description:** Co-ordinate staff and student social events

Committee Type Information

Committee Type

Select the type of committee, such as *Social*, *Research*, or *Education*.

Committee Members Page

Use the Committee Members page (EG_COMMITT_MEMBRS) to assign employees to a committee.

Navigation

- Set Up HCM, Product Related, Workforce Development, Faculty Events, Committees, Committee Members
- Workforce Development, Faculty Events, Define Faculty Events Data, Committees, Committee Members

Image: Committee Members page

This example illustrates the fields and controls on the Committee Members page.

The screenshot shows the 'Committee Members' page. At the top, there are two tabs: 'Committee' and 'Committee Members'. The 'Committee Members' tab is active. Below the tabs, the page displays information for a specific committee. The 'Committee' field is set to 'SOCIAL Social Events'. Below this, there is a section titled 'Committee Type Information' which includes fields for 'Committee Type' (SOCIAL Social Events), 'Effective Date' (01/03/2000), and 'Status' (Active). Further down is the 'Member Information' section, which contains fields for '*Committee Member Number' (1), 'EmplID' (PU018, linked to William Niles), 'Role' (Social Planners), 'Start Date' (01/04/2000), and 'End Date' (01/03/2001). Navigation links such as 'Find', 'View All', 'First', '1 of 1', and 'Last' are visible at the top of the 'Committee Type Information' and 'Member Information' sections.

Member Information

Committee Member Number

Displays the number of committee members in increments of one for each new row.

Role

Select the role of the committee member.

Start Date and End Date

Enter the beginning and ending dates of the committee membership.

Review Committee Membership Page

Use the Review Committee Membership page (EG_COMM_MBR_VW) to view the committees to which an individual employee belongs.

This page is display-only.

Navigation

Workforce Development, Faculty Events, Track Events, Review Committee Membership, Review Committee Membership

Image: Review Committee Membership page

This example illustrates the fields on the Review Committee Membership page.

Review Committee Membership

[Betty Locherty](#)

Person ID: KU0007

Data			
		Find View All First 1 of 1 Last	
Effective Date:	01/03/2000	Member Nbr:	3
Committee:	SOCIAL Social Events		
Role:	STAF Staff member of Committee		
Start Date:	10/01/2002	End Date:	10/01/2003

Chapter 5

Managing Cases

Defining and Reviewing Employee Cases

This topic discusses how to:

- Define the purpose of a case.
- Review information from specific reviewers.
- View case data and recommendations.
- Review case status.
- Generate Faculty Events History report.

Note: For review information from specific reviewers, only users with access to the current steps in the review process can access this information. For review case status, all users with access to an employee's job record can view this information.

Pages Used to Define and Review Employee Cases

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Identify Employee Case	EG_CASE_REVIEW	Workforce Development, Faculty Events, Manage Cases, Identify Employee Case, Identify Employee Case	Define an employee case. For example, a case could involve a decision to give a faculty member a change in tenure status, or a title change.
Case Information	EG_REVIEW_PATH	Workforce Development, Faculty Events, Manage Cases, Case Information, Case Information	Review case information by selecting the employee and the case ID that you want to review.
Case Progress	EG_CASE_REVIEW_VW	Workforce Development, Faculty Events, Manage Cases, Case Progress, Case Progress	View the less sensitive information from the Identify Employee Case and Case Information pages. This page is display only.

Page Name	Definition Name	Navigation	Usage
Review Case Status	EG_CASE_FIN_VW	Workforce Development, Faculty Events, Manage Cases, Review Case Status, Review Case Status	View the final, approved employee cases. Use this information as a reference when you enter resulting changes in the faculty member's Job Data component. This page displays details from approved cases only.
Faculty Events Hist Rpt (family events history report)	RUNCTL_EVENTS	Workforce Development, Faculty Events, Track Events, Faculty Events Hist Rpt, Faculty Events Hist Rpt	List all tracking events for the employee specified, including activities, administrative posts, appointments and titles, education, training and so on.

Common Elements Used to Define and Review Employee Cases

Tenure/Home Dept (tenure and home department) Displays the employee's home department from the Tenure Data page or the Job Data component.

Academic Rank Displays the employee's current academic rank from the Tenure Data page.

Identify Employee Case Page

Use the Identify Employee Case page (EG_CASE_REVIEW) to define an employee case.

For example, a case could involve a decision to give a faculty member a change in tenure status, or a title change.

Navigation

Workforce Development, Faculty Events, Manage Cases, Identify Employee Case, Identify Employee Case

Image: Identify Employee Case page

This example illustrates the fields and controls on the Identify Employee Case page.

Identify Employee Case

William Niles EmplID: PU018
 Tenure/Home Dept: 90310 Annual Rate: 40000.000
 Academic Rank: Professor Tenure Status: On Track

Case Information Find | View All First 1 of 2 Last

*Case ID: P001 *Case Type: Title *Case Status: Disapprove

Proposed

Tenure Status: Not on Trk Academic Rank:

Title: Professor FTE: 1.000000

Annual Rate: 40000.000 Begin Date: 01/01/1996

☐ Outside Offer Details:

☐ Forward Case Portfolio

Notes/
Portfolio
Description:

Case Information

Case ID (case identification) Enter a unique case identification number for the employee.

Proposed

Tenure Status Displays the employee's tenure status from the Tenure Data page.

Academic Rank Select the proposed academic rank.

FTE (full-time equivalent) Enter the proposed full-time equivalent for this position.

Annual Rate Displays the employee's current annual salary from the Job Data component.

Outside Offer Select if this employee has an outside offer of employment.

Details Enter the name of the organization offering the outside position, or other details about the offer.

Forward Case Portfolio Select to indicate that you have forwarded the case portfolio (paper file) to the reviewers.

Case Information Page

Use the Case Information page (EG_REVIEW_PATH) to review case information by selecting the employee and the case ID that you want to review.

Navigation

Workforce Development, Faculty Events, Manage Cases, Case Information, Case Information

Image: Case Information page

This example illustrates the fields and controls on the Case Information page.

Case Information

William Niles

Tenure/Home Dept: 90310 Electrical Engineering

Academic Rank: Professor

Case ID: P001 Case Type: Title

EmplID: PU018

Annual Rate: 40000.000

Tenure Status: On Track

Case Status: Disapprove

Recommendation Find | View All First 1 of 2 Last

*Review Dept: 90310

*Step: 2

Reviewer Empl ID:

Reviewer Team: Board of Directors

Case Received Date: 06/01/1998

Recommendation Date: 06/01/1998

Recommendation: Disapprove

Forwarded Date: 06/01/1998

Forward Department: 90310 Electrical Engineering

☒ Final Action

Next Case Type: Tenure

Next Review Date: 12/01/1998

Notes:

Annual Rate

Displays the employee's current annual salary from the Job Data component.

Recommendation

Review Dept (review department)

Select the appropriate ID for the department reviewing the case, such as *D2142* (economics department).

Step

Each employee ID and case can have multiple reviewers. Each reviewer receives a step number.

Use the scroll arrow to display multiple reviewers. As you insert rows, the step number increases in increments of one.

Reviewer EmplID (reviewer employee identification)

Select the employee ID of the person reviewing the case.

Reviewer Team

For a team review, enter the team name or department description.

Case Received Date	Enter the date the reviewer received the case.
Recommendation Date	Enter the date the reviewer made the recommendation.
Recommendation	Select the proposed action for the case. For example, select <i>Approve</i> to indicate the reviewer approves the request for tenure.
Forwarded Date	If this is not the final step in the review process, enter the date you forward the case to the next reviewer.
Forward Department	If this is not the final step in the review process, select the department to which you forwarded the case.
Final Action	Select if this is the last reviewer of the case.
Next Case Type and Next Review Date	These fields become available if the Final Action check box is selected. Select the next type of case that you anticipate for this employee, and enter the next review date.

Case Progress Page

Use the Case Progress page (EG_CASE_REVIEW_VW) to view the less sensitive information from the Identify Employee Case and Case Information pages.

This page is display only.

Navigation

Workforce Development, Faculty Events, Manage Cases, Case Progress, Case Progress

Image: Case Progress page

This example illustrates the fields on the Case Progress page.

Case Progress

[William Niles](#)

Tenure/Home Dept:	90310	EmplID:	PU018
Academic Rank:	Professor	Annual Rate:	40000.000
		Tenure Status:	On Track

Proposed		Find View All First 1 of 2 Last	
Case ID:	P001	Case Type:	Title
Case Status:	Disapprove		
Tenure Status:	Not on Trk	Acad Rank:	
Title:	Professor	FTE:	1.000000
Annual Rate:	40000.000	Begin Date:	01/01/1996

Recommendation		Find View All First 1 of 2 Last	
Review Dept:	90310	Step:	2
Reviewer Empl ID:			
Reviewer Team:	Board of Directors		
Case Received Date:	06/01/1998	Recommendation Date:	06/01/1998
Forward Department:	90310	Forward Dt:	06/01/1998
<input checked="" type="checkbox"/> Final Action	Next Case Type:	Tenure	Next Review Date:
			12/01/1998

View the less sensitive information from the Identify Employee Case and Case Information pages. This page is display only.

Review Case Status Page

Use the Review Case Status page (EG_CASE_FIN_VW) to view the final, approved employee cases.

Use this information as a reference when you enter resulting changes in the faculty member's Job Data component. This page displays details from approved cases only.

Navigation

Workforce Development, Faculty Events, Manage Cases, Review Case Status, Review Case Status

Image: Review Case Status page

This example illustrates the fields on the Review Case Status page.

Review Case Status

William Niles

Tenure/Home Dept: 90310

Academic Rank: Professor

EmplID: PU018

Annual Rate: 40000.000

Tenure Status: On Track

Case Final Information Find | View All First 1 of 1 Last

Case ID:	Case Type:	Case Status:
Tenure Status:	Academic Rank:	
Title:		FTE:
Begin Date:		
<input type="checkbox"/> Outside Offer Details:		
Notes:	<input type="text"/>	

View the final, approved employee cases. Use this information as a reference when you enter resulting changes in the faculty member's Job Data component. This page displays details from approved cases only.

Faculty Events Hist Rpt Page

Use the Faculty Events Hist Rpt (family events history report) page (RUNCTL_EVENTS) to list all tracking events for the employee specified, including activities, administrative posts, appointments and titles, education, training and so on.

Navigation

Workforce Development, Faculty Events, Track Events, Faculty Events Hist Rpt, Faculty Events Hist Rpt

Image: Faculty Events Hist Rpt page

This example illustrates the Faculty Events Hist Rpt page.

Faculty Events Hist Rpt

Run Control ID: PS [Report Manager](#) [Process Monitor](#)

Report Request Parameters

EmplID:  William Niles

Run Control ID

Displays the Run Control ID associated with the report format that you selected to access the page.

Run

Select this button to process the Faculty Events History report. The report displays all of the event history for the employee you selected.

Report Request Parameters

EmplID

Enter the employee ID for the faculty member for whom you are generating an event history report.

(CAN) Working with the University and College Academic Staff System (UCASS) Survey Process

Understanding the University and College Academic Staff System (UCASS) Survey Business Process

The Track Faculty Events business process provides the functionality to create the legislatively required Academic Teaching Survey reports by associating PeopleSoft HCM information with Statistics Canada codes. Before you create academic teaching surveys, you must set up some other HR tables that are described below.

This topic discusses:

- Setting up PeopleSoft HR control tables.
- Setting up Track Faculty Events tables.

Setting Up PeopleSoft HCM Control Tables

Set up the following PeopleSoft HCM control tables with Statistics Canada fields listed after each table:

- Department Table: StatsCan - Dept (Statistics Canada Department) and StatsCan - Faculty.
Maintains StatsCan values in the Faculty Code Stats CAN table.
- Job Code component: StatsCan Teaching Survey Codes.
- Company Table: StatsCan Institution Code.
- Country Table: Statistics Canada Location Code.

Note: PeopleSoft delivers this table with the initial Statistics Canada location codes entered. PeopleSoft does not maintain this information.

- Canadian Tax Table: StatsCan Province Code.

Note: PeopleSoft delivers this table with the initial Statistics Canada location codes entered. PeopleSoft does not maintain this information.

- Degree Table: StatsCan Teaching Survey Degree Level.
- Earnings Table: Administrative Stipend Flag.

Related Links

"Setting Up Implementation Defaults (*PeopleSoft HCM 9.2: Application Fundamentals*)"

Setting Up Track Faculty Events Tables

Set up the following Track Faculty Events tables and Statistics Canada fields listed after each table:

- Administrative Rank Table: Rank-Stats Can.
- Administrative Posts Table: Stats Can Responsibility.

Related Links

[Academic Rank Page](#)

[Faculty Events -Administrative Posts Page](#)

Setting Up the University and College Academic Staff System (UCASS) Survey Business Process

To set up the University and College Academic Staff System (UCASS) survey, use the Principal Subjects Taught CAN (HP_STATS_SUBJECTS), Faculty Code Stats CAN (HP_STATS_FACULTY), Non-Operational Fund Table CAN (HP_NON_OP_FUNDS) and Reporting Period Stats CAN (HP_REPORTING_PRD) components.

This topic discusses how to:

- Maintain principal subjects taught codes.
- Define faculty codes.
- Identify non-operational funding sources.
- Maintain report period dates and parameters.

Pages Used to Set Up the Canadian Teaching Surveys Business Process

Page Name	Definition Name	Navigation	Usage
Principal Subjects Taught CAN	HP_STATS_SUBJECTS	Set Up HCM, Product Related, Workforce Development, Faculty Events, Principal Subjects Taught CAN, Principal Subjects Taught CAN	Maintain Statistics Canada principal subjects taught codes and descriptions.
Faculty Code Stats CAN (faculty code Statistics Canada)	HP_STATS_FACULTY	Set Up HCM, Product Related, Workforce Development, Faculty Events, Faculty Code Stats CAN, Faculty Code Stats CAN	Store information regarding faculty codes. The Department Table references this table to associate a faculty with a department.

Page Name	Definition Name	Navigation	Usage
Non-Operational Fund Table	HP_NON_OP_FUNDS	Set Up HCM, Product Related, Commitment Accounting, Fringe Costs, Non-Operational Fund Table CAN, Non-Operational Fund Table	Identify non-operational funding sources. This table is for Ontario Universities only.
Reporting Period Stats CAN (reporting period Statistics Canada)	HP_RPTNG_PRD_PNL	Set Up HCM, Product Related, Workforce Development, Faculty Events, Reporting Period Stats CAN, Reporting Period Stats CAN	Create and maintain report period dates and parameters for the survey run controls. Update the reporting period each reporting year.

Principal Subjects Taught CAN Page

Use the Principal Subjects Taught CAN page (HP_STATS_SUBJECTS) to maintain Statistics Canada principal subjects taught codes and descriptions.

Navigation

Set Up HCM, Product Related, Workforce Development, Faculty Events, Principal Subjects Taught CAN, Principal Subjects Taught CAN

Image: Principal Subjects Taught CAN page

This example illustrates the Principal Subjects Taught CAN page.

Principal Subjects Taught CAN

Stats-Can Acad Teaching Survey

Principal Subject Taught Code: 61200

*Description: Mechanical Engineering

Short Description: Mech. Eng.

Principal Subject Taught Code

Displays the Statistics Canada code for the principal subject taught. Use this code to identify the subjects taught by teaching members in the Canadian Academic Teaching Employment Table on the Employment Data - Employment Information page.

Note: PeopleSoft delivers the initial Statistics Canada Principal Subjects Taught codes. However, PeopleSoft does not maintain this information.

Faculty Code Stats CAN Page

Use the Faculty Code Stats CAN (faculty code Statistics Canada) page (HP_STATS_FACULTY) to store information regarding faculty codes.

The Department Table references this table to associate a faculty with a department.

Navigation

Set Up HCM, Product Related, Workforce Development, Faculty Events, Faculty Code Stats CAN, Faculty Code Stats CAN

Image: Faculty Code Stats CAN page

This example illustrates the Faculty Code Stats CAN page.

Faculty Code Stats CAN

Stats-Can Acad Teaching Survey

Faculty Code: ENG

*Description: Engineering

Short Description: Eng

*Medical/Dental Category: Not Applicable

Faculty Code

Displays the code for a faculty at your educational institution. Use this code to associate faculty with departments in the Department Table.

Medical/Dental Category

Select an option to associate the faculty code with a medical and dental category. The system uses the faculty code from the Department Table to determine which medical and dental category to include in the survey report.

Non-Operational Fund Table Page

Use the Non-Operational Fund Table page (HP_NON_OP_FUNDS) to identify non-operational funding sources.

This table is for Ontario Universities only.

Navigation

Set Up HCM, Product Related, Commitment Accounting, Fringe Costs, Non-Operational Fund Table
CAN, Non-Operational Fund Table

Image: Non-Operational Fund Table page

This example illustrates the Non-Operational Fund Table page.

Non-Operational Fund Table

Non-Operation Fund Account: 000000001 Salaries

Stats-Can Acad Teaching Survey

*Status: Active

Non-Operation Fund Account

Enter an account code. The system uses the non-operational fund account and the account code on the Job Earnings Distribution page to calculate the salary source for each employee in the FT survey report (full-time survey report).

Reporting Period Stats CAN Page

Use the Reporting Period Stats CAN (reporting period Statistics Canada) page (HP_RPTNG_PRD_PNL) to create and maintain report period dates and parameters for the survey run controls.







Update the reporting period each reporting year.

Navigation

Set Up HCM, Product Related, Workforce Development, Faculty Events, Reporting Period Stats CAN, Reporting Period Stats CAN

Image: Reporting Period Stats CAN page

This example illustrates the fields and controls on the Reporting Period Stats CAN page.

Reporting Period Stats CAN	
For Full-Time Survey	
*Start Date: 01/08/1999 	End Date: 01/07/2000
HR Action/Categories	
Sabbatical: CAT_PSB 	Other Paid Leave: CAT_PLA_SC 
Workload Reduction: CAT_PAY 	Unpaid Leave: CAT_LOA 
<div> <div>FT Filename: FT1999</div> <div> <div>HPH900CN Last Run Date:</div> <div>(Faculty Member Data Load)</div> </div> </div>	
<div> <div>HPH901CN Last Run Date: 06/01/2000 (Survey Data Load)</div> </div>	
<div> <div>HPH903CN Last Run Date</div> <div>(Stats-Can Report File)</div> </div>	
<div> <div>HPH905CN Last Run Date</div> <div>(Verification Report)</div> </div>	
For Part-Time Survey	
*Start Date: 01/08/1998 	End Date: 01/07/1999
<div> <div>HPH902CN Last Run Date: 06/14/2002 (Survey Data Load)</div> </div>	
<div> <div>PT Filename: PT1998</div> <div>HPH904CN Last Run Date: (Stats-Can Report File)</div> </div>	

For Full-Time Survey

Start Date and End Date

Enter the start date of the report period for the full-time survey.

The system calculates the end date to be one day less than a year from the start date.

HR Action/Categories

Sabbatical, Other Paid Leave, Workload Reduction, and Unpaid Leave

Select the HR categories that represent Sabbatical, Workload Reduction, Other Paid Leave, or Unpaid Leave. This determines how the system counts HR actions that fall into these categories when creating the survey.

FT Filename (full-time filename)

Enter the name of the FT survey report flat file. Do not include a file suffix.

For Part-Time Survey

Start Date and End Date

Enter the start date of the report period for the PT survey (part-time survey).

The system calculates the end date to be one day less than a year from the start date.

PT Filename (part-time filename) Enter the name of the PT survey report flat file.

Related Links

"Employment Information Page (*PeopleSoft HCM 9.2: Human Resources Administer Workforce*)"

Loading and Modifying Data in the FT Academic Teaching Member Table

This topic provides an overview of the Load FT Teaching Member Data process and discuss how to:

- Load teaching member data.
- Maintain teaching member records.

Pages Used to Load and Modify Data in the FT Academic Teaching Member Table

Page Name	Definition Name	Navigation	Usage
Load FT Teaching Member Data (load full-time teaching member data)	RUNCTL_HPH900CN	Workforce Development, Faculty Events, Load Teaching Data CAN, Load FT Teaching Member Data, Load FT Teaching Member Data	Load teaching member data into the FT Academic Teaching Member Table.
Full-Time Member	HP_FT_TEACH_MEMBER	Workforce Development, Faculty Events, Qualify Academic Teaching CAN, Full-Time Member, Full-Time Member	Modify teaching member records to control the survey results. When you insert a new row on this page, the default field values are from the previous reporting year (except for the Reporting Year field).

Understanding the Load FT Teaching Member Data Process

Before you create the FT survey report, populate the FT Academic Teaching Member Table using the Load FT Member Data process (HPH900CN.SQR). You can modify information in this table to control the results that you report to Statistics Canada.

For example, you can add and delete teaching member records, or you can modify records for more accuracy. However, you cannot delete a teaching member record if the employee has a matching record in the FT Academic Teaching Survey Table.

The Load FT Teaching Member Data process captures data for regular and temporary FT employees with a job record prior, or equal, to October 1 of the reporting year and a job record in the Statistics Canada

Academic Employment Teaching Table. Employees without records in the FT Academic Teaching Member Table for the year being reported do not appear in the FT survey report.

If you rerun the Load FT Teaching Member Data process for a reporting year, you overwrite the records in the FT Academic Teaching Member Table, including records that you added, deleted, or modified manually.

Part-time employees do not have a corresponding table.

Important! The first time you use the University and College Academic Staff System (UCASS) survey business process, you must load your prior year's data into the system. The current year's report derives some information from the previous year's report.

Load FT Teaching Member Data Page

Use the Load FT Teaching Member Data (load full-time teaching member data) page (RUNCTL_HPH900CN) to load teaching member data into the FT Academic Teaching Member Table.

Navigation

Workforce Development, Faculty Events, Load Teaching Data CAN, Load FT Teaching Member Data, Load FT Teaching Member Data

Image: Load FT Teaching Member Data page

This example illustrates the fields and controls on the Load FT Teaching Member Data page.

Reporting Period

Displays the year of the data to load into the FT Academic Teaching Member Table.

Maintain reporting periods on the Report Period page.

Start Date and End Date

Displays the start and end dates of the employment year used to assess twelve months of employment and compensation amounts.

The system calculates the end date to be one day less than a year from the start date.

Maintain start dates on the Report Period page.

Related Links

"Work Location Page (*PeopleSoft HCM 9.2: Human Resources Administer Workforce*)"

Full-Time Member Page

Use the Full-Time Member page (HP_FT_TEACH_MEMBER) to modify teaching member records to control the survey results.

When you insert a new row on this page, the default field values are from the previous reporting year (except for the Reporting Year field).

Navigation

Workforce Development, Faculty Events, Qualify Academic Teaching CAN, Full-Time Member, Full-Time Member

Image: Full-Time Member page

This example illustrates the fields and controls on the Full-Time Member page.

Full-Time Member

William Niles

Person ID: PU018

Member Information

Find | View All | First 1 of 1 | Last

*Reporting Year:

1999

Reportable Employment Record:

0

☐ Canadian Resident Status

☐ Visiting Faculty

*Previous Employment:

Military

Previous Employment Province:

Stats-Can Province Code:

*Previous Employment Country:

BRB

Stats-Can Country Code:

04623

*Salary Status:

Regular

Note: Before using this page, set up the Load FT Teaching Member Data page.

Reporting Year	Displays the year of the data that appears in the survey. If you manually add a new teaching member record, you must enter the reporting year.
Reportable Employment Rcd Nbr (reportable employment record number)	Enter the number of the employment record for the primary FT job being reported. If you loaded the information for this teaching member using the Load FT Teaching Member Data page, this value comes from the Statistics Canada Academic Teaching Employment Table.
Canadian Resident Status	Select this check box if the employee had Canadian resident status at the time of job offer.

Visiting Faculty

Select this check box if the employee is a visiting faculty member.

Previous Employment Province

If the country of the employee's previous employment is Canada, select the province of previous employment.

Loading Data Into the Academic Teaching Survey Tables

This topic provides an overview of the Load Teaching Survey Data process, lists common elements, and discuss how to load FT survey data.

Pages Used to Load Data Into the Academic Teaching Survey Tables

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
FT Survey (full-time survey)	RUNCTL_HPH901CN	Workforce Development, Faculty Events, Load Teaching Data CAN, Load Teaching Survey Data, FT Survey	Load FT survey data for each FT employee who qualifies. Before using this page, complete the Member Data Table for all FT teaching members in the survey.
PT Survey (part-time survey)	RUNCTL_HPH902CN	Workforce Development, Faculty Events, Load Teaching Data CAN, Load Teaching Survey Data, PT Survey	Load PT survey data for each PT employee who qualifies. Before using this page, set up the Statistics Canada Academic Teaching Employment table.

Understanding the Load Teaching Survey Data Process

To load data into the Academic Teaching Survey Tables, use one of the following pages in the Load Teaching Survey Data component:

- FT Survey (HPH901CN.SQR).
- PT Survey (HPH902CN.SQR).

You can load data for all eligible employees, or for individual employees. When you run the process for all employees, the process deletes all data from the Academic Teaching Survey Table for the reporting year and creates new survey data. When you run the process for an individual employee, the process overrides, creates, or deletes the survey for that specific employee.

The system writes process errors and missing data detected during the process to a temporary table. After the process creates all the survey records, it prints an Errors and Missing Data report.

Conditions for FT Survey Data

The Load Teaching Survey Data - FT Survey process creates a FT Academic Teaching Survey record for each employee who meets the following conditions:

- Has a record in the FT Academic Teaching Member Data Table for the reporting year. The employee's job can span the entire reporting year, or it can begin during the reported year. Employees who do not have a teaching member record do not appear in the FT survey report.
- Was employed on October 1 of the reporting year.
- Has a Statistics Canada reporting job (the value of the Survey Report Flag field in the Statistics Canada Academic Teaching Employment table is *FT* or *Both*).

Conditions for PT Survey Data

The Load Teaching Survey Data - PT Survey process creates a PT Academic Teaching Survey record for each employee who meets the following conditions:

- Has any of the following jobs:
 - A PT job during the reporting period.
 - A FT job, but worked fewer than 12 months during the reporting period.
 - A FT job with a compensation frequency that is contract, and the contract period does not span the entire reporting period.
 - A FT job with a compensation frequency that is not contract, and whose appointment (from hire date to end date) does not span the entire reporting year.
- Has a job that was not:
 - Included in the FT survey report for the same reporting year (as defined by the employee record number).
 - Identified by the Collapse Into FT check box in the Statistics Canada Academic Teaching Employment table (effective October 1 of the reporting year).
- Has a Statistics Canada reporting job (the value of the Survey Report Flag field in the Statistics Canada Academic Teaching Employment Table on the Employment Data - Employment Information page is *PT* or *Both*).

Note: The part-time survey has not been required by Statistics Canada since 2004 however PeopleSoft retained the functionality. Recent change to data elements starting in academic year 2009/2010 were not applied to the part-time survey.

Common Elements Used in the Load Teaching Survey Data Process

Reporting Period

Displays the year of the data to load into the FT or PT Academic Teaching Survey Tables.

Start Date and End Date

Displays the start and end dates of the employment year used to assess twelve months of employment and compensation amounts.

The system calculates the end date to be one day less than a year from the start date.

EmpID (employee identification)

Enter an employee ID to create an Academic Teaching Survey record for a specific employee.

FT Survey Page

Use the FT Survey (full-time survey) page (RUNCTL_HPH901CN) to load FT survey data for each FT employee who qualifies.

Before using this page, complete the Member Data Table for all FT teaching members in the survey.

Navigation

Workforce Development, Faculty Events, Load Teaching Data CAN, Load Teaching Survey Data, FT Survey

Image: FT Survey page

This example illustrates the fields and controls on the FT Survey page.

The screenshot shows the FT Survey page with the following elements:

- Page Header:** FT Survey (selected) | PT Survey
- Run Control ID:** 1111
- Navigation Links:** [Report Manager](#), [Process Monitor](#), [Run](#)
- Reporting Period:** 2008
- *Start Date:** 01/01/2008 (calendar icon)
- End Date:** 12/31/2008 (calendar icon)
- EmpID:** (input field with search icon)
- HR Action/Categories:**
 - Sabbatical: CAT_PSB
 - Workload Reduction: CAT_PAY
 - Unpaid Leave: CAT_LOA
 - Other Paid Leave: CAT_PLA_SC
- Administrative Stipend Earnings Codes:**

Earnings Code	Description
1 QBA	Bonus/Award

HR/Action Categories

Sabbatical, Workload Reduction, Unpaid Leave and Other Paid Leave Displays the HR Action/Categories from the Reporting Period Stats CAN page.

Earnings Code

Displays the earnings code used to pay annual stipends, or other honoraria for administrative duties.

Viewing and Modifying Survey Results

This topic lists common elements and discusses how to:

- View FT survey results (Part 1).
- View FT survey results (Part 2).
- View PT survey results (Part 1).
- View PT survey results (Part 2).

Pages Used to View and Modify Academic Teaching Survey Results

Page Name	Definition Name	Navigation	Usage
FT Survey Part 1 (full-time survey part 1)	HP_FT_SURVEY_PNL1	Workforce Development, Faculty Events, Qualify Academic Teaching CAN, Full-Time Surveys, FT Survey Part 1	View survey results for each FT employee. Before using this page, set up the Load Teaching Survey Data - FT Survey page.
FT Survey Part 2 (full-time survey part 2)	HP_FT_SURVEY_PNL2	Workforce Development, Faculty Events, Qualify Academic Teaching CAN, Full-Time Surveys, FT Survey Part 2	View survey results for each FT employee. You can also modify some survey information, but it is better to modify the fields at the source of the data and recreate the surveys.
PT Survey Part 1 (part-time survey part 1)	HP_PT_SURVEY_PNL1	Workforce Development, Faculty Events, Qualify Academic Teaching CAN, Part-Time Surveys, PT Survey Part 1	View survey results for each PT employee. Before using this page, set up the Load Teaching Survey Data - PT Survey page.
PT Survey Part 2 (part-time survey part 2)	HP_PT_APPNTMNT_PNL	Workforce Development, Faculty Events, Qualify Academic Teaching CAN, Part-Time Surveys, PT Survey Part 2	View and modify survey results for each PT employee.

Common Elements Used to View and Modify Academic Teaching Survey Results

Reporting Year

Maintain reporting periods on the Report Period page.

Level of Highest Degree

Displays the Statistics Canada degree level from the Professional Training page.

Maintain degree levels in the Degree Table.

Year of Highest Degree

Displays the year the employee received his or her highest degree from the Professional Training page.

FT Survey Part 1 Page

Use the FT Survey Part 1 (full-time survey part 1) page (HP_FT_SURVEY_PNL1) to view survey results for each FT employee.

Before using this page, set up the Load Teaching Survey Data - FT Survey page.

Navigation

Workforce Development, Faculty Events, Qualify Academic Teaching CAN, Full-Time Surveys, FT Survey Part 1

Image: FT Survey Part 1 page

This example illustrates the fields on the FT Survey Part 1 page.

FT Survey Part 1		FT Survey Part 2	
Ursula Carnes		Person ID: PU020	
FT Survey Information		Find View All First 1 of 1 Last	
Reporting Year:	1999		
Gender:	Female	Year of Birth:	1961
Year of Appointment:	1999	Previous Employment Location:	85921
Reporting Institution:	590111	Previous Employment:	Teaching
Stats-Can Dept Code:	666	Principal Subject:	Veterinary Medicine Specialties
Degree Earned			
Year of First Degree:	1998	Level of Highest Degree:	No Degree/Diploma/Prof.Desgnt
Province of First Degree:	99899	Year of Highest Degree:	1998
		Province of Highest Degree:	99899
Stats-Can Citizenship Country Code:	99999	Immigrtn Status:	Unknown

Note: You can also use Profile Management to capture degree information for employees.

See the *PeopleSoft HCM 9.2: Human Resources Manage Profiles* product documentation.

FT Survey Information

Year of Appointment

Displays the first year the employee appeared in the survey report. If the employee was not reported for a year or more, this field displays the first year the employee resumed reporting.

Previous Employment Location	Displays the employee's previous employment location from the Full-Time Member page.
Reporting Institution	Displays the Statistics Canada reporting institution from the Company Table.
Previous Employment	Displays the employee's previous employment from the Full-Time Member page.
Stats-Can Dept Code (Statistics Canada department code)	Displays the Statistics Canada code associated with the department of the primary reported job from the Department Table.
Degree Earned	
Year of First Degree	Displays the year the employee received his or her first degree from the Professional Training page.
Province of First Degree	Displays the province in which the employee received his or her first degree from the Professional Training page.
Province of Highest Degree	Displays the province in which the employee received his or her highest degree from the Professional Training page.
Stats-Can Citizenship Country Code(Statistics Canada citizenship country code)	Displays the Statistics Canada citizenship country code associated with the employee's country of citizenship from the Citizenship/Passport page.
	Maintain country codes in the Country Table.
Immigrtn Status (immigration status)	Displays the employee's immigration status from the Membership Data page.

FT Survey Part 2 Page

Use the FT Survey Part 2 (full-time survey part 2) page (HP_FT_SURVEY_PNL2) to view survey results for each FT employee.

You can also modify some survey information, but it is better to modify the fields at the source of the data and recreate the surveys.

Navigation

Workforce Development, Faculty Events, Qualify Academic Teaching CAN, Full-Time Surveys, FT Survey Part 2

Image: FT Survey Part 2 page

This example illustrates the fields on the FT Survey Part 2 page.

FT Survey Part 1 **FT Survey Part 2**

Ursula Carnes Person ID: PU020

FT Survey Information Find | View All First 1 of 1 Last

Reporting Year:	1999		
Stats-Can Rank:	Assistant Professor		
Stats-Can Responsibility:	Asst/Assoc Dir, DptHd, Coord, Oth	Medical/Dental Category Not Applicable	
Year of Appointment to Rank:	1999	Type of Appointment:	Non-Vstng Tchg Mbr Non-Tenured

Salary Earned

Actual Salary:	52000	Annual Salary:	52000	Salary Status:	Regular
Administrative Stipends:		Months Not On Leave:	12		
Ontario Final Rate of Salary:		Months on Sabbatical:		Last Load Date:	06/01/2000
Ontario Salary Source:	00	Months on Other Paid Leave:		Last Date Changed:	
Percentage of Load Reduction:		Months on Unpaid Leave:		Last Date Reported:	
		Total Months:	12		

Stats-Can Rank

Displays the Statistics Canada rank from the Academic Rank field in the Job Code table.

Stats-Can Responsibility

Displays the Statistics Canada responsibility from the duties in the Statistics Canada Academic Teaching Employment table.

Year of Appointment to Rank

Displays the first year the employee achieved the reported rank. If the employee was not reported for a year or more, this field displays the first year the employee resumed reporting.

Type of Appointment

Displays the type of appointment, based on information in the Visiting Faculty field on the Full-Time Member page and the Tenure Status field in the Tenure Data page.

Salary Earned

Actual Salary

Displays the actual salary, based on compensation and Job Earnings Distribution information from the reporting year.

The actual salary amount includes contracts, leaves, reduced workloads, and salaries for multiple jobs identified by the Collapse as FT check box in the Statistics Canada Academic Teaching Employment table. The salary does not include administrative stipends or salary increases effective after October 1 of the reporting year.

The system uses decimal months to calculate actual salary, which may result in skewed figures. You can modify this field.

Annual Salary

Displays the actual salary. If the employee has not had a reduced workload and has been working for the entire 12 months of the reporting year, the Annual Salary is the same as the actual salary. The salary does not include administrative stipends or salary increases effective after October 1 of the reporting year.

Salary Status

Displays the salary status from the Full-Time Member page.

Administrative Stipends

Displays the amount paid for stipends and honoraria for administrative duties for the reporting year, based on job earnings distribution records.

The system uses decimal months to calculate administrative stipends, which may result in skewed figures. You can modify this field.

Ontario Final Rate of Salary

Displays the final rate of salary for Ontario-based institutions, based on the annual salary and administrative stipends.

Ontario Salary Source

Displays the salary source for Ontario-based institutions, based on the job earnings distribution amounts distributed to non-operational funding accounts, excluding administrative stipend amounts.

Percentage of Load Reduction

Displays the percentage by which an employee's workload has been reduced, based on the Std Hrs (standard hours) in the Job Data and the Job Code components.

The system calculates this value as follows:

$$\left(\frac{\text{Job Data Std Hrs}}{\text{Job Code Std Hrs}} \right) \times \left(\frac{\text{Number of Reduced Workload Decimal Months}}{\text{Number of Decimal Months in Appointment}} \right)$$

Months Not On Leave, Months On Sabbatical, Months On Other Paid Leave, and Months On Unpaid Leave

Displays the number of months the employee was on this type of leave during the reporting year, based on the Action/Reason field in the Job Data component and the HR Action/Categories on the Reporting Period Stats CAN page.

Related Links

"Employment Information Page (*PeopleSoft HCM 9.2: Human Resources Administer Workforce*)"

PT Survey Part 1 Page

Use the PT Survey Part 1 (part-time survey part 1) page (HP_PT_SURVEY_PNL1) to view survey results for each PT employee.

Before using this page, set up the Load Teaching Survey Data - PT Survey page.

Navigation

Workforce Development, Faculty Events, Qualify Academic Teaching CAN, Part-Time Surveys, PT Survey Part 1

Image: PT Survey Part 1 page

This example illustrates the fields on the PT Survey Part 1 page.

The screenshot displays the PT Survey Part 1 page for Rhonda Starr (Person ID: PU019). The page is divided into sections for personal information, reporting details, and appointment information.

Data		Find View All First 1 of 1 Last
Reporting Year:	1994	
Gender:	Female	Year of Birth: 1958
<input type="checkbox"/> Bargaining Agent		
Degree Earned		
Level of Highest Degree:	No Degree/Diploma/Prof.Desgnt	
Year of Highest Degree:		
Number of Appointments To Be Reported: 1		Last Load Date: 06/14/2002
		Last Date Changed:
		Last Date Reported:

Bargaining Agent

This check box is selected if the employee is a bargaining agent.

Number of Appointments To Be Reported

Displays the total number of PT positions the employee held in the last year. The survey report includes details of only the five positions with longest duration.

PT Survey Part 2 Page

Use the PT Survey Part 2 (part-time survey part 2) page (HP_PT_APPNTMNT_PNL) to view and modify survey results for each PT employee.

Navigation

Workforce Development, Faculty Events, Qualify Academic Teaching CAN, Part-Time Surveys, PT Survey Part 2

Image: PT Survey Part 2 page

This example illustrates the fields on the PT Survey Part 2 page.

The screenshot shows the PT Survey Part 2 page for Rhonda Starr (Person ID: PU019). The page is titled "PT Survey Part 2" and includes a navigation bar with "Find", "View All", "First", "1 of 1", and "Last" links. The main content area displays the following information:

Data	
Reporting Year:	1994
Employment Record:	0
Work Duration Start Date:	01/01/1995
End Date:	09/30/1995
Appointment Status:	Part Time Appointment
Type of Appointment:	Non-Tenure on Track
Principal Subject:	Guidance and Counselling
Salary Paid:	1384
Stats-Can Teaching Load:	0.08
Full-Time Teaching Equivalent:	0.06

Work Duration Start Date

If the job compensation frequency is contract, this field displays the contract effective date from the Contract Data page.

If the job is not contract, this field displays the hire date from the Job Data Table (or the rehire date if the same employment record is used for successive appointments).

End Date

If the job compensation frequency is contract, this field displays the contract end date from the Contract Data page.

If the job is not contract, this field displays the employment termination date or the appointment end date from the Job Data component.

Appointment Status

Displays the employee's appointment status from the Job Data component. Values include:

1: Full-time appointment working less than 12 months in the reporting period.

2: Part-time appointment.

3: Overload appointment of less than 12 months where the employee appeared in the FT survey report for the same reporting year as the PT survey report.

Type of Appointment	Displays the type of appointment, based on the tenure status on the Tenure Data page and the duties in the Statistics Canada Academic Teaching Employment table.
Principal Subject	Displays the principal subject taught by the employee from the Statistics Canada Academic Teaching Employment table. This is the Principal Subject taught as of the appointment end date.
Salary Paid	<p>Displays the salary paid, based on the compensation and Job Earnings Distribution information from the reporting year. The salary paid amount includes contracts, leaves, and reduced workloads.</p> <p>The system uses decimal months to calculate salary paid, which may result in skewed figures. You can modify this field.</p>
Stats Can Teaching Load	Displays the employee's Statistics Canada teaching load from the Statistics Canada Academic Teaching Employment table.
Full-Time Teaching Equivalent	Displays the employee's FT teaching equivalent from the Statistics Canada Academic Teaching Employment table.
Related Links	"Employment Information Page (<i>PeopleSoft HCM 9.2: Human Resources Administer Workforce</i>)"

Creating the Survey Report Flat Files

This topic lists common elements and pages used to create the survey report flat files.

Pages Used to Create the Survey Report Flat Files

Page Name	Definition Name	Navigation	Usage
FT Report File (full-time report file)	RUNCTL_HPH903CN	Workforce Development, Faculty Events, Load Teaching Data CAN, Create Survey Stats CAN, FT Report File	Create the FT survey report flat file.
PT Report File (part-time report file)	RUNCTL_HPH904CN	Workforce Development, Faculty Events, Load Teaching Data CAN, Create Survey Stats CAN, PT Report File	Create the PT survey report flat file.

Common Elements Used to Create the Survey Report Flat Files

Reporting Period	Displays the year of the data to load into the FT or PT survey report flat files.
-------------------------	---

Maintain reporting periods on the Report Period page.

Start Date

Displays the start and end dates of the employment year used to assess twelve months of employment and compensation amounts.

The system calculates the end date to be one day less than a year from the start date.

Maintain start dates on the Report Period page.

Output File Name

Displays the name of the survey report flat file from the Report Period page.

Verifying Survey Results with Statistics Canada

After you submit your FT and PT survey report flat files to Statistics Canada, you receive a summary report.

Page Used to Verify Survey Results

Page Name	Definition Name	Navigation	Usage
FT Survey Stats CAN Rpt (full-time survey Statistics Canada report)	RUNCTL_HPH905CN	Workforce Development, Faculty Events, Load Teaching Data CAN, FT Survey Stats CAN Rpt, FT Survey Stats CAN Rpt	Use the FT Survey Stats CAN Rpt page to compare your results with Statistics Canada's summary.

(AUS) Reporting DETYA for the Australian Higher Education Sector

Understanding DETYA Reporting

DETYA requires regular reporting from the Australian Higher Education sector. The required annual reports are the Full Time and Fractional Staff Report and the Casual Report. Noncompliance with these requirements might cost the institution DETYA grants.

Both reports must be submitted annually by June 26. The reference date for the Full Time and Fractional Staff Report is March 31. The reference date for the Casual Report is December 31 of the preceding year.

Understanding DETYA Calculations and Reference Dates

The categories used by the system are full-time staff, fractional staff, and casual staff. Each category and how it is calculated within the system are discussed below.

Full-Time Staff

A full-time staff member performs a job function in one work sector and one organizational unit under a full-time work contract. A staff member, who at the reference date has a full-time work contract in respect of their current duties, has a full-time equivalence at the reference date of 1.00 or 100%.

Fractional Staff

A staff member working under a full-time work contract but dividing work between different functions or different work sectors could still have a full-time equivalence of 1.00 when all functions or sectors are added. Fractional staff members generally work part-time. However, a fractional staff member could work 60% in one sector and 40% in another.

A staff member working under a fractional full-time work contract has a full-time equivalency based on the ratio between the number of agreed normal work hours and the number of normal work hours required of staff having the same classification type and level but with a full-time work contract.

For example, if a person with a fractional full-time work contract has normal work hours of 30 hours per week while the normal hours for that classification type and level are 40 hours per week, then the full-time equivalency would be 0.75 or 75%. Normal work hours exclude paid or unpaid overtime work hours. If a fractional full time staff member works 40 hours per week despite having a contract defining the standard hours as 30, the employee still has a full time equivalency of .75 or 75%.

Casual Staff

The calculations for full-time equivalence for a full year for a member of staff or group of members of staff with a casual work contract depend on the job function. These legislative guidelines should

be followed to determine what full-time employee (FTE) data to enter for each staff member. This information is entered on the Job Data - Job Information page.

Job Function - Lecturing

1. Determine the total number of *contract* hours (excluding associated hours spent in preparation and marking) for the person or persons during the full year.
2. Divide that number by nine to give an equivalent number of weeks worked.
3. Divide the equivalent number of weeks worked by *N*, where *N* is the number of teaching weeks in a full year for your organization.

Job Function - Supervising, conducting demonstrations, tutorials, or workshops

1. Determine the total number of *contract* hours (excluding associated hours spent in preparation and marking) for the person or persons during the full year.
2. Divide that number by 25 to give an equivalent number of weeks worked.
3. Divide the equivalent number of weeks worked by *N*, where *N* is the number of teaching weeks in a full year, excluding any summer school period.

Job Function - Research, marking (as a single activity), or other work

1. Determine the total number of paid hours for the person or persons during the full year.
2. Divide that number by 35 to give an equivalent number of weeks worked.
3. Divide the equivalent number of weeks worked by 52.

Setting Up DETYA Reporting Codes

To set up DETYA reporting, use the Classification Codes AUS (DETYA_CURR_CLS) and Organization Unit AUS (DETYA_ORG_UNT) components.

This topic discusses how to:

- Maintain classification codes.
- Maintain organizational units.

For the purposes of DETYA reporting, you must complete two tables to define employee classifications and organizational units.

Pages Used to Set Up DETYA Reporting Codes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Classification Codes AUS	DETYA_CLSN_AUS	<ul style="list-style-type: none"> Workforce Development, Faculty Events, Define Faculty Events Data, Classification Codes AUS, Classification Codes AUS Set Up HCM, Product Related, Workforce Development, Faculty Events, Classification Codes AUS, Classification Codes AUS 	Define classification codes specific to DETYA reporting.
Organization Unit AUS	DETYA_ORGUNIT_AUS	<ul style="list-style-type: none"> Workforce Development, Faculty Events, Define Faculty Events Data, Organization Unit AUS, Organization Unit AUS Set Up HCM, Product Related, Workforce Development, Faculty Events, Organization Unit AUS, Organization Unit AUS 	Define organizational units specific to DETYA reporting.

Classification Codes AUS Page

Use the Classification Codes AUS page (DETYA_CLSN_AUS) to define classification codes specific to DETYA reporting.

Navigation

- Workforce Development, Faculty Events, Define Faculty Events Data, Classification Codes AUS, Classification Codes AUS
- Set Up HCM, Product Related, Workforce Development, Faculty Events, Classification Codes AUS, Classification Codes AUS

Image: Classification Codes AUS page

This example illustrates the fields and controls on the Classification Codes AUS page.

Classification Group Code

Select the appropriate classification group corresponding to the code being defined. The group code defines the level of work being performed. DETYA defines these groups and the corresponding codes. Options are *Abv Sr Lec* (above senior lecturer), *Level A*, *Level B*, *Level C* and *Non Acad* (non academic).

Organization Unit AUS Page

Use the Organization Unit AUS page (DETYA_ORGUNIT_AUS) to define organizational units specific to DETYA reporting.

Navigation

- Workforce Development, Faculty Events, Define Faculty Events Data, Organization Unit AUS, Organization Unit AUS
- Set Up HCM, Product Related, Workforce Development, Faculty Events, Organization Unit AUS, Organization Unit AUS

Image: Organization Unit AUS page

This example illustrates the fields and controls on the Organization Unit AUS page.

Effective Date, Description and Short Description

Define the information for each organizational unit.

Generating DETYA Reports Data

DETYA (Department of Education, Training and Youth Affairs) guidelines require reports to be submitted annually by June 26. These reports gather information about staff from the department data and job data components.

Pages Used to Generate DETYA Reports

Page Name	Definition Name	Navigation	Usage
Create DETYA	DETYA_PROCESS	Workforce Development, Faculty Events, Manage DETYA Information AUS, Create DETYA, Create DETYA	Generate the permanent and casual DETYA data. This process saves the data to a temporary table. You can view or modify the details on the Review DETYA page. Select the end date for the report.

Page Name	Definition Name	Navigation	Usage
Create DETYA File	DETYA_FILE	Workforce Development, Faculty Events, Manage DETYA Information AUS, Create DETYA File, Create DETYA File	<p>Generate the electronic file for the Permanent or Casual report after running the data generation process. Confirm that the correct report is running.</p> <p>After running the report, review the error log. Use the Review DETYA page to make any changes.</p>
Review DETYA	DETYA_PRCs_INQ	Workforce Development, Faculty Events, Manage DETYA Information AUS, Review DETYA, Review DETYA	<p>Update DETYA reporting information by individual employees, by employee ID, employee record number, or name. Changes made to this page are picked up by the Create DETYA File process but not updated at the employee level (for example, job, personal data, or education). If you make any changes to this page, you need to rerun the Create DETYA File process.</p>