



PeopleSoft 8.00.01 Human Resources PeopleBook

Tracking Flexible Service

PeopleSoft 8.00.01 Human Resources PeopleBook: Tracking Flexible Service

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TRACKING FLEXIBLE SERVICE

This book provides you with the information you will need for implementing and using the Tracking Flexible Service module of PeopleSoft Human Resources. You can order the online version by requesting SKU HRB8SP1R0, or the hard-copy version by requesting SKU MAHRAr8SP1B 1200.

Whether your organization is a university or a government agency, you need to track an increasingly complex variety of dates related to faculty and employee service - for instance, the date of original hire, adjusted service dates (based on credit for service with another institution or jurisdiction), seniority, or layoff and recall dates. At the same time, you need flexibility in tracking types of service and their associated calculation rules, such as seniority (organizational, departmental, or based on job grade), military, and recognition service.

Flexible Service Tracking, a robust and user-friendly enables you to do all this and more.

Using specific rules and calendars that you set up according to your organization's needs, PeopleSoft calculates these dates and the amount of flexible service accrued. The system can easily be modified to accommodate variations in flexible service rules at different institutions.

CHAPTER 1

Understanding Flexible Service

PeopleSoft's Flexible Service Tracking feature enables you to track your service types based on complex rules that you can set up based on your own organizational needs. You define service dates, service types, and calculation rules to associate with each service type.

Flexible Service Tracking allows you to track employee's service credits by job, stagger the service type start dates, prorate service credits based on FTE count, and prorate service credits based on job action/reasons.

Most organizations have requirements-based on internal procedures and bargaining agreements—that define different types of service and different service calculation rules for different types of eligibility. Other requirements are mandated by local or federal legislation. For instance the Family and Medical Leave Act defines the service date calculation method for compliance with the plan. And the state of Massachusetts includes all periods of service in accrual toward seniority, regardless of breaks.

Flexible Service Tracking gives you great flexibility in setting up your tracking structure to comply with internal and external regulations. You can establish your own parameters for calculating accrued service, and manage as many dates and service types as you need and you can notify participants of important service milestones.

Before You Begin

To use the Flexible Service Tracking feature, you'll need to complete the following steps:

1. Set up service parameters that tell the system how to measure accrued service dates and provide standard dating options.
2. Set up flexible service control tables with different sets of rules depending on your organization's needs.
3. Assign an employee to a service calculation group.
4. Process flexible service and view results.
5. Generate printed reports of accrued service for groups or individual employees.

Setting Up Service Parameters

The Maintain Service Parameters menu contains pages that enable you to define basic parameters such as how a date should be rounded, how a raw date should be converted to a decimal date, and how to calculate a year. You tell the system to assume a certain number of days per month or to use the calendar month. This is also where you define the database alias (*EVENT_DT*) to define the reference to the job history. You can also turn on the application trace, which traces the calculation during a calculation run.



For more information on setting up service parameters, see E&G Setting Up Service Parameters and Service Accrual Control Tables.

Setting Up Service Accrual Control Tables

Methods of calculating and tracking employee service vary among different groups at the same organization and from one organization to the next. The **Administer Flexible Service** functionality provides setup tables where you establish the service rules that best fit your organization. These service rules provide the basis for the flexible service accrual processing.

You will be able to define your service Calendars, establish HR Action/Categories to categorize the job action/reason codes that count toward service accrual, and define your date rounding options.

The service rules become part of a Definition Name, which you then assign to a *service type*. The system processes service types based on the service rules defined within the Definition Name. Grouping service rules together under a Definition Name gives you and your organization flexibility when 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 that will have the same calculation rules applied to their service accrual process.

The setup tables that you use to establish service accrual rules are shared with the Tracking Tenure feature. These tables are documented in E&G Setting Up Service Parameters and Service Accrual Control Tables, of the *Application Fundamentals for PeopleSoft HRMS PeopleBook*.

Setting Flexible Service Tracking Defaults

The calculation groups you define provide the service types and processing rules that will be associated with either a single employee or groups of employees.

You can set defaults on the Position Data table and the Job Code table to associate a position and/or a job code with a calculation group. By doing this, you are providing a default calculation group for all employees assigned to that position or job code.

Setting Up the Position Data Table

If you are using PeopleSoft's Position Management feature, you can assign a default service calculation group at the Position level.

Position Management is used mostly by organizations that rarely change their structure or position definitions. This feature enables you to create Position Numbers (established in the Position Data Table) that define specific information about a given position. When you hire new employees, you can specify the code for their job position. All the information defined for that position in the Position Data Table - including the service calculation group-defaults onto their employment record.

By selecting a service calculation group on the Position Data Table you are associating that calculation group with the selected Position Number.

To provide the default for flexible service tracking to the Position Data Table select the **Calc Group (Flex Service)** for which you want accrued service automatically applied on the Position Data - Specific Information page.



For more information on the Position Data Table, see *Driving Your System by Employee or Position and Maintaining Position Data*.

Setting Up the Job Code Table

As in the Position Data table, you can also set a default calculation group for flexible service tracking at the Job Code Table level.

By doing this, you are associating *all employees assigned to a job code* with the default calculation group. The calculation group defaults to the employee's employment record-first from the Position Data table, if present, and then from the Job Code Table.

You set default calculation groups at the job code level on the Job Code Table -Evaluation Criteria page.

To provide the default for flexible service tracking to the Job Code Table select the Service Calc Group (Service Calculation Group) for which you want accrued service automatically applied. This calculation group will apply to any employee who is assigned this specific Job Code.



For more information on the Job Code Table, see *Classifying Jobs*.

CHAPTER 2

Assigning an Employee to a Calculation Group

In order for an employee to accrue service credits, the employee must be assigned to a calculation group. You do this on the employee's employment record, in the Job Data component.

Service can be accrued separately for each concurrent job the employee has.

Belonging to a service calculation group does not necessarily qualify an employee to accrue credits for a particular service type. Other factors that contribute would be the eligibility criteria for the service type (full time, part time, etc.) and the job action/reason codes included in the HR Category within the service type's definition name.

To assign an employee to Flexible Service, you'll consider the following:

- Establish which calculation group the employee should belong to;
- Establish whether the employee has previous startup credits;
- Establish any exceptions the employee might have, based on the calculation group he or she belongs to. (For example, each service type they accrue credits into may be based on different service accrual start dates.)
- Review any related jobs the employee might have that are eligible for flexible service.

Selecting a Calculation Group

Use the Employment Information page to specify a calculation group for the employee and the full time equivalent value you want to use for service accrual. Enter these values in the fields Calc Group (Flex Service) and FTE for Service Accruals.



Important! You must use this page to enter the Calculation Group and the FTE value for the employee if you want the employee included in the flexible service accrual process.

1. Select a service calculation group for this employee in the Calc Group (Flex Service) field. For instance, you might select the calculation group *ADMIN* for a department administrator.

Defaults for the Calculation Group are in the following order:

1. Position Data Table, if present;

2. Job Code Table, if present;
3. User-supplied.



Calculation groups are created and maintained on the Calculation Group page. For more information, see Calculation Group Page.

2. In the FTE for Service Accruals field, enter the full time equivalent value to be used in prorating the employee's accrued service.

The FTE count will default from the job record for the initial entry of the Calculation Group. This FTE value is used in conjunction with the prorate method and value you specified on the Service Rules component.

Entering Startup Credits and Exceptions on the Service Detail Page

Use the Service Detail page to enter an employee's *startup credits* and record *exceptions* to the employee's accrual process.

You do not have to enter an employee on the Service Detail page if the employee does not have any processing exceptions.

The start dates for processing the service types will default from the run control page if not entered here.

Enter employee information on this page *if* any of the following is true:

- The employee has a startup credit you want to include in their service accrual for a service type within a calculation group;

The **Startup Cr** field is defined for each service type. This is where you include prior service credits for the employee - for example, credits from another organization that you want carried over.

- The employee has a Service Type that will start accruing credits on a different date than what is entered on the run control page.

This would be for the initial accrual process only. Once you have indicated when a service type is to start accruing credits, each process thereafter accrues service credits based on the last calendar period processed for the employee.

- The employee isn't entitled to accrue service credits for one or more of the service types within the calculation group they belong to.
 - Enter the service type on this page and select the **Override** check box. This excludes the service type from accruing credits for the employee.
- An employee belongs to a calculation group that has a service type with eligibility criteria differing from the employee's regular/temporary-full time/part time status, and you want the

employee to accrue service credits for that service type.

- For example, if the service type's eligibility criteria state that only *full time* employees accrue service credits, and you want a specific *part time* employee to be able to accrue credits, you can override the eligibility criteria for the employee here. By entering the service type on this page for the employee, you are overriding the default on the Calculation Group's service type and the employee will accrue credits even though the employee is part time.

Service Detail Page

Usage	Use the Service Detail page to enter an employee's startup credits and record exceptions to the employee's accrual process.
Object Name	EG_FLX_SVC_DT
Navigation	Administer Workforce, Administer Flexible Service, Use, Flexible Service, Service Detail
Prerequisites	You must have assigned a calculation group to the employee.
Access Requirements	Enter an Employee ID and a Calculation Group.

Service Detail

EmpID: PA013 Flynt,Mildred

Calc Group: SRVC Continuous Service Orig Hire: 03/01/1995 Per Status: E Employee

Flexible Service Dates						View All	First	1-2 of 2	Last
*Service Type	Start Date	Service	(Yrs/Months/Days)	Last Proc Dt	Startup Cr				
CONTSRV	01/01/1995	3.830000	(3 / 9 / 29)	12/31/1998	0.000000	+ -			
*Change Reason: N		On: 06/06/2000		Notes	<input type="checkbox"/> Override Calc?				
UNION	01/01/1995	3.830000	(3 / 9 / 29)	12/31/1998	0.000000	+ -			
*Change Reason: N		On: 06/06/2000		Notes	<input type="checkbox"/> Override Calc?				

Service Detail page

EmpID/Calc Group/Orig Hire/Per Status These fields are display-only.

Service Type Select the service type for the employee you want to enter a processing exception for.

Only service types valid for the selected calculation group are displayed.

Start Date	<p>Enter the Start Date when you want credits to begin accruing for this service type.</p> <p>Each service type can have a different start date. However, these dates must fall within the range of the dates on the Calendar used by the Calculation Group.</p>
Service	<p>Displays the total accrued service credit amount.</p> <p>The value displayed here is a result of an <i>Update to History</i> run process and reflects the actual credit amount.</p>
(Yrs/Months/Days)	<p>Displays the total accrued credits in terms of years, months, and days. The service credits have been converted to service years/months/days from the accrued credit value.</p> <p>The values displayed here are a result of the <i>Update to History</i> run process and reflect an actual length of time.</p>
Last Proc Dt	<p>Displays the date the service accrual process has accrued to. This is the To Date you entered on the run control page.</p>
Startup Cr	<p>Enter the credit amounts the employee has previously accrued from another job or organization. This value will be included in the service accrual process and added to the employee's total credits.</p> <p>The startup credit is based on a Yearly unit, so you enter six months' credit as 0.50.</p>
Override	<p>Check this box to <i>exclude</i> the service type from the service accrual process for this employee.</p> <p>If the check box is turned <i>off</i> (left blank) the service type will be included in the service accrual process for the employee.</p>
Notes	<p>Enter any supplementary notes that pertain to the service type entered for the employee. For instance, you may want to state where the employee earned prior startup credits.</p>
Change Reason	<p>If you enter a service type, change the start date for the service type, or enter a startup credit on this page, you may want to record the reason for any changes made.</p> <p>Select a value from the available options. Valid values include, but aren't limited to, <i>Retroactive Adjustment</i>, <i>Other</i>, <i>Error Correction</i>, etc. The system is delivered with these values. You can add values on the Translate Table.</p>

Reviewing Related Jobs for Flexible Service

The Related Job for Flex Service page displays all jobs and/or positions the employee holds that are eligible to accrue service credits-in other words, all jobs or positions the employee holds that have a calculation group assigned to them.

This display page is useful for viewing which employees are currently included in flexible service tracking and which aren't. It provides you with an overview of the calculation groups the employee belongs to for each job/position held. You can easily keep track of which calculation groups your employees are accruing flexible service credits for.

Related Job for Flex Service Page

Usage	Use the Related Job for Flex Service page to display all jobs and/or positions the employee holds that are eligible to accrue service credits.
Object Name	EG_FLX_JOBS
Navigation	Administer Workforce, Administer Flexible Service, Inquire, Related Jobs for Flex Service, Related Job for Flex Service
Access Requirements	Enter an Employee ID.

Related Job for Flex Service						
EmpID:	PA013	Flynt,Mildred				
Orig Hire:	03/01/1995	Per Status:	E	Employee		
Jobs Counted for Flexible Service						
				View All	First	1 of 1
				1 of 1	Last	
Emp Rcd#	Service Calc Group	FTE For Accrual	Department	Job Code	Position	Current
0	SRVC	1.00	PGV1002 Bus & Regulatory Svc	PA1801 Commissioner - Bus & Reg Svc	PUA8020	

Related Job for Flex Service page

- EmpID** Displays the employee's ID number.
- Orig Hire** Displays the date the employee was hired.
- Per Status** Displays the employee's personnel status.

Jobs Counted for Flexible Services

Empl Rcd#	Displays the employee's employment record number.
Service Calc Group	Displays the service calculation group the employee belongs to within the job/position.
FTE for Accrual	Displays the employee's full time equivalent value. An employee working 80 percent of a normal full time schedule has an FTE of .80 . The FTE for Accrual value is maintained on the Employment Information page.
Department	Displays the department the employee is assigned to within the job/position.
Job Code	Displays the employee's job code.
Position	Displays the employee's position number.

Processing Flexible Service and Viewing Results

Once you have set up your service parameters and the flexible service control tables, and you have assigned employees to calculation groups, you are ready to run the flexible service calculation process.

You run the process from the Service Calc Process page. You will probably want to run this batch process on a periodic basis—for example, at the end of a service year or a service computational (calendar) period—to calculate the accrued service record for each employee.

Calculating Flexible Service

Calculation flexible service is a two step process. First, you calculate service credits in *Normal Run* mode for a specific time period, such as a semester or fiscal year. You can calculate service credits for a specified calculation group or an individual employee. You can also calculate service credits for all service types within the calculation group, or select just one service type to process. You view the results using an Inquiry page called the Flex Service Calc. Summary page. A *Normal Run* produces the results in a temporary file, giving you the flexibility to rerun the process until you are satisfied with the results. When you are satisfied you can run an *Update to History*.

The second step is to run the process in *Update to History* mode to commit the service credits to history. *Update to History* takes the temporary file created in the *Normal Run* and applies it to the employee's service history. You view the results on the Service History page. Once this data has been committed to history, the temporary file created during the Normal Run for that particular process is deleted.



After you execute either the *Normal Run* or the *Update to History*, we recommend that you view any messages about the batch processing using the Message Log and Periodic Results pages. Viewing messages enables you to make sure the employee's service credits have been properly processed before you commit them to history by running *Update to History*.

Understanding Processing Modes

Before you run the flexible service calculations, it is important to understand the processing modes available to you, how these modes differ and when you would use each one.

There are three processing modes available to process service credits:

Normal Run

The **Normal Run** processing mode calculates accrued service credits for a specific time period and stores the results in a temporary file. You specify the time period you want to process service credits for on the Service Calc Process run control page when you enter the From and To dates. You would use **Normal Run** on a periodic basis, such as after each of the calendar periods—for example, a 10-month calendar year with two calendar periods of five months each. You may want to run the process after each five-month calendar period.

You can rerun the **Normal Run** process as often as you want, until you are satisfied with the results. A **Normal Run** doesn't affect the employee's existing service history data. You view the temporary data using the Flex Service Calc Summary inquiry page. Or you can print the Service Calc Report for a listing of the service calculations.



If you process a single employee, we recommend that you only do the **Normal Run** for that employee and then do the **Update to History** for all employees within a calculation group at the same time.



You typically create the temporary file from the **Normal Run** for a specified period of time, then commit this data to history by running **Update to History** for the same period.

Update to History

The **Update to History** processing mode commits the accrued service credits to history. **Update to History** takes the temporary file created by the **Normal Run** and applies it to the employee's service history. The process creates a service history record (for the employee) for each calendar period that falls within the processing From and To dates you entered on the run control page. After the data is committed to history, the temporary file created by the **Normal Run** for that processing period is deleted.



Important! When running **Update to History**, remember to use the same Run Control ID you used in the **Normal Run** (because **Update to History** commits to history the data generated during the **Normal Run**). This means that the processing dates and calculation group will be identical for both batch processes. By using the same Run Control ID, you ensure that the processing dates are the same.

Delete_Rebuild History

The **Delete_Rebuild History** processing mode deletes previously committed service history data. **Delete_Rebuild History** enables you to delete service credits that have been committed to history for the time period (the From and To dates) you specify on the run control page.

This processing mode recreates the service credits in a temporary file, for the time period and calculation group you specify. It will then flag the existing history data for the same time period. The batch process will use this flag in a later process to identify which history data to delete.

However, the history data isn't deleted until you decide to do so. You can now compare the newly created temporary file against the existing flagged history data. If you determine that the new temporary data is correct, you can run the *Update to History* for the same time period and calculation group. The process recognizes the flagged history data, deletes this data, and re-creates the history data from the temporary file that was created in the *Delete_Rebuild History* run. You probably won't need to use this processing mode very often.

If your history data becomes corrupt, this mode enables you to rebuild the employee's service history. For example, you may occasionally make manual adjustments to the service history data on the Service History page. In the event that any adjustments were made incorrectly and not noticed until after you run several *Update to History* processes, you may want to consider rebuilding your history data.



A *Delete_Rebuild History* run will not re-accrue manual adjustments previously entered on the Service History page. You'll have to reenter these adjustments after the data has been committed to history again. However, the system will recalculate all startup credits.

[none]

You may want to set up your run control page, but not execute the process until later. If you do this, we recommend you save the run control using the *[none]* option.

Running the Flexible Service Calculation Process

Use the Service Calc Process page to process service credits for a specified time period and calculation group. You have the ability to process all service types within the calculation group or just one service type, and you can process one employee rather than all employees within the calculation group.

Suppose your organization has set up a calculation group known as *CLER* (clerical workers). This group includes three service types: *UNION*, *AWARD5* (five year service award), and *SENIORITY*. When you run the flexible service accrual process for this calculation group, each employee assigned to the calculation group who doesn't have exceptions listed in the Service Detail page will accrue for all three service types, beginning at the From date you establish on the run control page.

The batch process verifies the service types within the calculation group to determine which service types will be processed. It then checks for any employee exceptions entered on the Service Detail page to determine which service types to process for those employees.

You have the option of executing three processing modes.

1. **Normal Run**-Calculates the service credits and creates a temporary file where you can view the results using the Flexible Service Calculation Summary page (an Inquiry page) until you are satisfied with the results.
2. **Update to History**-Takes the temporary file created in the **Normal Run** and applies data to the employee's service history. You view the results using the Service History page.
3. **Delete_Rebuild History**-Re-creates previously committed service history in a temporary file and gives you the option of deleting the existing service history and overwriting it with the newly created service data in the temporary file.

Service Calc Process Page

Usage	Use the Service Calc Process page to process service credits for a specified time period and calculation group.
Object Name	RUNCTL_EGPP02
Navigation	Administer Workforce, Administer Flexible Service, Process, Service Calc Process, Service Calc Process
Access Requirements	Enter a Run Control ID.

The screenshot shows the 'Service Calc Process' page with the following fields and options:

- Run Control ID:** 142
- Buttons:** Report Manager, Process Monitor, Run
- From Date:** 01/01/2000
- To Date:** 06/30/2000
- Calculation Name:** 142
- *Calc Group:** SRVC (Continuous Service)
- Calc all Service Types**
- Service Type:** [Empty field]
- EmpID:** PA013 (Flynt, Mildred)
- Service Date Processing Type:**
 - Periodic Processing Mode - E&G
 - Normal Run (Selected)
 - Delete old Calc Results
 - Delete & Reload History
 - Commit to History

Service Calc Process page

The Service Calc Process page includes the following display-only fields:

Run Control ID Displays the **Run Control ID**.

From Date and To Date

Enter the time period for the calculation in the **From Date** and **To Date** fields. These dates must exactly match a computational period of the calendar used by the **Calc Group** 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 may want to calculate tenure for an academic year that consists of two computational periods: **01/01/98** to **06/31/98**, and **07/01/98** to **12/31/98**. Therefore, you enter **01/01/98** as the **From Date** and **12/31/98** as the **To Date**. The process creates a service history for each computational period.

Calc Group (calculation group)

Displays the **Run Control ID**.

Calculation Name

This field defaults from the Run Control ID that you entered in the **Add** or search dialog box. It is used internally by the batch process.

Calc All Service Types (calculate all service types)

Select the **Calc All Service Types** check box if you want to accrue credits for all service types within the calculation group being processed.

Service Type

Select the **Service Type** for which you want to accrue service credits.

This field is unavailable if you have selected the **Calc All Service Types** field above.

EmplID

Select an employee ID if you want to run the calculation process for a single employee within the calculation group being processed.

Service Dates Processing Type

Select the **Period Processing Mode - E&G** you would like. The check boxes to the right of this field reflect the option you choose. The period processing mode options are listed below.

Delete & Rebuild History

This mode deletes an employee's tenure service history and rebuilds it. Use this mode to regenerate tenure service for an individual employee (or all employees) within a tenure calculation group. When you select this option, the system will select the **Delete and Reload Service History** check box.

Warning! Be careful when you run this mode; it removes all service history based on the tenure calculation group or the employee you specified.

Normal Run

Use ***Normal Run*** to calculate tenure service for a specific time period, such as a recently ended semester. You can also run the calculation for the academic year and process both semesters. The existing service history for an employee isn't purged when you run this mode. When you select this option, the system will select the **Delete old Calc Results** check box.

Doing a ***Normal Run*** of the tenure calculation process creates temporary tenure accrual records, which you can view online in the Flexible Service Calculation Summary page. The calculation is purged once you run the process in ***Update to History*** mode.

Update to History

This mode updates the tenure service totals on the employee tenure data record and adds the new service details to the employee Service History page. The input data for an ***Update to History*** run is the results of the ***Normal Run***. When you select this option, the system will select the **Commit to History** check box.

When you run the ***Update to History*** process, the system commits the calculated tenure information to the employee's service history and updates the corresponding dates on the employee's record. You can view updated tenure information on the Service History page.

The **Run Control ID** you use for the ***Update to History*** run must be identical to the one you use for the ***Normal Run***. Both the **Run Control ID** and the computational period must be the same.

Click **Run** to run this request. Process Scheduler runs the Employee Service Listing process at user-defined intervals.



For more information about Process Scheduler, see Process Scheduler.

How the Calculation Process Works

The system processes each flexible service type in the calculation group you selected as follows:

Determining an employee's eligibility for a flexible service type

First, the system determines if the employee has a service detail record in order to establish if there is an **Override** flag set against one of the service types. If the employee has a service detail record and the service type **Override** flag is *not* selected on the Service Detail page, the system calculates accrued service for all service types for the employee.

To determine the eligibility criteria for processing, the batch process first establishes if the employee has a service detail record. If the employee doesn't, the system checks against the eligibility criteria defined for the service type in the Calculation Group page to determine the employee's eligibility. If the employee is eligible, the process will continue for that employee.

Eligibility criteria refers to part time, full time, etc.

How does the system determine if the employee is eligible if the employee doesn't have a service detail record?

This refers to the case where you haven't set up any processing exceptions for the employee. When you assign a service type to a calculation group, you define the eligibility criteria—full time and/or part time, permanent and/or temporary. Before running the batch process, the system searches the employee's job history records within the specified time period to determine if he or she is eligible.



The program checks for a partial period—for example, an employee may have changed from part time to full time and become eligible for service accrual halfway through the service accrual processing period. The system calculates service for the partial period the employee is eligible.

Running a calculation

The system calculates service based on the **From** and **To** dates you specify on the Service Calc Process run control page. It creates a service history record for the employee for each calendar period that falls within the specified **From** and **To** dates.

The process will create a service history for each calendar period.

- The system searches the employee's job history for a calendar period to determine the service credit, and uses the elapsed time method by measuring the time between two dates. In the case of job history, it will measure the time between the effective dates of two job records and apply the service and eligibility rules included under the employee's flexible service type.
- Once the accrual process has run for a flexible service type for an employee, the system performs *proration by FTE* on the calculated service if prompted to do so by the proration limits established on the Service Definition page.

Then it writes the service history to a temporary flexible service history file, based on the calendar periods you set up on the Calendar page. This temporary file is distinct from the final service history file.

Updating flexible service detail and history

- The batch program processes employees by selecting their service history for each flexible service type from the temporary service history file.
- If the employee already has a Service Detail record, the process adds the total calculated service amount to the Service field, and updates the **Last Proc Date** field to show the **To Date** of the accrual process.



The service amount is rounded to two decimal places. The program also converts the service amount to *number of years, months, and days* format, using the conversion rules set up in the service definition for the flexible service type. The employee service history will also be updated with the new service details from the temporary file.

If the employee doesn't have a Service Detail record, the program will create the record and the service history details.

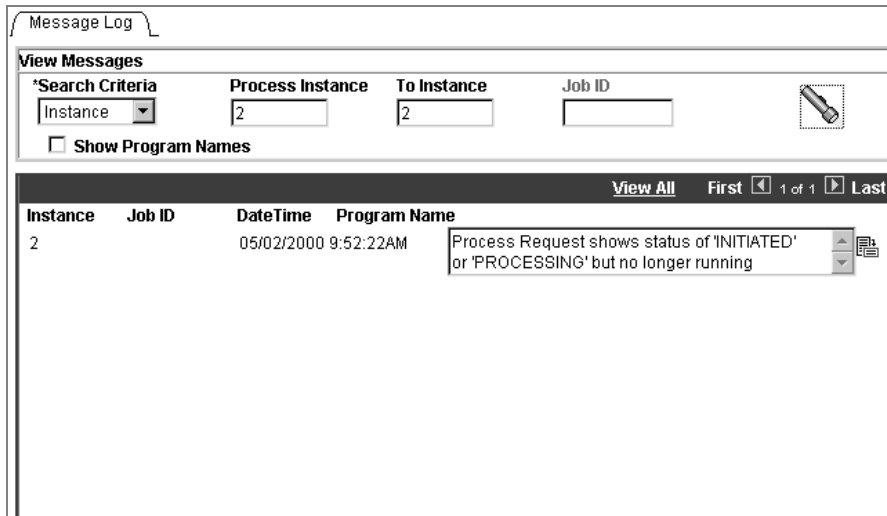
Finally, the employee's service details are purged from the temporary service history file. They are no longer needed.

Viewing the Message Log

Use the Message Log page to view dated and timed information generated during batch calculation processes. This page tracks errors in processes and searches for error messages associated with a particular run.

Message Log Page

Usage	Use the Message Log page to view dated and timed information generated during batch calculation processes. Tracking Faculty Events also uses this page.
Navigation	<ul style="list-style-type: none"> • Administer Workforce, Administer Flexible Service, Inquire, Message Log, Message Log • Develop Workforce, Manage Faculty Events, Inquire, Message Log, Message Log
Prerequisites	You must have run a Service Calculation process.
Access Requirements	None.



Message Log page

You can call up any message associated with a run control process. (Note that messages will vary depending on the feature and process you are running.)

Use the following controls to set up your inquiry:

- Search Criteria** Select **Instance**, **Job ID** or **Both** as the focus of the inquiry.

- Process Instance** If you selected **Instance** or **Both** for the **Search Criteria**, enter the number of the first **Process Instance** you want information on. (If you selected **Job ID** only, this field is unavailable for entry.)

- To Instance** As soon as you enter a **Process Instance**, the **To Instance** defaults to the same number.

If you want to include more than one instance, enter the number of the last instance you want information on.

(If you selected **Job ID** only, this field is unavailable for entry.)

- Job ID** Enter the batch program name.

- Show Program Names** Select this check box if you want to see the name of the program or subprogram that generated the error message.

The program name will be displayed beneath the **Instance** number.

Click the **Search** button (flashlight) to display the **Message Log**, which includes the following information for the selected search criteria:

- Instance/Job ID** Displays the process scheduler **Instance #** and/or the batch program/subprogram name for each message.
- Date/Time/Program** Displays the date and time the program was run.

The text area displays the error message. Click the **Detail** button (magnifying glass) to view details about the error message. Use the scroll bar to view more messages.

Viewing Periodic Results

The Periodic Results page displays the results of the process run. You can verify here what was processed and whether the run was successful or not.

Periodic Results Page

Usage	Use the Periodic Process page to review the results of the process run. Tracking Faculty Events also uses this page.
Navigation	<ul style="list-style-type: none"> • Administer Workforce, Administer Flexible Service, Inquire, Periodic Results, Periodic Process • Develop Workforce, Manage Faculty Events, Inquire, Tenure Run Results, Periodic Process
Prerequisites	You must have run a Service Calculation process.
Access Requirements	Enter a Run Control ID, Process Instance, and Periodic Run Status.

Periodic Process

Run Control ID: 142	Run Date: 08/28/2000	
Process Instance: 83	Run Status: Complete with no Errors	
To Date: 08/30/2000	Periodic Cycle:	Process Mode: Normal Run
Service Calculation Group: SRVC	ID: PA013	Flynt,Mildred
Calculate All Groups: N		
Delete & Reload History: N	Delete old Calc Results: Y	Commit to History: N

[View All](#) First ◀ 1 of 2 ▶ Last

Calc Group: SRVC	Employees Processed: 1	Employees with Errors: 0
Service Type: CONTSRV		

Employees with Errors [View All](#) First ◀ 1 of 1 ▶ Last

Periodic Process page

Run Control ID	Displays the Run Control ID from the run control page.
Process Instance	Displays the process instance assigned by the Process Scheduler.
Run Date	Displays the date the service accrual process was run.
Run Status	Displays a message indicating if the process ran with or without errors.
To Date	Displays the end date of the period covered in this process run. This is the date you entered on the run control page.
Periodic Cycle	Displays the periodic cycle you established for this Run Control ID.
Process Mode	Displays the processing mode you selected on the Service Calc Process run control page.
Service Calculation Group	Displays the calculation group the accrual process was run for.
ID	If you are running the calculation for an individual employee, this field displays the employee's ID number. Otherwise, the field ID will not appear on the page.
Calculate All Groups	For future use. Defaults to <i>N</i> .
Delete & Reload History/Delete Old Calc Results/Commit to History	Each of these fields displays <i>Y</i> (Yes) or <i>N</i> (No), depending on the processing mode you chose for this calculation on the Service Calc Process page.
Calc Group	Displays the calculation group the accrual process was run for.
Service Type	Displays the Service Type within the calculation group that was processed.
Employees Processed	Displays the number of employees processed during this accrual process.
Employees with Errors	Displays the number of employees that had errors during the accrual process. Service credits would not be calculated for these employees.

Viewing the Flexible Service Calculation Summary

The Flexible Service Calculation Summary page displays the (temporary) results from a **Normal Run** of the flexible service accrual process. Detail data from a **Normal Run** isn't updated to the employee's flexible service history. It resides in a temporary file until you run an **Update to History**. The system then deletes the data from the temporary file, and you can no longer view it on this page.



When you run the flexible service accrual process in *Update to History* mode, the service details appear on the Service Detail and Service History pages. The Service Detail page displays the total accrued service credits only, no details.

Flex Calc. Summ. Page

Usage	Use the Flex Calc. Summ. (flexible service calculation summary) page to review the results from a Normal Run of the flexible service accrual process.
Object Name	EG_CLC_FLX_SUM
Navigation	Administer Workforce, Administer Flexible Service, Inquire, Flex Service Calc. Summary, Flex Service Calc Summ.
Prerequisites	You must have run a Service Calculation process.
Access Requirements	Enter a Calculation Name, Employee ID, Service Calculation Group, and Function Result Name.

Flex Calc. Summ.					
User ID: PS		Run Control ID: 142			
Calculation Name: 142		From Date: 01/01/2000		To Date: 06/30/2000	
View All First 1-2 of 4 Last					
Begin/End Date	Service Amt without Breaks	Service Amt with Breaks	Service Adjustment	Accrued Service	Accum Breaks
07/01/1998	0.500000	0.500000	0.000000	3.830000	0.000000
12/31/1998	Action: (BFW)	Total (#yrs/mths/days)	3/ 9/	29	Breaks: 0.000000
EmplID:	PA013	Flynt,Mildred	SRVC	CONTSRV	
01/01/1999	0.500000	0.500000	0.000000	4.330000	0.000000
06/30/1999	Action: HIR ()	Total (#yrs/mths/days)	4/ 3/	29	Breaks: 0.000000
EmplID:	PA013	Flynt,Mildred	SRVC	CONTSRV	

Flex Calc. Summ. page

The Flex Service Calc. Summary page includes the following display-only fields:

- Calculation Name** Displays the name of the Run Control ID.
- Periodic Cycle** Displays the periodic cycle chosen on the Service Calc Process run control page.
- Run Control ID** Displays the Run Control ID for this process.
- From Date** Displays the From date entered on the run control page. This reflects the beginning date for this process.

To Date	Displays the To date entered on the run control page. This reflects the ending date for this process.
Begin/End Date	Displays the begin and end dates that service credits were accrued for. This displays one line for each of the calendar period dates that fall within the From and To Dates you requested on the run control page.
Service Amt without Breaks	Displays the amount of accrued service without breaks that counts toward flexible service.
Service Amt with Breaks	Displays the amount of accrued flexible service with breaks that counts toward flexible service.
Service Adjustment	Displays the adjustment amount entered on the Service History page.
Accrued Service	Displays the total amount of accrued service.
Accum Breaks	Displays the total amount of breaks in service.
Action	Displays the job action code that contributed to the service accrual for the calendar period.
Total (#yrs/mths/days)	Displays the total years, months and days of accrued service earned.
Breaks	Displays the amount of breaks in service.
EmplID	Displays the ID of the employee whose service information was processed.

Viewing Service History Information

When you run the Flexible Service Calculation process in *Update to History* mode, the service accrual results are committed to the employee's service history data. You view this information on the Service History page.

The Service History page details the history of service credits for each calendar period, either calculated from the batch process or manually entered.

You can make manual adjustments to history data on this page. However, you can't make adjustments in between creating the temporary file (*Normal Run*) and updating the data to history (*Update to History*). During this time the fields on this page are unavailable.



Manual adjustments entered here will be included in the next *Update to History* process.

Svc History Page

Usage	Use the Svc History (Service History) page to review the history of service credits for each calendar period, either calculated from the batch process or manually entered.
Object Name	EG_SVC_HIST_FLX
Navigation	Administer Workforce, Administer Flexible Service, Use, Service History, Flex Service History
Access Requirements	Enter an employee ID.

The screenshot shows the 'Svc History' page for employee PA013 (Flynt, Mildred). The page displays the following information:

- EmpIID:** PA013, Flynt, Mildred
- Calc Group:** SRVC, Continuous Service
- Service Type:** CONTSRV, Continuous Service

Navigation options include 'View All', 'First', '1-3 of 11', and 'Last'. The main table lists service history periods with the following columns: Begin Date, End Date, Service w/o Breaks, Service Adjusted, Total Service Accrued, and Accum Breaks. Each record includes an 'Action' (HIR), 'Reason Code', 'Adj Rsn', and a 'Notes' field.

Begin Date	End Date	Service w/o Breaks	Service Adjusted	Total Service Accrued	Accum Breaks	Action	Reason Code	Adj Rsn	Notes
01/01/2000	06/30/2000	0.500000	0.000000	5.330000	0.000000	HIR			
07/01/1999	12/31/1999	0.500000	0.000000	4.830000	0.000000	HIR			
01/01/1999	06/30/1999	0.500000	0.000000	4.330000	0.000000	HIR			

Svc History page

The Service History page includes the following fields:

- EmpIID/Calc Group/Service Type** Display-only fields showing employee information.
- Begin Date/End Date** Displays the begin and end dates of the service history calculated for this calendar period.
- Service w/o Breaks** Displays the amount of service accrued without service breaks.
- Service Adjusted** Displays the amount of service adjusted.
- Total Service Accrued** Displays the total amount of service accrued for the employee.
- Accum Breaks** Displays the total amount of breaks in service.

Action	Displays the job Action from the employee's job record, such as LOA (Leave of Absence), that falls within the calendar period.
Reason Code	Displays the Reason Code associated with this job Action that counts toward accrued service. You use the HR Action/Category page to define job Actions and Reasons that count toward service accrual.
Adj Rsn	Use this field to indicate a reason for manual adjustments made on this page. This field is informational only.

You can't update this page following a **Normal Run** of the service accrual process. However, once the service data is committed to history - that is, after you run the process in **Update to History** mode - you can manually adjust the amount fields. The dates remain unavailable.

Ordinarily, you wouldn't change previously earned service credits except to correct an entry mistake. For instance, if you have forgotten to give someone a startup credit for a service type, you could enter the adjustment here.

Viewing Service Detail Information

Use the Service Detail page to view total accrued service credits after running the flexible service calculation process in **Update to History** mode.

Remember that you only see values in the display fields **after** the process has been initially run and service history exists. To view details of the employee's service history, use the Service History page.

You also use this page to establish start-up credits for an employee and record employee exceptions to service accrual.



For more information about viewing service detail information and establishing startup credits and exceptions on the Service Detail page, see [Entering Startup Credits and Exceptions on the Service Detail Page](#).

CHAPTER 4

Tracking Flexible Service Reports

Flexible Service Tracking includes the following reports:

- Employee Service Listing report lists employees by Calculation Group and Service Type.
- Service Calculation report lists the results of the *Normal Run* batch process. This report includes all employees with a temporary file containing details about their accrued service credits.



For more information on generating these reports see Introduction to PeopleSoft Reporting. **For a complete alphabetical listing** of all PeopleSoft HRMS reports see List of Reports in PeopleSoft Human Resources.

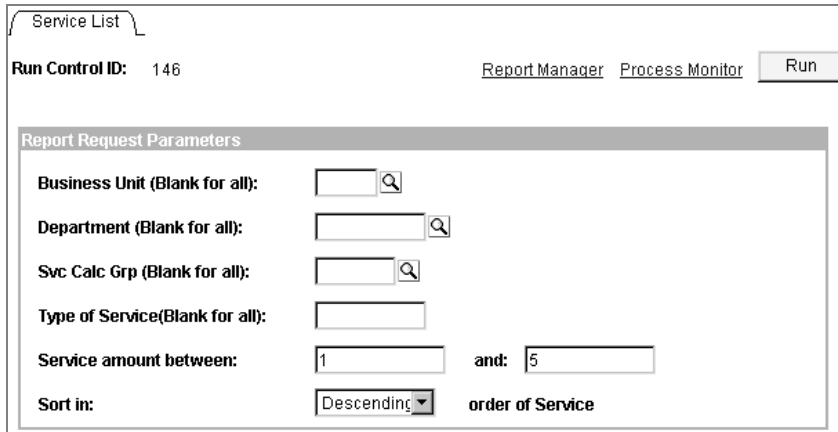
Generating the Employee Service Listing Report

The Empl Service Listing report (PER048) lists employees by service calculation group and service type. This report enables selection by calculation group and service type, with specified periods between *x* and *y* years. It also enables you to **Sort by** ascending or descending service time.

The Empl Service Listing report retrieves information from employment and flexible service records.

Service List Page


Usage	Use the Service List page to run the Employee Service Listing report.
Object Name	RUNCTL_EGPP04
Navigation	Administer Workforce, Administer Flexible Service, Reports, Empl Service Listing, Service List
Prerequisites	None.
Access Requirements	Enter a run control ID.





Service List

Run Control ID: 146 Report Manager Process Monitor Run

Report Request Parameters

Business Unit (Blank for all): 

Department (Blank for all): 

Svc Calc Grp (Blank for all): 

Type of Service(Blank for all):

Service amount between: and:

Sort in: order of Service

Service List page

Run Control ID	Displays the Run Control ID for the report process.
Business Unit (Blank for all)	Select the Business Unit for which you are requesting the report, or leave this field blank to include all Business Units.
Department (Blank for all)	Select the Department for which you are requesting a report, or leave this field blank to include all departments in the report.
Service Calc. Group (Blank for All)	Select the Service Calculation Group for which you are requesting a report, or leave this field blank to include all service calculation groups in the report.
Type of Service (Blank for All)	Select the Service Type for which you are requesting a report, or leave this field blank to include all service types in the report.
Service amount between/and	Enter the range of years of service you want the report to include.
Sort in: order of Service	Specify whether you want the report to list by Ascending or Descending order of Service.

Click **Run** to run this request. Process Scheduler runs the Employee Service Listing process at user-defined intervals.



For more information about Process Scheduler, see Process Scheduler.

Employee Service Listing Report Details

Description	Using this report you can list employees by Calculation Group and Service Type and within specified periods between <i>x</i> and <i>y</i> years. In addition, you can also sort by ascending or descending service time.
Report ID	PER048
Type of Report	SQR
Parameters	Business Unit (or all), Department (or all), Service Calc Group (or all), Type of Service (or all), Service Amount (between <i>x</i> and <i>y</i>), Sort Descending or Sort Ascending (for Service Amount).
Source	RUNCTL_EGPP04
Source Records	Flexible Service Accrual Data, Job Data, Personal Data EG_FLX_SVC_DT, JOB_DATA
Sorted By	Service Calc Group, Type of Service, Department, Service Amount



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation or the PeopleSoft HRMS Reporting Tools.

Generating the Service Calculation Report

The employee Service Calculation Report (PER049) displays employee flexible service credits that have been accrued but not yet committed to their service history. This report displays the results of a **Normal Run** batch process. So you run this report after you have run **Normal Run**.



The results of a **Normal Run** are stored in a temporary file. When you commit service to history (**Update to History**), the temporary file is purged. If you try running the report for the calculation group you've just updated to history, you won't get any output.

Service Calc Report Page

Usage	Use the Service Calc Report page to run the Service Calculation report. Tracking Faculty Events also uses this report.
Navigation	<ul style="list-style-type: none"> • Administer Workforce, Administer Flexible Service, Reports, Service Calc Report, Service Calc Report

	<ul style="list-style-type: none"> • Develop Workforce, Manage Faculty Events, Report, Tenure Calc. Report, Tenure Calc Rpt.
Prerequisites	None
Access Requirements	Enter a Run Control ID.

Service Calc Report page

The Service Calc Report run control page includes the following fields and controls:

Run Control ID Displays the **Run Control ID** for the report process.

Calculation Name Enter the **Calculation Name** (or the Run Control ID) of the batch process you want to run the report for.

Note. If you select the Calculation Name, then you only have to enter the date range you want to run the report for. The other input fields will be unavailable.

Business Unit (Blank for all) Select the **Business Unit** for which you are requesting the report, or leave this field blank to include all Business Units.

Department (Blank for all) Select the **Department** for which you are requesting a report, or leave this field blank to include all departments in the report.

EmplID (Blank for All) Enter an **Employee ID** if you want the report to include a single employee only. Otherwise, leave the field blank for a report including all employees.

Service Calc. Group (Blank for All) Select the **Service Calculation Group** for which you are requesting a report, or leave this field blank to include all service calculation groups in the report.

Show service between (date) Enter the start and end dates of the calendar period you want the report to include. You must enter a month, date and year.

Click **Run** to run this request. Process Scheduler runs the Service Calculation process at user-defined intervals.



For more information about Process Scheduler, see Process Scheduler.

Service Calculation Report Details

Description	This report lists the results of the <i>Normal Run</i> batch process and includes all employees who have a temporary file (resulting from a <i>Normal Run</i>) containing details about their accrued service credits.
Report ID	PER049
Type of Report	SQR
Parameters	There are two ways to run this report: By selecting a Calculation Name (or all). By selecting a Business Unit (or all), Department (or all), EmplID (or all), Service Calc Group (or all). With either approach, you must also specify from/to dates for reporting service credits.
Source	RUNCTL_EGPP05
Source Records	EG_FLX_SVC_DT, JOB_DATA
Sorted By	Service Calc Group, Type of Service, Department, EmplID, Service Interval



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation or the PeopleSoft HRMS Reporting Tools.

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