PeopleSoft 8.00.01 Human Resources PeopleBook

Tracking Faculty Events

PeopleSoft 8.00.01 Human Resources PeopleBook: Tracking Faculty Events

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Tracking Faculty Events

This book provides you with the information you will need for implementing and using the Tracking Faculty Events module of PeopleSoft Human Resources. You can order the online version by requesting SKU HRB8SP1R0, or the hardcopy version by requesting SKU MAHRBr8SP1B 1200.

Faculty Event Tracking is designed to help Higher Education organizations manage your faculty resources. Although Faculty Event Tracking is designed for faculty, it can be used for all staff employees.

Tracking Faculty Events consists of five chapters:

- Tracking Tenure
- Tracking Events
- Reviewing Cases
- Canada Academic Teaching Surveys Business Process
- Running Tracking Faculty Events Reports

CHAPTER 1

Tracking Tenure

The principal criteria for granting tenure are length of service, academic rank, and professional competence. Although most institutions stipulate probationary periods for tenure, the most common being seven years, this varies among colleges and universities. In many institutions, tenure is generally available to those at the rank of assistant professor and above.

With Tracking Faculty Event's tenure tracking feature, you can establish rules and calendars for calculating tenure service based on your organization's specific needs and requirements. The tenure tracking feature enables you to track tenure-related data, define a tenure calendar to match your tenure service clock, and calculate tenure for employees on tenure track. In addition, you can also:

- Identify appointments that are included for service tracking.
- Identify departments capable of granting tenure.
- Monitor employees on tenure track with flexible reporting templates.

Before You Begin

To activate and set up the tenure tracking functionality, you'll need to complete the steps outlined in the following sections:

1. Identifying Tenure Granting Departments
2. Setting Up Service Parameters
3. Setting Up Service Accrual Control Tables
4. Setting Up Tenure Tracking Defaults at the Job Code or Position Level
5. Assigning an Employee to Tenure

Once you've set up Tenure Tracking, you can do the following:

- Process tenure and view the results.
- Report on the case review status.

Identifying Tenure Granting Departments

Before you can use Tenure Tracking, you have to identify the departments that can grant tenure. The Department Table--Comm. Acctg. and EG page has a Tenure Granting flag to identify whether the department can grant or award tenure. You'll select this flag to identify tenure granting departments. On the employee Tenure Data page, the Granting Dept? check box will be selected if the Tenure Granting flag has been selected for this employee's department.

Setting Up Service Parameters

The pages on the Maintain Service Parameters menu enables 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, please refer to 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. Use the setup tables to establish the service rules that best fit your organization. These service rules provide the basis for the tenure 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 following setup tables that you use to establish service accrual rules are shared with the Tracking Flexible Service feature. These tables are documented in E&G Setting Up Service Parameters and Service Accrual Control Tables section of the ***Application Fundamentals for PeopleSoft HRMS PeopleBook***.

- Calendar page

- HR Action/Category page
- Service Rules component
- Calculation Group page

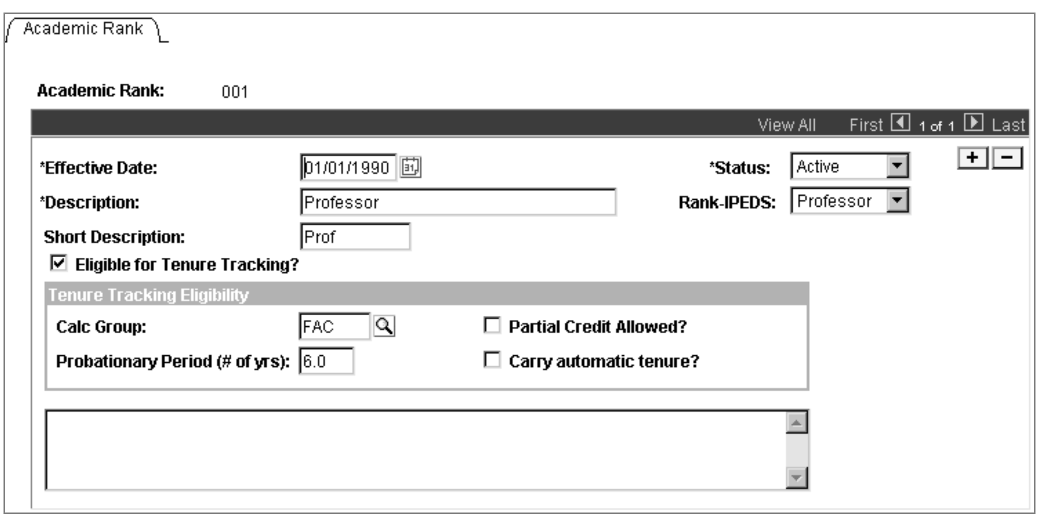
The Academic Rank and Experience Credit Codes pages are unique to Tracking Faculty Events and are documented here. You should complete the above control tables before setting up academic ranks and experience credit codes.

Establishing Academic Ranks

Use the Academic Rank page to establish academic ranks as they apply to your organization. If applicable, you can also define tenure service eligibility information for the academic rank. When you initially assign an academic rank to an employee on the Tenure Data page, the system will default the calculation group and probationary period you establish on the Academic Rank page. In addition, you can define other tenure eligibility data, such as whether the academic rank carries automatic tenure and whether partial service credit is allowed.

Academic Rank Page

Usage	Use the Academic Rank page to establish academic ranks and tenure tracking eligibility for those ranks.
Object Name	EG_RANK_TBL
Navigation	**Develop Workforce, Manage Faculty Events, Setup, Academic Rank, Academic Rank**
Prerequisites	Calculation Group page
Access Requirements	Enter an Academic Rank.



Academic Rank page

The following elements are common to multiple pages and are defined at the front of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date**, **Status**, **Description**, and **Short Description.**

Academic Rank	Displays the **Academic Rank** code you selected.
Rank - IPEDS (Integrated Postsecondary Education Data System-Full Staff Survey)	Select the IPEDS rank, such as ***Professor***. This is used for IPEDS reporting purposes.
Rank - Stats Can (rank, Statistics Canada)	Select a Statistics Canada rank from the list of available options. The data in this field will be reported in the Canada Academic Teaching Surveys. This field is intended for Canadian higher education degree-granting institutions only.
Eligible for Tenure Tracking?	Select the **Eligible for Tenure Tracking?** check box if the academic rank is eligible for tenure tracking. This field doesn't affect tenure service calculation.

Tenure Tracking Eligibility

Calc Group (calculation group)	Select the calculation group for this academic rank. For example, select ***FAC*** to include the Associate Professor rank in the ***FACULTY*** calculation group. Calc Groups are maintained on the Calculation Group page.
Probationary Period (# of yrs)	Enter the number of years this rank is in a probationary period. An employee can have multiple concurrent jobs, but they can accumulate probationary time toward tenure in only one academic rank at a time.
Partial Credit Allowed?	Select the **Partial Credit Allowed?** check box if some credit is applied toward tenure service. This field doesn't affect tenure service calculation.
Carry automatic tenure?	Select the **Carry automatic tenure?** check box if tenure automatically applies to this rank. This field doesn't affect tenure service calculation.

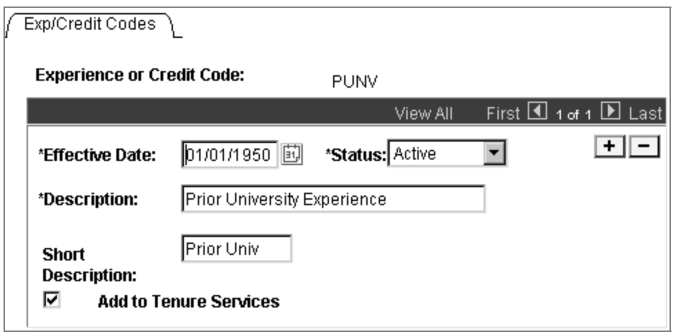
Setting Up Experience/Credit Codes

Use the Exp/Credit Codes page to define the experiences and credits employees earn at other institutions that apply toward tenure in your organization. You can also use this page to set up a credit code for start-up credit to bring forward any accrued service credit in your organization on initial loading of tenure service data.

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

Exp/Credit Codes Page

Usage	Use the Exp/Credit Codes (experience and credit codes) page to define the experiences and credits employees can earn at other institutions that apply toward tenure at your organization.
Object Name	EG_EXP_DFN
Navigation	**Develop Workforce, Manage Faculty Events, Setup, Exp/Credit Codes, Exp/Credit Codes**
Access Requirements	Enter an Experience or Credit Code.



Exp/Credit Codes page

The following elements are common to multiple pages and are defined at the front of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Description**, **Status**, and **Short Description**.

Experience or Credit Code Displays the **Experience or Credit Code**, such as ***PUNIV*** (prior university experience), that you selected in the search page.

Effective Displays the date the experience or credit code is effective.

Add to Tenure Services Select the **Add to Tenure Services** check box if the experience or credit code counts toward tenure service in your organization.

Setting Up Tenure Tracking Defaults at the Job Code or Position Level

Before you assign an employee to a tenure calculation group, you can set up the system to default the academic rank from the job code or position level to the Tenure Data page when you set up employee tenure data. To default an academic rank at the job-code level, select a default **Academic Rank** to be associated with this job code on the Job Code Table - Evaluation Criteria page. To default an academic rank at the position level, select an Academic Rank on the Position Data-Work Location page.

Assigning an Employee to Tenure

Different job actions trigger tenure actions. For example, when an employee is hired, promoted, or transferred from a job, the change from one job action to a different one may continue to count for service or may start a break in the service. When an employee is assigned to tenure, a new tenure record and prior experience/credit records are added into the tenure tracking tables to initiate future processing and information lookups.

In order to calculate tenure service, you must establish which job histories should be processed. To determine relevant jobs and what information automatically defaults when you first set up an employee's tenure data, you need to indicate whether a job will accrue tenure and FTE for the tenure service accrual.

For Tenure Tracking to work, you must turn on tenure accrual for the employee on the Employment Data - Employment Information page. You'll use the Tenure Data page to display and enter information about an employee's tenure status. You enter an employee's previous experience and credits from other institutions on the Prior Experience/Credits page. Entering credits and experience ensures that any start-up credits earned at other institutions are counted toward the employee's tenure accrual. Inquiry pages enable you to view rank and status changes for an employee's tenure history, and to view jobs related to tenure accrual in your organization.

The tenure calculation process accrues service for employees with multiple concurrent jobs. On the Employment Data - Employment Information page, you turn on tenure accrual for each job and indicate the corresponding FTE to prorate the service. The sum of the FTE for all the jobs shouldn't be greater than 1.00.

Turning On Tenure Accrual

Use the Employment Data - Employment Information page to turn on tenure accrual for an employee.

To turn on tenure tracking for an employee:

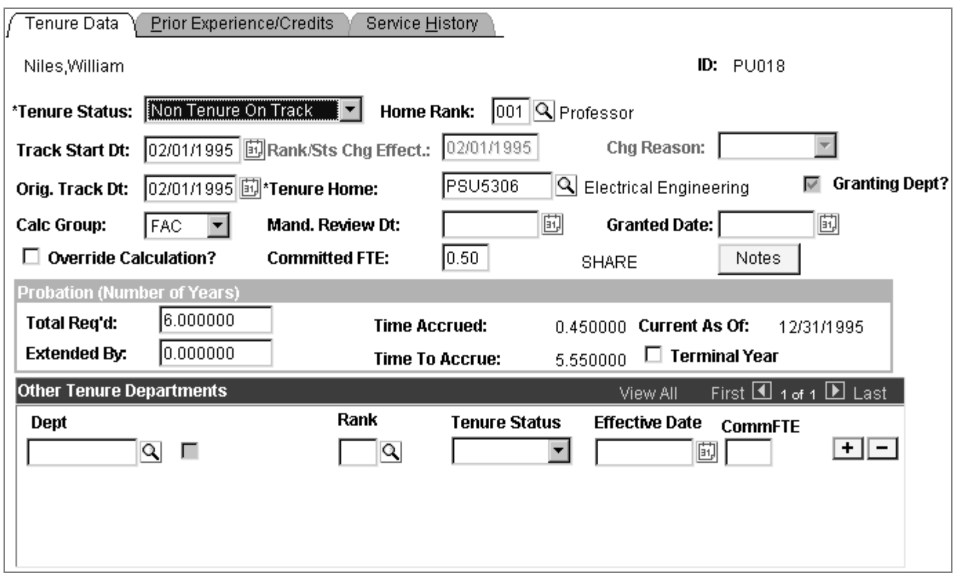
1. Select the Accrue Tenure check box.
2. Enter a value in the FTE for Tenure Accrual field, such as *1.0.*

FTE can't be greater than 1.0. On multiple jobs, the sum of the FTEs of all the jobs selected to accrue tenure can't be greater than 1.0.

Important! Don't use the Calc Group (Flex Service) and FTE for Service Accruals fields on the right side of this page. These fields are for use only if the employee has flexible service calculations run in addition to tenure. If you run only tenure calculations for the employee, these fields must be left blank or errors occur during the tenure calculation process.

Tenure Data Page

Usage	Use the Tenure Data page to maintain tenure tracking data for employees. This page contains all data required to support the tracking of an employee's tenure information. It includes employee-specific information, including each employee's home department for tenure tracking purposes. Much of this information defaults from the Job Data Component.
Object Name	EG_EMPL_TENURE
Navigation	**Develop Workforce, Manage Faculty Events, Use, Tenure Data, Tenure Data**
Prerequisites	You must have set up this employee for tenure accrual on the Employment Data - Employment Information page.
Access Requirements	Enter an employee ID.



Tenure Data page

Tenure Status Select the current Tenure Status for the employee. Available options include:

- ***Non Tenure On Track***
- ***Not Applicable***
- ***Other***
- ***Tenure by de facto***
- ***Tenure Denied***
- ***Tenure***

These values are maintained in the Translate Table.

Note. The tenure accrual program processes only those employees having the tenure status of ***Non Tenure On Track***.

Home Rank	Displays **Home Rank**, which defaults from the Position Data component or the Job Code Table depending on where you set it up. If you didn't set up **Home Rank** on these pages, select the rank of the employee, such as ***005*** (Professor).
Track Start Dt (track start date)	**Track Start Dt** defaults to the Hired Date from the employment record. Make sure you enter the actual date the employee's tenure accrual begins, because tenure is tracked from this date. If an employee has a **Tenure Status** of ***Non Tenure On Track***, then they must have a **Track Start Dt.** The **Track Start Dt** must correspond to the Begin Date of the calendar associated with the **Calculation Group** for the tenure calculation process to run correctly**.** For example, if an employee's **Track Start Dt** is 09/01/1996, then the calendar begin date must be 09/01/1996. For this reason, you might have to define calendars solely for the purpose of accommodating Track Start Dates. Calendars are defined on the Calendar page.
Rank/Sts Chg Effect (rank or status change effect)	This date defaults from the **Track Start Dt** field. If you change the **Home Rank** or the **Tenure Status** fields, the **Rank/Sts Chg Effect** and **Chg Reason** fields will become available for entry to enable you to enter an effective date and the reason for the change for history purpose.
Chg Reason (change reason)	If this field doesn't default, then select the reason for the change. Options include:

- ***None***
- ***Correction***
- ***Mid Period***
- ***New***
- ***Other***
- ***Pending***
- ***Recalc***
- ***Retro Adj***

Orig. Track Dt (original track date)	This date is the same as the **Track Start Dt** initially but can be overridden. Enter the date from which tenure tracking begins for the employee, if necessary
Tenure Home	Displays the department granting the employee's tenure. This field defaults from the employee's current Job record.
Granting Dept?	This display-only check box is selected if the Tenure Home that displays is the department granting the tenure status.
Calc Group (calculation group)	Select the group used to calculate tenure accrual. You define the **Calc Group** on the Academic Rank Table.
Mand. Review Dt. (mandatory review date)	Enter the mandatory review date for the employee.
Granted Date	Enter the date tenure was granted, if appropriate.
Override Calculation?	Select the **Override Calculation?** check box if you don't want this employee to be included in the batch tenure calculation process.
Committed FTE	Enter the **Committed FTE** for this employee. The purpose of this field is to enable you to track the tenure FTE committed for budgetary reasons. The Tenure FTE field on the Employment Data - Employment Information page determines the proration for the accrual process.

Note. Other tenure departments' information isn't used in batch service calculation.

Notes	Click the **Notes** button to document notes regarding the employee's tenure.

Probation (Number of Years)

The **Probation (Number of Years)** group box of this page contains probation information for tenure accrual.

Total Req'd (total required)	Displays the total number of probationary years required before granting tenured status. The total defaults from the Academic Rank Table but can be overridden.
Extended By	Enter the number of years by which the probationary period is extended for this employee, if appropriate.
Time Accrued	Displays the number of accrued probationary years. This amount is posted to the Service History page.
Time To Accrue	Displays the remaining probationary years the employee needs to accrue. This figure is calculated by the system.
Current As Of	Displays the end date of the last processed computational period.
Terminal Year	Select the **Terminal Year** check box when the employee is in the last year of reaching the total number of required probationary years. For example, if the **Total Req'd** probationary years is ***8***, then you may select the **Terminal Year** check box if **Time To Accrue** equals 1 year. The **Time Accrued** and **Time To Accrue** fields display ***0*** years when you select this check box.

Other Tenure Departments

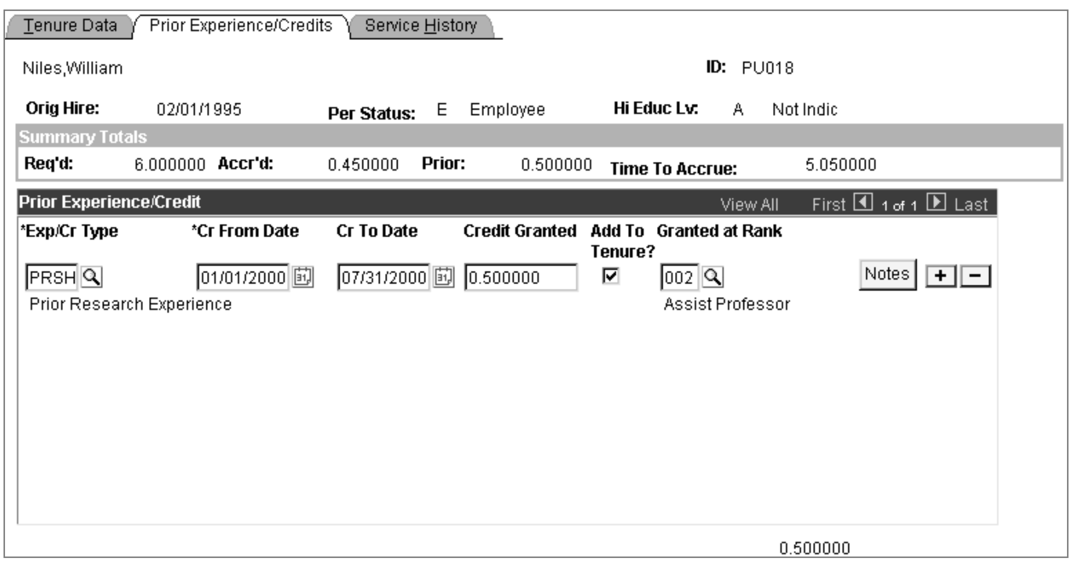
The **Other Tenure Departments** group box of the Tenure Data page enables you to maintain tenure-related information for an employee in departments other than the home department. The data in this section doesn't default from the employee's Job record and isn't used in the service calculation process. It is strictly for informational purposes only.

Dept (department)	Enter other departments in which the employee is accruing tenure. For example, an employee may hold positions in two departments. **Note.** If the check box next to **Dept.** is selected, it indicates the department is a tenure-granting department.
Rank	Enter the **Rank** the employee holds in that department. The **Rank** options are maintained on the Academic Rank table.
Tenure Status	Enter the employee's **Tenure Status** for the position.

Effect Dt (effective date)	Enter the date the tenure status is effective.
CommFTE (committed full time equivalent)	Enter the percentage of time the employee is a committed FTE.

Prior Experience/Credits Page

Usage	Use the Prior Experience/Credits page to track an employee's accrued service from other institutions that counts toward your organization's tenure service clock. Experiences that count toward tenure are recorded and are added into the total probationary period. The experiences and credits that display on this page are maintained on the Exp/Credit Codes page.
Object Name	EG_PRIOR_EXP
Navigation	**Develop Workforce, Manage Faculty Events, Use, Tenure Data, Prior Experience/Credits**
Prerequisites	Tenure Data page.
Access Requirements	Enter an employee ID.



Prior Experience/Credits page

The top sections of this page display the employee's name, employee ID, and the following information:

Orig Hire (original hire)	Displays the date the employee was hired.
Per Status	Displays the employee's status, such as ***Employee*** or ***Contractor***.

Hi Educ Lv (highest education level)	Displays the employee's highest level of education.

Summary Totals

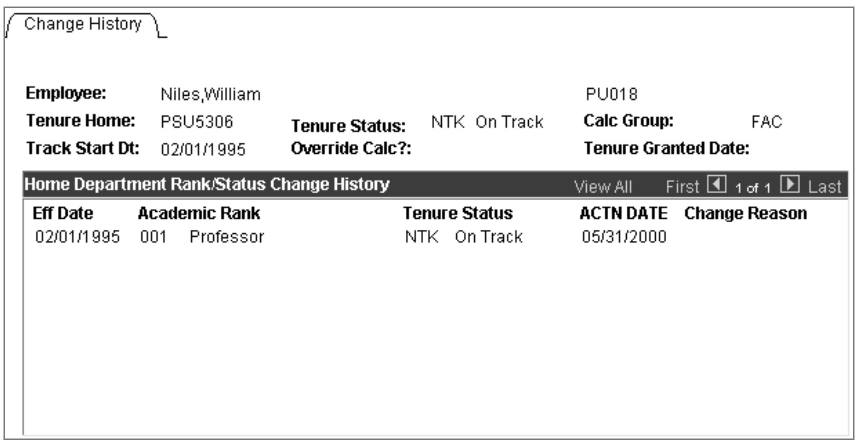
Req'd (required)	Displays the total number of service years required to receive tenure. This information defaults from the Total Req'd field on the Tenure Data page.
Accr'd (accrued)	Displays the total number of service years accrued toward tenure. This information defaults from the Time Accrued field on the Tenure Data page. The number will change if an online adjustment is made to service history.
Prior	Displays the number of years acquired from prior employment that count toward tenure service. The unit is in number of years calculated to two decimal places. This information is maintained on the Exp/Credits page.
Time To Accrue	Displays the number of years remaining to accrue tenure status. This information defaults from the Time To Accrue field on the Tenure Data page. The number of years remaining to accrue tenure status will adjust if online adjustment is made to service history.

Prior Experience/Credit

Exp/Cr Type (experience/credit type)	Select the employee's previous experience or credit type, such as ***RSHR*** (research).
Cr From Date (credit from date)	Enter the beginning date of the experience or credit.
Cr To Date (credit to date)	Enter the ending date of the experience or credit.
Credit Granted	Enter the amount of credit granted for the prior experience.
Add To Tenure?	Select the **Add To Tenure?** check box to add these credits to tenure accrual.
Granted at Rank	Select the rank at which the credits were granted, such as ***005*** (professor).
Notes	Click the **Notes** button to add comments to the employee record regarding prior experience.

Change History Page

Usage	Use the Change History page to view information about changes made to academic rank and tenure status associated with a home department. The system automatically tracks changes made to academic rank and tenure status associated with a home department. The Change History page is a display-only page.
Object Name	EG_TENURE_CHG
Navigation	**Develop Workforce, Manage Faculty Events, Inquire, Rank/Status Change History, Change History**
Prerequisites	You must have set up this employee for tenure accrual on the Employment Data - Employment Information page.
Access Requirements	Enter an employee ID.



Change History page

The following element is common to multiple pages and is defined at the front of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Eff Date**.

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 ***FAC*** (faculty).

Track Start Dt (track start date) — Displays the date tenure tracking began for the employee.

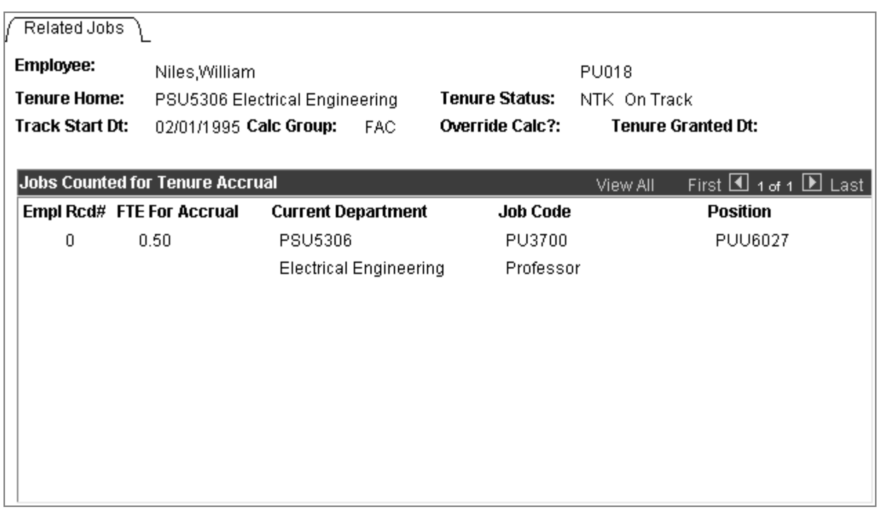
Override Calc? (override calculation?)	Displays only if the **Override Calc?** check box is selected on the Tenure Data page.
Tenure Granted Date	Displays the date tenure was granted, if the employee received tenure status.

Home Department Rank/Status Change History

Academic Rank	Displays the employee's academic rank at the time the rank/status change became effective.
Tenure Status	Displays the employee's tenure status at the time of the rank/status change.
Action Dt (action date)	Displays the date the rank/status change takes place.
Change Reason	Displays the reason for the rank/status change.

Related Jobs Page

Usage	Use the Related Jobs page to review current job(s) that count toward an employee's tenure. This is a display-only page.
Object Name	EG_JOB_VW
Navigation	**Develop Workforce, Manage Faculty Events, Inquire, Related Jobs for Tenure, Related Jobs**
Prerequisites	You must have set up this employee for tenure accrual on the Employment Data - Employment Information page.
Access Requirements	Enter an employee ID.



Related Jobs page

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 (tenure 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 ***FAC*** (faculty).
Override Calc? (override calculation?)	Displays only if the **Override Calc?** check box is selected on the Tenure Data page.
Tenure Granted Dt (tenure granted date)	Enter the date the employee received tenure status.

Jobs Counted for Tenure Accrual

Empl Rcd# (employee record number)	Displays the employee's record number, maintained in the Job Data pages.
FTE For Accrual (full time equivalent for accrual)	Displays the employee's full time equivalent value, such as ***.80*** for an employee working 80 percent of normal full time schedule. The **FTE for Accrual** is maintained on the Employment Data - Employment Information page.
Current Department	Displays the employee’s current department.
Job Code	Displays the employee's job code. Job Code IDs are maintained on the Job Code Table.
Position	Displays the employee's position number and a description of the position.

Processing Tenure and Viewing the Results

Once you've set up your service parameters and tenure control tables, assigned employees to tenure service, and set up the employee's tenure data and any prior experience/service credits, you're ready to run the tenure calculation process (Tenure Calc).

Tenure calculation is a two-step process. First, calculate tenure service in ***Normal Run*** mode for a specific time period or periods, such as a semester or quarter. You can calculate tenure service for a specified calculation group or an individual employee. The results display on the Tenure Run Results page, but these are temporary until you run ***Update to History*** mode in the next step.

Second, use ***Update to History*** mode to update tenure and service history with the results of the calculation run in ***Normal Run*** mode. Running ***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. You can view the results of the update on the Service History page.

After you calculate tenure, view messages about the batch processing on the Message Log page. Viewing messages enables you to make sure that tenure calculations are running correctly before you commit them to history by running the ***Update to History*** mode. When tenure calculation is complete, you can view the results on the Inquiry pages and then print tenure reports.

For more information on Tenure Service reports, see Running Tracking Faculty Events Reports.

You'll want to run the tenure calculation on a periodic basis (for example, at the end of the academic year-to calculate accrued tenure for employees). You can run the tenure calculation process as many times as you like.

Running the Tenure Calculation Process

Use the Tenure Calc page to run tenure calculations for a specific tenure calculation group or an individual employee. You also use this page to update tenure history. Tenure calculation is a two-step process. First, you'll calculate tenure service in ***Normal Run*** mode for a specific time period(s), such as a semester or quarter. Second, you'll use the ***Update to History*** mode to update tenure and service history with the results of the calculation run in ***Normal Run*** mode. There's a third processing option, ***Delete_Rebuild History***.

Follow these recommendations to run the tenure calculation process:

- Run ***Normal Run*** mode before you run ***Update to History***.
- If you process an individual employee, we recommend that you do only the ***Normal Run*** for that employee; then, do the ***Update to History*** for all the employees within a tenure calculation group at the same time.
- When you use ***Delete_Rebuild History*** mode, none of the adjustments that you have entered on the Service History page re-accrue. You will have to re-enter the adjustments. All start-up credits recalculate.
- Use the same Run Control ID that you use in ***Normal Run*** mode for the ***Update to History*** run for processing the same computation periods.

If you have a temporary file for an employee and you use the same run control but change the end date for the ***Update to History*** run, the system will still update the contents of the temporary file.

How the System Calculates Tenure Service

When you calculate tenure service, the system does the following:

- Determines an employee's eligibility by checking the tenure status on the Tenure Data record. The batch process only processes employees with tenure status of *Non Tenure On Track.*

- Calculates service based on the From Date and To Date, which constitute the computational period specified on the run control page.

The only time the system *doesn't* calculate service based on the From Date and To Date is the first time the employee goes through the calculation process. Since the employee has no service history, the system uses the employee Track Start Date as the From Date for the starting point in determining tenure service.

- Looks at 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. The calculation group is defined in the employee's tenure data record. The setup tables as shown in Setting Up Service Accrual Control Tables are also used in the process.
- When the calculation process is finished, performs any prorating by FTE on the calculated service before writing the service details to a temporary service history file. Prorating by FTE (on the calculated service) only occurs if it is specified in the Service Rules page. Service details are written by the computational period set up on the Calendar page.
- Reviews the Action/Category codes of each employee in the calculation group to determine if they were in an eligible status during a specific time period as defined on the Calendar. If the employee is eligible the whole period, the employee is granted the amount of credit indicated on the Calendar.
- If the employee is in an eligible status for all (or part) of the period, the system grants partial or prorated credit.

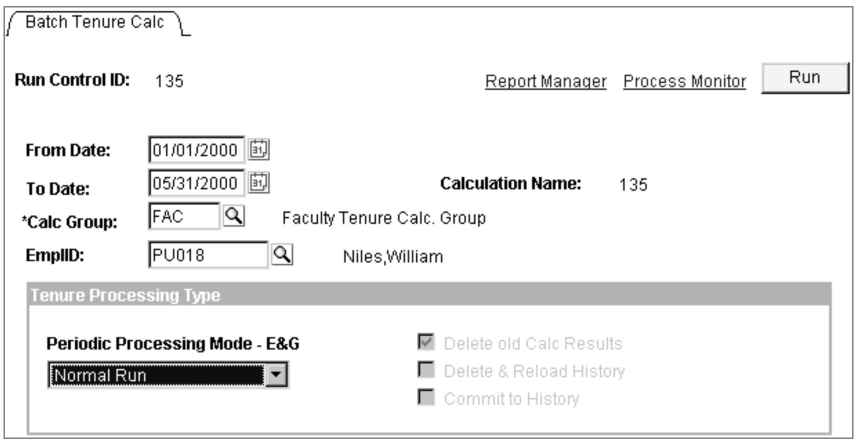
How the System Updates Tenure and Service History

When you update tenure service and service history, the system does the following:

- Processes each employee by selecting their service details from the temporary service history file.
- Updates the employee tenure data record as follows:
  - 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 Total Req'd.
  - 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.

Batch Tenure Calc Page

Usage	Use the Batch Tenure Calc (tenure calculation process) page to run tenure calculations for a specific tenure calculation group or an individual employee. You also use this page to update tenure history.
Object Name	RUNCTL_EGPP01
Navigation	**Develop Workforce, Manage Faculty Events, Process, Tenure Calc Process, Batch Tenure Calc**
Prerequisites	You must have set up calculation groups on the Calculation Group page.
Access Requirements	Enter a Run Control ID.



Batch Tenure Calc (tenure calculation process) page

The following element is common to multiple pages and is defined at the front of this PeopleBook in PeopleBooks Standard Page Element Definitions: **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.

Calculation Name

Displays the **Run Control ID** that you entered earlier.

Calc Group (calculation group)

Select the calculation group, such as ***FAC1*** (faculty) for which you want to run tenure service totals. The **Calc Group** processes all employees within that group for the specified dates unless you specify a specific **EmplID.**

Note. If you process an individual, you still have to select a **Calc Group.**

EmplID (employee ID)

Select the **EmplID** only if you want to process tenure for an individual employee; otherwise, leave this field blank.

Tenure 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 because 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 Tenure Calculation Summary page. The calculation is purged once you run the process in ***Update to History*** mode.

Update to History

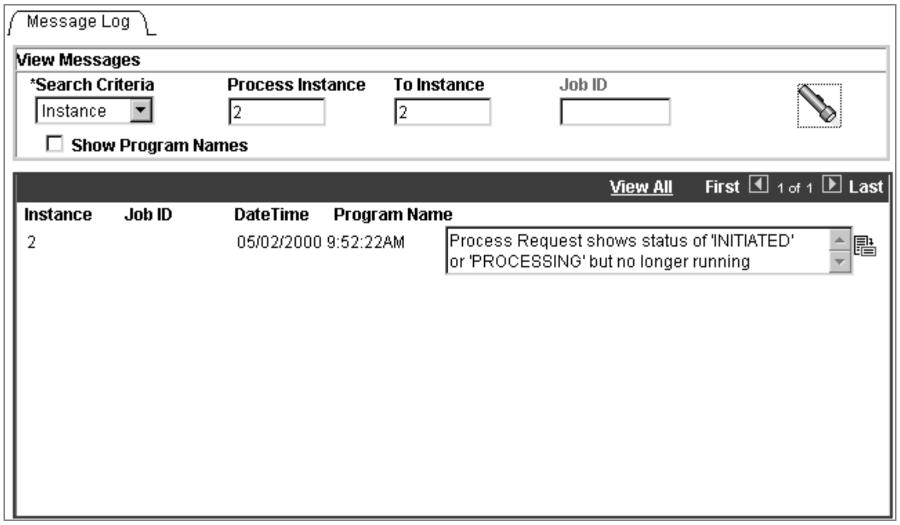
This mode updates the tenure service totals on the employee tenure data record and adds the new service details to the employee Service History page. The input data for an ***Update to History*** run is the results of the ***Normal Run***. When you select this option, the system will select the **Commit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

Message Log Page

Usage	Use the Message Log page to view dated and timed information about batch processes. This page tracks errors in processes and searches for error messages associated with a particular run. Administer Flexible Service also uses this page.
Object Name	EG_MESSAGE_LOG
Navigation	• **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 the Tenure Calculation Process.
Access Requirements	None



Message Log page

View Messages

Search Criteria

Select the options for the focus of the inquiry. Options are:

- ***Instance***
- ***Job ID***
- ***Both***

The search criteria fields to the right display differently depending on the **Search Criteria** option you select.

Process Instance and **To Instance**

If you select ***Instance*** or ***Both*** for the **Search Criteria**, then enter the **Process Instance** field. As soon as you enter **Process Instance**, the **To Instance** defaults to the same number.

If you want to include more than one batch process instance, enter the number of the last instance or process for which you want information.

Job ID

If you select **Job ID** as the ***Search Criteria***, then enter the ID number in the **Job ID** field.

Show Program Names

Select the **Show Program Names** check box to display program names in the message information. This enables you to view the name of the specific program that generated the error message.

Click the **Search** button to display the Message Log.

Instance/Job ID Displays the **Instance** or **JobID** number for each message.

DateTime/Program Name Displays the date and time the program was run. If you selected the **Show Program Names** check box, the program message displays in the text box.

Click this to launch the error message box, which displays detailed information about the error message.

Periodic Process Page

Usage	Use the Periodic Process page to view the output results of the tenure calculation process run. Use this page to view information on employee's tenure status, to verify what was processed, and to determine if the run was successful or not. The information on the Periodic Process page is temporary and changes when you run the Tenure Clac Process in the ***Update to History*** mode with the same **Run Control ID** and calculation group. Administer Flexible Service also uses this page.
Object Name	EG_PRDIC_RSLTS
Navigation	• **Administer Workforce, Administer Flexible Service, Inquire, Periodic Results, Periodic Process** • **Develop Workforce, Manage Faculty Events, Inquire, Tenure Run Results, Periodic Process**
Prerequisites	The Tenure Calculation process.
Access Requirements	Enter a Run Control ID.

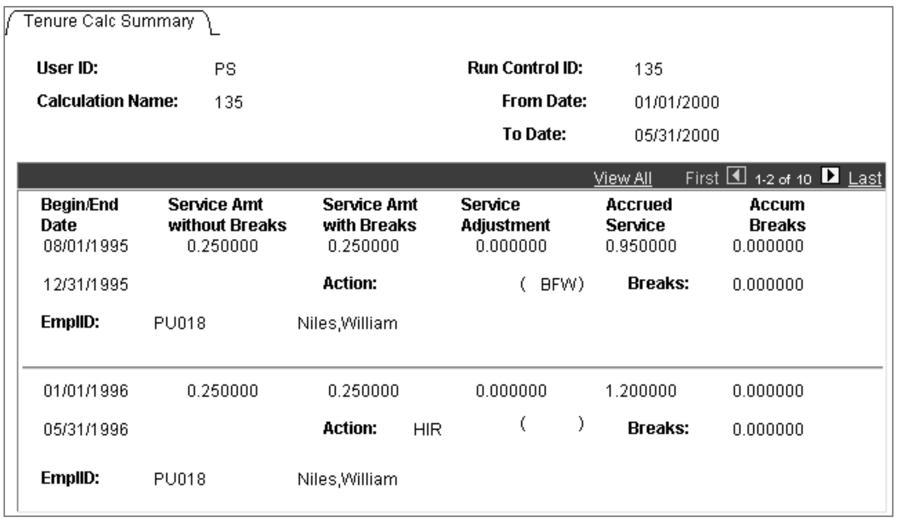
Periodic Process page

Run Control ID	Displays the **Run Control ID** you assigned to this process.
Process Instance	Displays the number of this process instance.
Run Date	Displays the date the calculation process was run.
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 process run.
Periodic Cycle	Displays the **Periodic Cycle** you established for this **Run Control ID**. For instance, you can set a calculation process to run every Semester, every Quarter or every Year.
Process Mode	Displays the processing mode you selected on the Batch Tenure Calc page for this calculation.
Service Calculation Group	Displays the calculation group included in this process run.
ID	If you are running the calculation for an individual employee, this field displays the employee's **ID** number.
Calculate All Groups	This field displays ***N*** (No).
Delete & Reload History **Delete Old Calc Results** **Commit to History**	Each of these fields displays ***Y*** (Yes) or ***N*** (No), depending on the processing mode you chose for this calculation.
Calc Group (calculation group)	Displays the calculation group selected for this run.
Service Type	Displays the **Service Type** you selected for inclusion 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 flagged during the calculation process as erroneous.

Tenure Calc Summary Page

Usage	Use the Tenure Calc Summary page to review the results of the tenure accrual for the calculation runs ***Normal Run*** or ***Delete_Rebuild History*** on the Tenure Calc Process, Batch Tenure Calc page. This data hasn't

	yet been updated to the employee tenure history. It resides in a temporary area until the final update process is run. Once ***Update to History*** is run on the Tenure Calc Process, Batch Tenure Calc page, the data is deleted from the temporary file and isn't viewable from the Tenure Calculation Summary page.
Object Name	EG_CLC_SVC_SUM
Navigation	**Develop Workforce, Manage Faculty Events, Inquire, Tenure Calc Summary, Tenure Calc Summary**
Prerequisites	The Tenure Calculation process.
Access Requirements	Enter a Run Control ID.



Tenure Calc Summary page

The Tenure Calc Summary page is a display-only page.

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

Calculation Name Displays the name of the requested calculation. The **Calculation Name** is the same as the **Run Control ID.**

From Date Displays the date from which the batch tenure calculation process was run.

To Date Displays the date to which the batch tenure calculation process was run.

As of Date: Displays the date the batch calculation process was run.

Begin/End Date Displays the **Begin** and **End Dates** for this calculation process run.

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.
Service Adjustment	This field isn't currently used.
Accrued Service	Displays the total amount of accrued service time.
Accum Breaks (accumulated breaks)	Displays the total amount of accumulated breaks in service.

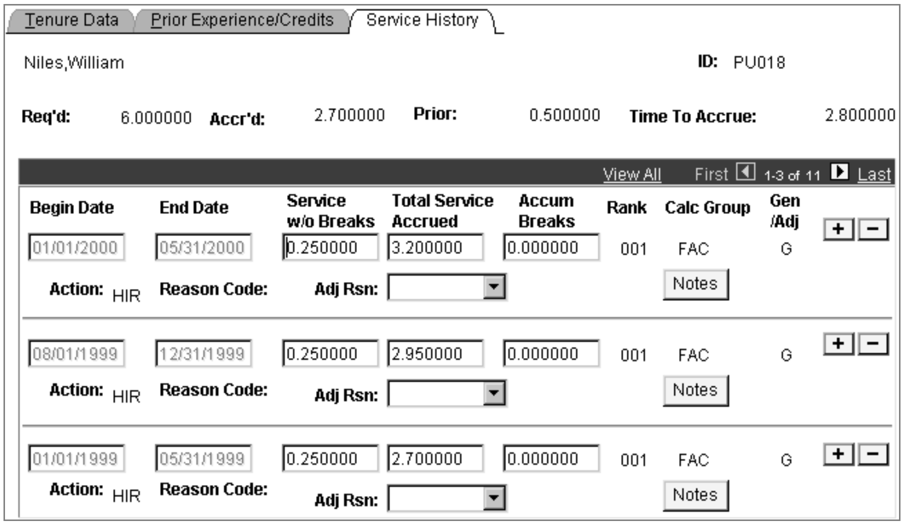
Note. If the employee has existing service history, the total service amount will be brought forward in an entry with an Action of ***BFW***. Begin/End dates for the entry will show the date of the day prior to the **From Date** of the period you specified on the Tenure Calc Process page.

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.

Tenure Data – Service History Page

Usage	When you run the tenure calculation process on the Batch Tenure Calc page in ***Update to History*** mode, the calculation results are permanently added to the database. These permanent results reside on the Service History page. This page details the history of tenure time calculated or adjusted, displaying the history by computational period. **Note.** Any adjustments you enter here in *Correction* mode will be included in the next ***Update to History*** process. The adjustments made on this page will automatically update the totals on the employee Tenure Data page.
Object Name	EG_SVC_HIST
Navigation	**Develop Workforce, Manage Faculty Events, Use, Tenure Data, Service History**
Prerequisites	The Batch Tenure Calculation process.

Access Requirements	Enter an employee ID.



Tenure Data - Service History page

Req'd (required)	Displays the Total Req'd from the Tenure Data page.
Accr'd (accrued)	Displays the number of years accrued toward tenure.
Prior	Displays tenure credits for prior experience. This field defaults from the Prior Experience and Credits page.
Time to Accrue	Displays the remaining number of years before tenure is granted.
Begin Date and End Date	Displays the begin and end dates of the tenure calculated in this run process. You can't change the begin date and end date if the service history for the period already exists.
Process Date	Displays the end date of the cycle.
Service w/o Breaks (service without breaks)	The percent of FTE accrued without service breaks.
Total Service Accrued	The total percentage of services accrued. This field increases incrementally when the calculation process is run.
Accum Breaks	Displays the job Action, such as ***LOA*** (leave of absence), falling within the requested period.
Ranks	Displays the rank for the calculation group.
Calc Group (calculation group)	Displays the name of the calculation group, such as ***FAC*** (faculty).

Gen/Adj (generated/adjustment)	If the batch calculation process creates the line, this field will show ***G*** (generated). If it's entered online, the field will show ***A*** (adjustment).
Action	Displays the job **Action**, such as ***LOA*** (leave of absence), falling within the requested period.
Reason Code	Displays the **Reason Code** associated with this **Action** that makes it count toward accrued tenure. You use the HR Action/Category page to define job actions and reasons that count toward tenure accrual.
Adj Rsn (adjustment reason)	Select an adjustment reason –(the reason tenure is added to the total tenure accrued). You use this field to adjust tenure accrual history records. You can add a row to reflect an adjustment, or you can adjust an existing row. You can also modify a record generated by the system. However, running *Delete & Rebuild History* from the Batch Tenure Calc page purges the record.
Notes	Click the Notes button to display notes regarding this employee's tenure history.

Viewing Updated Tenure Data

When you update tenure and service history, the system updates the information on the Tenure Data page where you can view it.

For more information about the Tenure Data page, see Tenure Data Page.

CHAPTER 2

Tracking Events

The events tracking feature enables you to track and maintain data on faculty events. This data can be used to assist in tenure decisions. You can track specific information including:

- Activities (including research activities)
- Administrative posts
- Education
- Honors and awards
- Licenses and certificates
- Memberships
- Presentations
- Publications
- Significant special projects
- Student advisement
- Teaching responsibilities
- Committee information

Each page is keyed off the employee ID, employee name, and/or department. Some table set up is required to support these pages. The tables are discussed in each section.

In addition, we deliver a Faculty Events History report that provides a hard copy of all the Event information on file for the faculty member (Curriculum Vitae data).

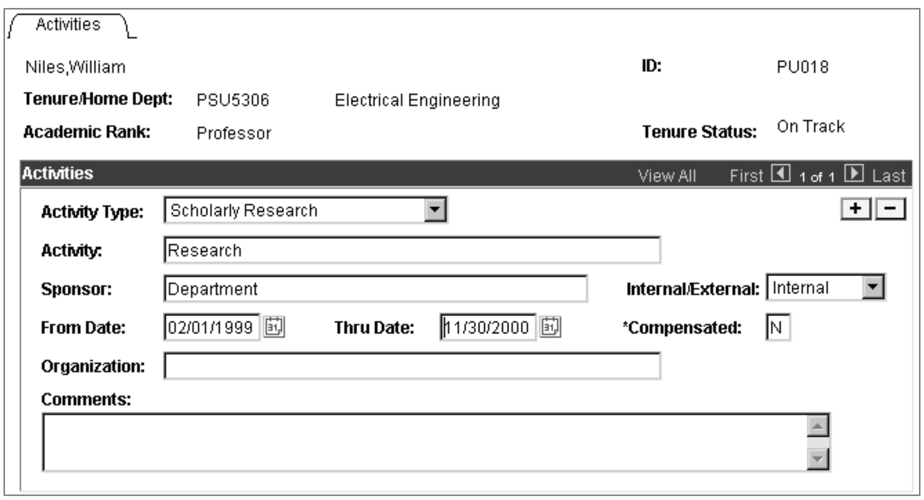
For more information on Event Tracking reports, see Running Tracking Faculty Events Reports.

Tracking Employee Activities

Use the Activities page to track an employee's research activities. We deliver the system with two research types, ***Original*** and ***Scholarly***. You can add your own types using the Translate Table.

Activities Page

Usage	Use the Activities page to track an employee's research activities.
Object Name	EG_ACTIVITIES
Navigation	**Develop Workforce, Manage Faculty Events, Use, Activities, Activities**
Access Requirements	Enter an Employee ID.



Activities page

The top section of this page displays the employee's name, **ID, Tenure/Home Depart, Academic Rank,** and **Tenure Status.**

Activity Type — Select the type of research activity, such as ***Original***, or ***Scholarly***, from the list of available options.

Activity — Enter a description of the activity.

Sponsor — Enter the sponsor's name.

Internal/External — Select whether the project was ***Internal (I)*** (took place within the organization) or ***External (E)*** (took place outside the organization).

From Date — Enter the beginning date of the activity.

Thru Date Enter the date the activity ends.

Compensated Enter ***Y*** if the employee was compensated for the activity.

Enter ***N*** if the employee wasn't compensated for the activity.

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

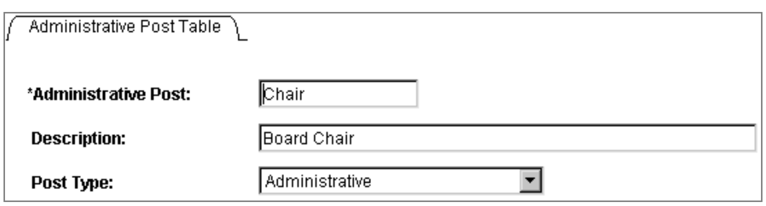
Comments Enter any comments about the activity.

Tracking Administrative Posts

Use the Administrative Posts page to track an employee's administrative posts. You can also use this page to track faculty appointments and titles that you don't want to track on the Job Data pages. Before you can track administrative posts you'll need to define administrative posts on the Administrative Post Table.

Administrative Post Table Page

Usage	Use the Administrative Post Table page to set up administrative posts for faculty and staff.
Object Name	EG_ADMIN_POST_TBL
Navigation	**Develop Workforce, Manage Faculty Events, Setup, Administrative Posts, Administrative Post Table**
Access Requirements	Enter an Administrative Post.



Administrative Post Table page

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

Description Enter a description of the post, appointment, or title.

Post Type Select the **Post Type**. PeopleSoft delivers the system with the following three types of posts:

- ***Academic Responsibility***
- ***Administrative***
- ***Title***

You can add your own types of posts using the Translate Table.

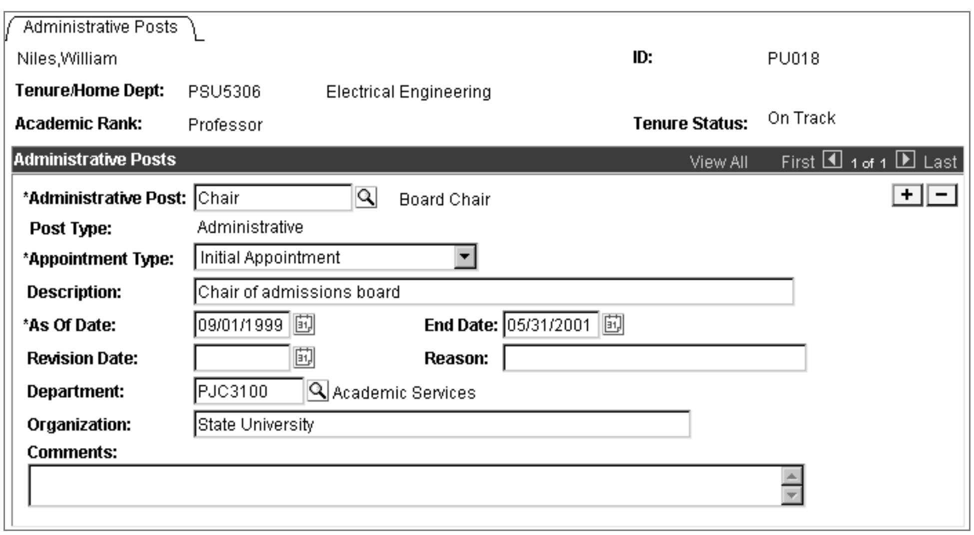
Stats Can Responsibility (Statistics Canada Responsibility)

Select a **Stats Can Responsibility** code from the list of available options. The data in this field will be used in the Canada Academic Teaching Surveys.

This field is intended for Canadian higher education degree granting institutions only.

Administrative Posts Page

Usage	Use the Administrative Posts page to track an employee's administrative posts. You can also use this page to track faculty appointments and titles you don't want to track on the Job Data pages.
Object Name	EG_ADMIN_POSTS
Navigation	**Develop Workforce, Manage Faculty Events, Use, Administrative Posts, Administrative Posts**
Access Requirements	Enter an Employee ID.


Administrative Posts
Niles,William ID: PU018
Tenure/Home Dept: PSU5306 Electrical Engineering
Academic Rank: Professor Tenure Status: On Track
Administrative Posts View All First 1 of 1 Last
*Administrative Post: Chair Board Chair
Post Type: Administrative
*Appointment Type: Initial Appointment
Description: Chair of admissions board
*As Of Date: 09/01/1999 End Date: 05/31/2001
Revision Date: Reason:
Department: PJC3100 Academic Services
Organization: State University
Comments:

Administrative Posts page

The top section of this page displays the employee's name, **ID, Tenure/Home Depart, Academic Rank,** and **Tenure Status.**

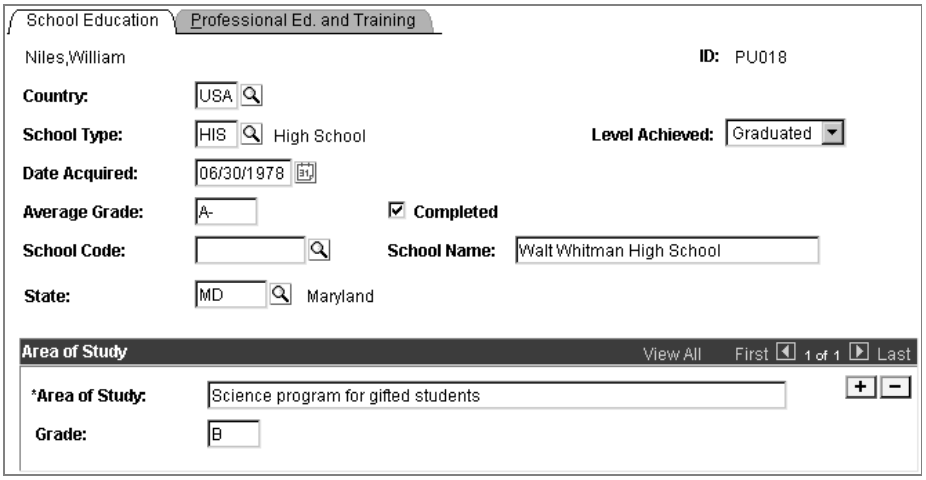
Administrative Post	Select the employee's administrative post from the entries you've established in the Administrative Post Table.
Post Type	The value that displays here depends upon your selection in the **Administrative Post** field.
Description	Enter a description of the post, title, or appointment.
As Of Date	Enter the date the post, title, or appointment begins
End Date	Enter the date the post, title, or appointment ends.
Revised Date	If the end date changes, enter the revised end date.
Reason	Enter the reason the end date changed.
Department	Select the department in which the post is held.
Organization	Enter the organization (internal or external) in which the post was held, if applicable.
Comments	Enter comments regarding the post. You might use this field to record the responsibilities associated with the post, title, or appointment.

Tracking Employee Education

Use the Education page group to record information about an employee's educational background and to track an employee's professional education and training.

Education - School Education Page

Usage	Use the School Education page to maintain information about an employee's educational background. This information is helpful for producing complete employee profiles, and to determine employee abilities for career and tenure planning purposes.
Object Name	EG_SCHOOL_EDUCAT
Navigation	**Develop Workforce, Manage Faculty Events, Use, Education, School Education**
Access Requirements	Enter an Employee ID.



Education - School Education page

School Type	Select the **School Type,** such as ***High Schl*** (high school) from the list of available options. You can add additional **School Type(s)** on the Translate Table.
Date Acquired	Enter the date when the level of education was achieved.
Average Grade	Enter an average grade using letters or numbers, for example, ***3.8***.
School Code	Select a **School Code.** Valid **School Code** values are maintained in the School Table. If no code exists, enter the **School** name. When you **TAB** out of this field, the system automatically completes the **School** name, **State,** and **Country.** **School Codes** are maintained on the School Table.
Level Achieved	Select the level of education achieved, such as ***Graduated*** or ***Degree*** from the list of available options. You can add additional education levels on the Translate Table.
Completed	If this program has been completed, select the **Completed** check box.
School Name, Country, and **State**	Enter **School Name, Country,** and **State** if the system doesn't default them from the School Table.

Area of Study

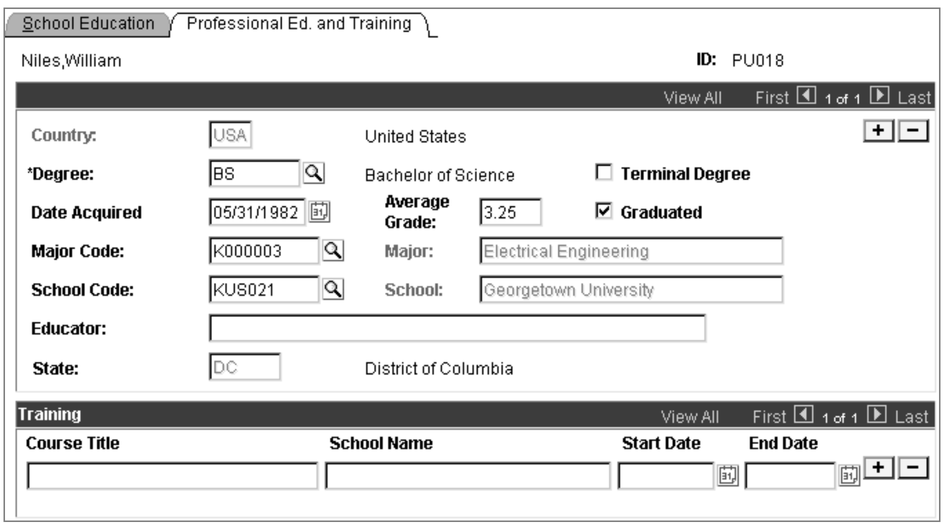
Use the **Area of Study** section of the page to enter information on the employee's area of study and their grade point average.

Area of Study	Enter the major **Area of Study** for this employee.

Grade Enter an average grade for the area of study using letters or numbers. For example, enter ***4.0***.

Education - Professional Ed. and Training Page

Usage	Use the Professional Ed. and Training page to track an employee's professional education and training.
Object Name	EG_EDUCAT_TRAIN_GB
Navigation	**Develop Workforce, Manage Faculty Events, Use, Education, Professional Ed. and Training**
Access Requirements	Enter an Employee ID.



Education - Professional Ed. and Training page

Degree Select the **Degree** this employee has earned from the list of available options. You can add additional degrees on the Degree Table.

Terminal Degree Select the **Terminal Degree** check box if this degree is the final degree earned by the employee.

Date Acquired Enter the date the degree was acquired.

Average Grade Enter an average grade for the area of study using letters or numbers. For example, enter ***3.9***.

Graduated Select the **Graduated** check box for this employee if they have graduated.

Major Code and **Major**	Select a **Major Code** from the list of available options. You can add additional valid values on the Major Table. When you select a **Major Code,** the system automatically displays the corresponding **Major** and makes this unavailable for entry. To enter a major that doesn't have a code, leave **Major Code** blank and enter a description in **Major.**
School Code and **School**	Select a **School Code** from the list of available options. You can add additional valid values on the School Table. Enter a **School Code** or, if no code exists, enter the **School** name. When you **TAB** out of this field, the system automatically displays the **School** name **State,** and **Country.**
Educator	If appropriate, enter additional information about the educator, such as organization (other than school), or instructor's name.
Country and **State**	When you **TAB** out of the **School Code** field, the system automatically displays the **Country** and **State.** If you select another **Country** code after you've already selected a **State** code, the system clears the value in the **State** field.

Training

Use the **Training** section of the page to enter specific courses the employee has taken.

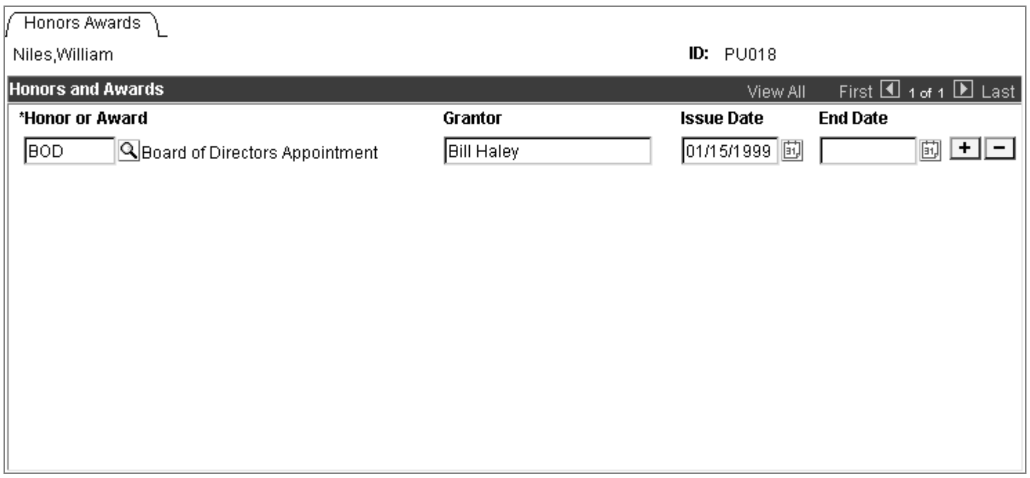
Course Title	Enter the name of the course.
School Name	Enter the name of the school in which training was completed.
Start Date	Select the date the course started
End Date	Select the date the course was completed

Tracking Honors and Awards

Use the Honors and Awards page to enter honors and awards an employee has received throughout their career.

Honors Awards Page

Usage	Use the Honors Awards page to enter honors and awards an employee has received throughout their career.
Object Name	EG_HONORS_AWARDS
Navigation	**Develop Workforce, Manage Faculty Events, Use, Honors and Awards, Honors Awards**
Access Requirements	Enter an Employee ID.



Honors Awards page

Honor or Award Select the **Honor or Award** code from the list of available options. The list of honors and awards defaults from the Honor/Award Table.

If you choose an honor or award code and tab out of the field, the system automatically displays the honor/award description.

If you choose not to select an honor or award from the available options, you can enter your own description.

Grantor Enter the name of the person or organization that is the **Grantor** of the award.

Issue Date Enter the Date the honor or award was issued.

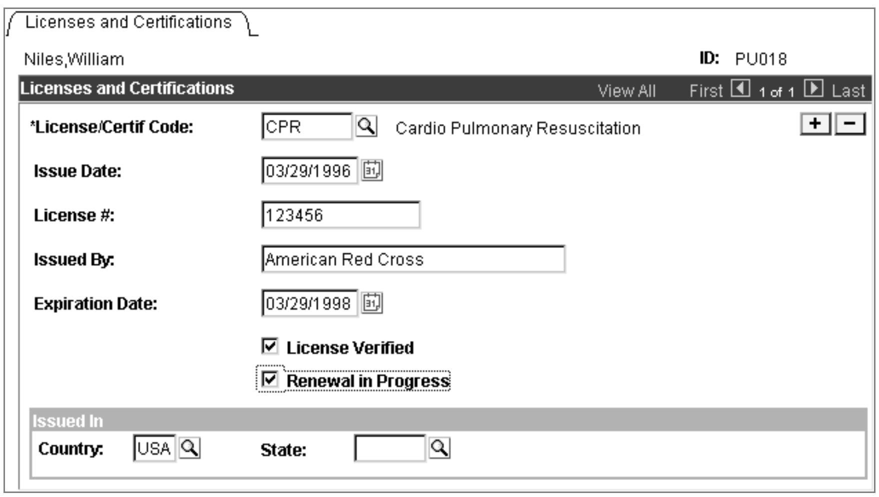
End Date Enter the end date for the honor or award, if appropriate.

Tracking Licenses and Certificates

Use the Licenses and Certificates page to record licenses and certificates that are pertinent to an employee's job.

Licenses and Certificates Page

Usage	Use the Licenses and Certificates page to record licenses and certificates that are pertinent to an employee's job.
Object Name	EG_LICENSE_CERTIFS
Navigation	**Develop Workforce, Manage Faculty Events, Use, Licenses and Certificates, Licenses and Certifications**
Access Requirements	Enter an Employee ID.



Licenses and Certificates page

License/Certif Code — Select the **License/Certi**fication **Code** for the license or certificate the employee earned. You can add additional codes on the License/Certification Table.

Issue Date — Enter the date the license or certificate was issued to the employee.

License # — Enter the **License #** (Number) of the license or certificate, if any.

Issued By — Indicate the person or organization the license or certification is issued by.

Expiration Date — If the license or certificate is temporary and expires at some point, enter the expiration date.

License Verified

If you have confirmed that this employee holds the license or certificate, select the **License Verified** check box.

Renewal in Progress

Select the **Renewal in Progress** check box if the person is currently renewing the license or certificate.

Country and **State**

Indicate the country and state in which the license or certification was issued**.**

Though it isn't required, you can select the state in which the license was issued.

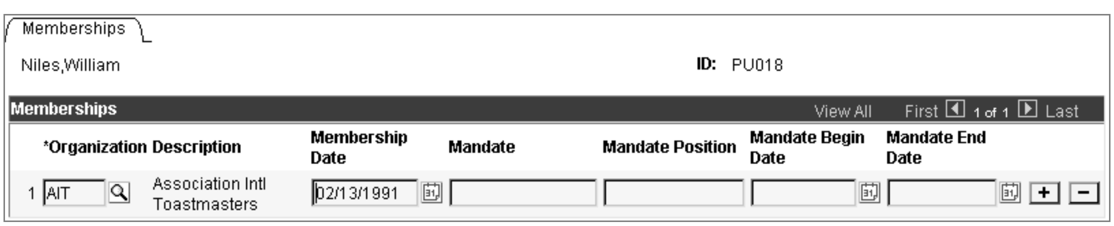
If you select a different **Country** code (after you've already selected a State code), the system clears the value in the **State** field.

Tracking Memberships

Use the Memberships page to maintain membership in professional organizations that are pertinent to an employee's job.

Memberships Page

Usage	Use the Memberships page to maintain membership in professional organizations that are pertinent to an employee's job.
Object Name	EG_MEMBERSHIPS
Navigation	**Develop Workforce, Manage Faculty Events, Use, Memberships, Memberships**
Access Requirements	Enter an Employee ID.



Memberships page

Organization

If the employee belongs to any professional organizations, select the code for the membership **Organization** from the list of available values. You can add additional valid values on the Membership Table.

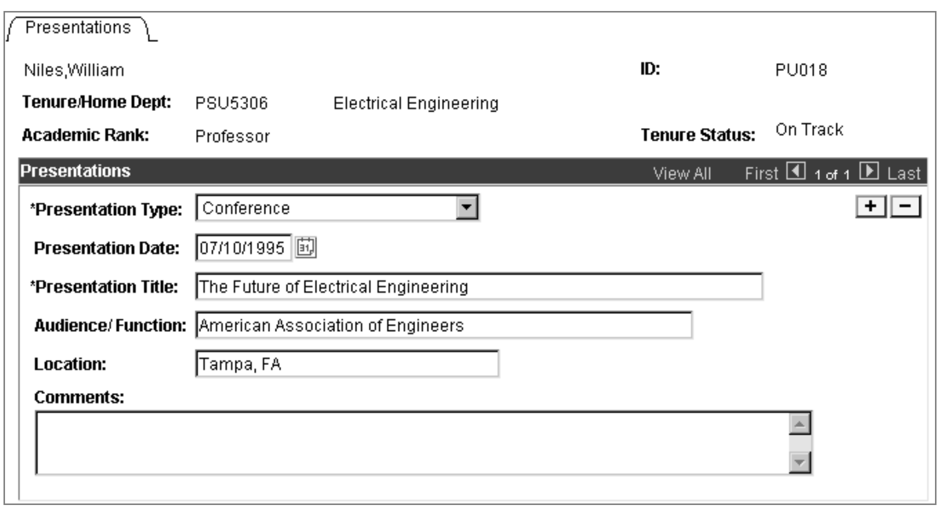
Description	Displays the **Description** of the **Organization** code you selected.
Membership Date	Enter the date the employee became a member of the organization.
Mandate	If applicable, enter a **Mandate.**
Mandate Position	If applicable, enter the **Mandate Position.**
Mandate Begin and **Mandate End Dates**	If applicable, enter the dates the mandate position begins and ends.

Tracking Presentations

Use the Presentations page to record employee's presentations.

Presentations Page

Usage	Use the Presentations page to record employee's presentations.
Object Name	EG_PRESENTATIONS
Navigation	**Develop Workforce, Manage Faculty Events, Use, Presentations, Presentations**
Access Requirements	Enter an Employee ID.



Presentations page

The top section of this page displays the employee's name, **ID, Tenure/Home Depart, Academic Rank,** and **Tenure Status.**

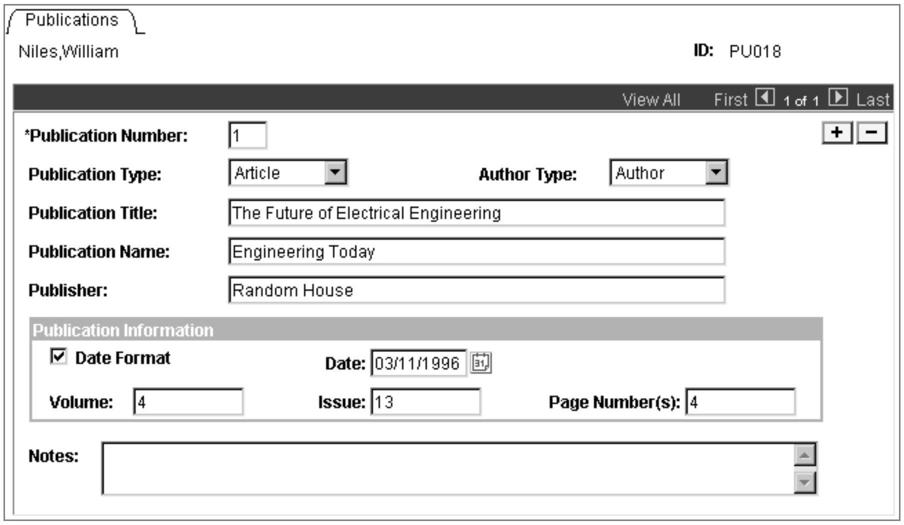
Presentation Type	Select the type of presentation the employee gave, such as ***LEC*** (Lecture) from the list of available options. You can add additional valid **Presentation Type**(s) on the Translate Table.
Presentation Date	Select or enter the date the employee made the presentation.
Presentation Title	Enter the title of the presentation.
Audience/Function	Enter a description of the audience or function of the audience for the presentation.
Location	Enter the **Location** (e.g. City and State) in which the presentation was given.
Comments	Enter comments on the presentation.

Tracking Publications

Use the Publications page to track the type and number of publications for an employee.

Publications Page

Usage	Use the Publications page to track the type and number of publications for an employee.
Object Name	EG_PUBLICATIONS
Navigation	**Develop Workforce, Manage Faculty Events, Use, Publications, Publications**
Access Requirements	Enter an Employee ID.



Publications page

Publication Number Displays the number of the publication in sequence. The system fills this field automatically as you add publications.

Publication Type Select the type of media used for the publication, such as ***Book***, or ***Video***, from the list of available options.

Options are maintained on the Translate Table.

Author Type Select the role the employee had for the publication, such as ***Author***, ***Co-author***, or ***Editor***, from the list of available options.

Author Types are set up on the Translate Table.

Publication Title Enter the title of the publication.

Publication Name Enter the name of the publication, such as ***Economics Today (book series)***.

Publisher Enter the publisher's name.

Publication Information

Use the **Publication Information** section of the page to maintain information about the date, volume, issue, and page number of a publication.

Date Format Select this check box to enter the date in the format ***MM/DD/YYYY***. Leave this check box clear if only the year will be entered in **Date**.

Date Enter the date of publication.

Volume If applicable, enter the volume number of the publication.

Issue If applicable, enter issue information.

Page Number(s) If applicable, enter the number of pages of the publication.

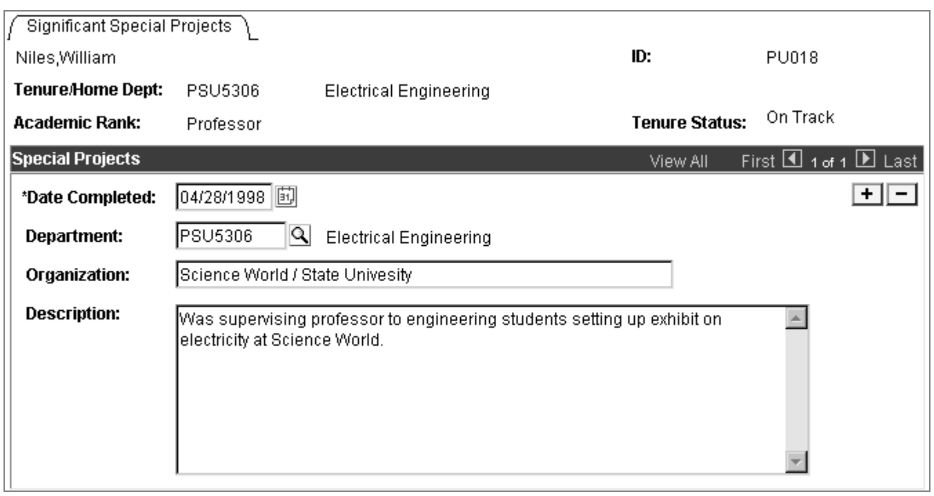
Notes Enter notes about the publication.

Tracking Significant Special Projects

Use the Significant Special Projects page to record special projects that benefit an employee's professional standing.

Significant Special Projects Page

Usage	Use the Significant Special Projects page to record special projects that benefit an employee's professional standing.
Object Name	EG_SPECIAL_PROJECT
Navigation	**Develop Workforce, Manage Faculty Events, Use, Significant Special Projects, Significant Special Projects**
Access Requirements	Enter an Employee ID.



Significant Special Projects

The top section of this page displays the employee's name, **ID, Tenure/Home Depart, Academic Rank,** and **Tenure Status.**

Use the **Special Projects** section to enter information about special projects completed either at or outside your organization.

Date Completed Enter the date the special project was completed.

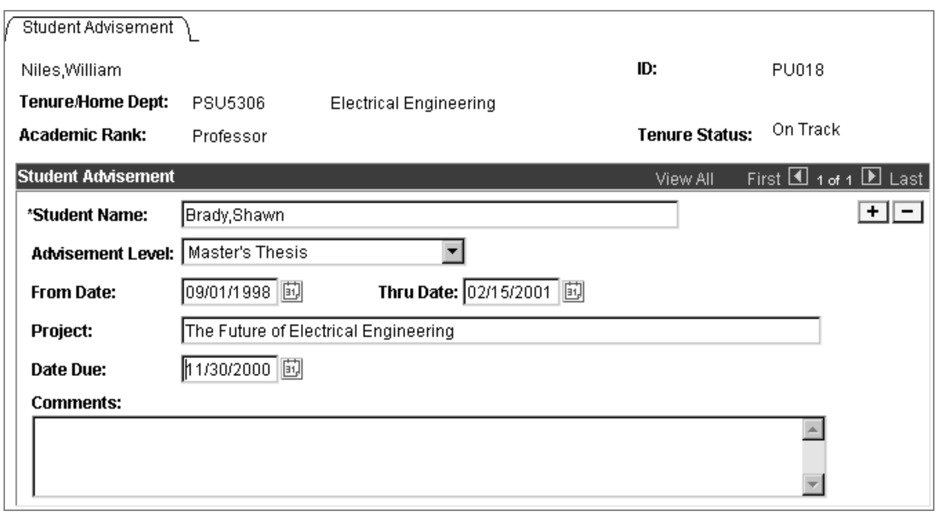
Department	Select the employee's Department from the list of available options.
Organization	Enter the internal or external organization for which the special project was completed.
Description	Enter a description of the special project.

Tracking Student Advisement

Use the Student Advisement page to record and track faculty's student advisees.

Student Advisement Page

Usage	Use the Student Advisement page to record and track faculty's student advisees.
Object Name	EG_ADVISEMENT
Navigation	**Develop Workforce, Manage Faculty Events, Use, Student Advisement, Student Advisement**
Access Requirements	Enter an Employee ID.



Student Advisement page

The top section of this page displays the employee's name, **ID, Tenure/Home Depart, Academic Rank,** and **Tenure Status.**

Student Advisement

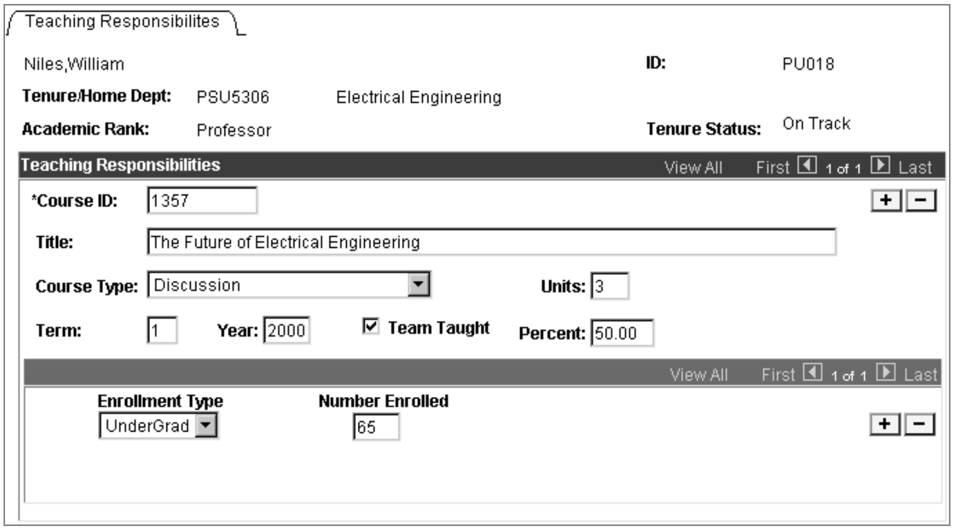
Student Name	Enter the student advisee's name in the following format: ***Johnson,Jill***
Advisement Level	Select the advisement level from the list of available options. PeopleSoft delivers the system with two Advisement Levels, ***Master's Thesis*** and ***PhD Dissertation***. You can add your own levels on the Translate Table.
From Date	Enter the beginning date of the advisement period.
Thru Date	Enter the ending date of the advisement period.
Project	Enter a description of the project.
Date Due	Enter the date the project is due.
Comments	Enter comments.

Tracking Teaching Responsibilities

Use the Teaching Responsibilities page to record and track faculty's teaching responsibilities.

Teaching Responsibilities Page

Usage	Use the Teaching Responsibilities page to record and track faculty's teaching responsibilities.
Object Name	EG_TEACHING_RESP
Navigation	**Develop Workforce, Manage Faculty Events, Use, Teaching Responsibilities, Teaching Responsibilities**
Access Requirements	Enter an Employee ID.



Teaching Responsibilities page

The top section of this page displays the employee's name, **ID, Tenure/Home Depart, Academic Rank,** and **Tenure Status.**

Teaching Responsibilities

Course ID	Enter the course ID, such as ***TF001*** (Teach.)
Title	Enter the title of the course.
Course Type	Select the **Course Type,** such as ***Lecture***, from the list of available options. You can add additional **Course Type**(s) on the Translate Table.
Units	Enter the number of units for the course.
Term	Enter the term in which the course is taught. For example, enter ***2*** to indicate the course is taught in the second term.
Year	Enter the year in which the course taught.
Team Taught	Select the **Team Taught** check box if a team of instructors teaches the course.
Percent	Enter the percent of the course for which the employee is responsible to teach.
Enrollment Type	Select the **Enrollment Type,** such as ***UnderGrad***, from the list of available options. You can add additional **Enrollment Types** on the Translate Table.
Number Enrolled	Enter the number of students enrolled in the course by type.

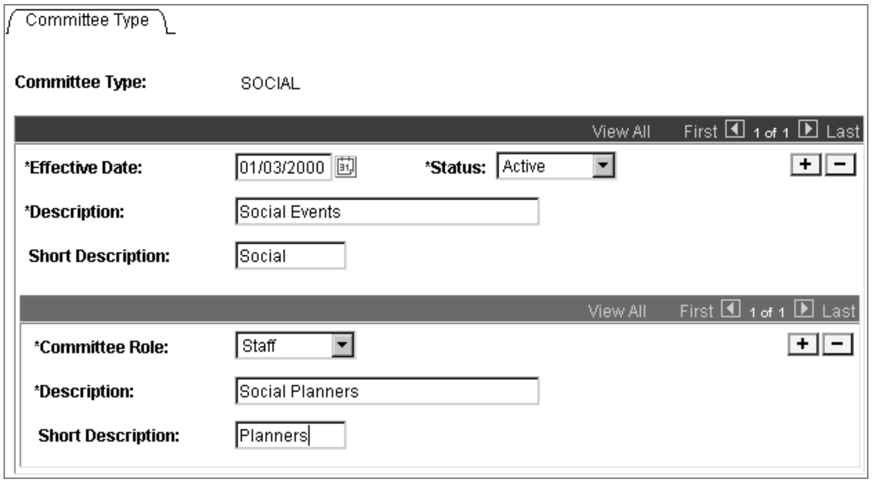
Tracking Committee Information

Tracking Events offers a comprehensive feature to set up committees and track employee participation in them. The following table describes the pages you use to set up and track committee information.

Use this page...	***To do this...***
Committee Type Table	Maintain different committee types and committee roles within each type. The committee types that you set up in this page display in the Committee page.
Committee	Establish a committee and attach a committee type to it. For example, you can establish the research **Committee Type** and attach it to the research and development committee.
Committee Members	Assign employees to a committee type within the committee.
Employee Committees	View committee membership for an individual employee.

Committee Type Page

Usage	Use the Committee Type Table page to maintain different committee types and committee roles within each type. The committee types that you set up in this page display in the Committee page.
Object Name	EG_COMMITTEE_TABLE
Navigation	**Develop Workforce, Manage Faculty Events, Setup, Committee Type Table, Committee Type Table**
Access Requirements	Enter a Committee Type.



Committee Type page

Effective Date Enter the date the committee type becomes effective.

Status Select the status of the committee. Available options include ***Active*** or ***Inactive***.

Description Enter a description of the committee type, such as ***Curriculum Design***.

Short Description Enter a short description of the committee type, such as ***Curriculum***.

Committee Role Select a role on the committee type, such as ***Admin Supp*** (administrative support), from the list of available options.

Committee Roles are maintained on the Translate Table and can be modified there.

Note. You can only add additional **Committee Role**(s) to new **Committee Type**(s), not to existing **Committee Types.**

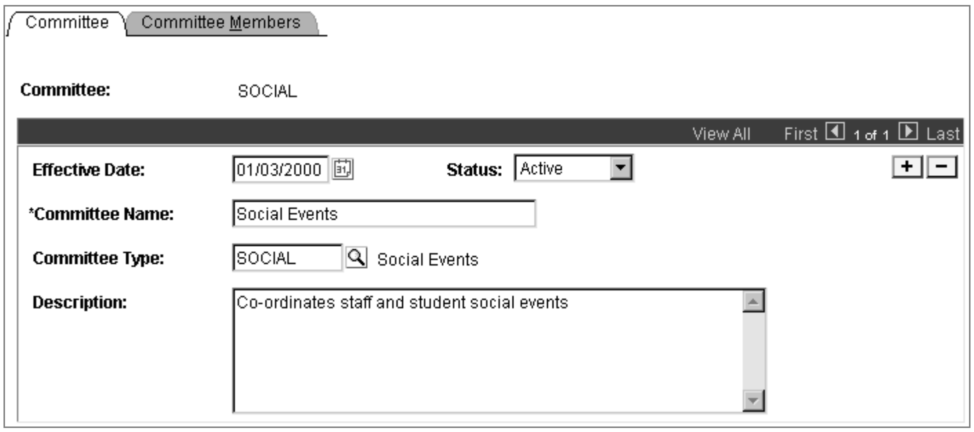
Description Enter a **Description** for the selected the committee role. For example, ***Documentation and Scheduling*** describes the committee role of an administrative support person.

Short Description Enter a short description of the committee type, such as ***Doc and Sched***.

Committees – Committee Page

Usage	Use the Committee page to establish a committee and attach a committee type to it.

Object Name	EG_COMMITTEE
Navigation	**Develop Workforce, Manage Faculty Events, Setup, Committees, Committee**
Prerequisites	You must have set up a Committee Type on the Committee Type page.
Access Requirements	Enter a Committee.



Committees – Committee page

Committee Displays the short name of the selected committee, such as ***RESEAR*** (Research).

Effective Date Enter the date the committee becomes effective. The default is the current date.

Status Select the committee status. Available options include ***Active*** or ***Inactive***. The default is ***Active***.

Committee Name Enter the name of the committee.

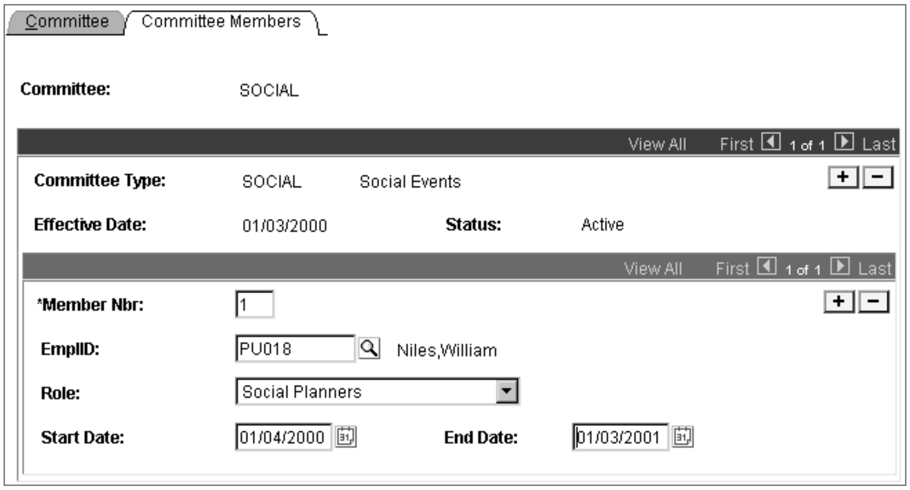
Committee Type Select the type of committee, such as ***Research*** or ***Education***, from the list of available options. You can add additional entries on the Committee Type Table.

Description Enter a description of the committee.

Committee – Committee Members Page

Usage	Use the Committee Members page to assign employees to a committee.
Object Name	EG_COMMITT_MEMBRS
Navigation	**Develop Workforce, Manage Faculty Events, Setup, Committees, Committee Members**

Prerequisites	You must have set up a Committee Type on the Committee Type page.
Access Requirements	Enter a Committee.



Committee Members

Member Nbr	Displays the number of committee members in increments of one for each new row.
EmplID	Select the employee who is a member of this committee from the list of available options.
Role	Select the role of the committee member, such as ***Chair***, from the list of available options. You can add additional roles on the Committee Type table.
Start Date	Enter the date the committee membership becomes effective.
End Date	Enter the date the committee membership ends.

Employee Committees Page

Usage	Use the Employee Committees page to view committee membership for an individual employee.
Object Name	EG_COMM_MBR_VW
Navigation	**Develop Workforce, Manage Faculty Events, Inquire, Employee Committees, Employee Committees**
Prerequisites	You must have assigned the employee to a Committee on the Committee component.

Access Requirements	Enter an Employee ID.

Employee Committees page

The fields on this page are display only.

Effective Date Displays the date the committee became effective.

Member Nbr Displays the employee's member number from the Committee Table.

Committee Displays the name of the committee.

Role Displays the role the committee member has on the committee, such as ***Member***.

Role defaults from the Committee Members page.

Start Date Displays the date the employee began service on the committee.

End Date Displays the date the employee ended service on the committee.

CHAPTER 3

Reviewing Cases

In many organizations, documents pertaining to faculty personnel actions, such as curriculum vitae, performance, tenure reviews, and sabbatical reviews are maintained in hard copy and transmitted “as a case” to the required reviewers. With Case Review you can track and report information regarding faculty cases online.

While all users with access to an employee's record can view the current status and final outcome of a case, more sensitive information (such as detailed assessments and interim recommendations) are subject to a higher level of security.

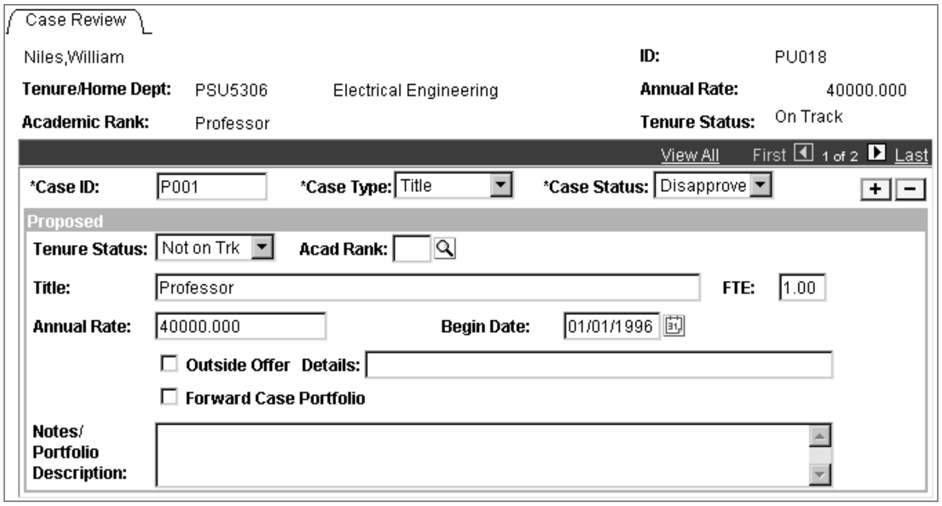
You'll use the Case Review page to define the purpose of the case and how it relates to the faculty member. You can also view case information from this page. You can view sensitive information from specific reviewers and their recommendations on the Review Path page. Use the Case Progress View page to view where the case is in the review process. Then, view the final outcome of the case on the Case Final Status page. The Case Review module includes the Case Review Report that shows the status of each employee's case.

Defining Employee Cases

Use the Case Review page to define the purpose of the case and how it relates to the faculty member. You also use this page to display the current status of the case. The initial entry of a case usually has an ***Open*** status indicating that activity is or will take place. For example, an activity could be a decision to give a faculty member a change in tenure status, or a title change.

Case Review Page

Usage	Use the Case Review page to define the purpose of the case and how it relates to the faculty member.
Object Name	EG_CASE_REVIEW
Navigation	**Develop Workforce, Manage Faculty Events, Use, Case Review, Case Review**
Access Requirements	Enter an Employee ID.



Case Review page

The upper section of the page displays the following default employee information:

Tenure/Home Dept	Displays the employee's home department from the Tenure Data page (if it exists there), otherwise from the Job Data page group.
Annual Rate	Displays the employee's current annual salary from the Job Data page group.
Academic Rank	Displays the employee's academic rank if specified on the Tenure Data page. If not, this field is blank.
Tenure Status	Displays the employee's tenure status if specified on the Tenure Data page. If not, this field is blank.

At the top of the page, enter the following information:

Case ID	Enter a unique case identification number for the employee.
Case Type	Select the type of case, for example, ***Tenure***, from the list of available options. You can add additional **Case Type**(s) on the Translate Table.
Case Status	Select the status of the case from the list of available options. Default available values include:

- ***Approved***
- ***Disapproved***
- ***In Appeal***
- ***Open***

You can add additional entries on the Translate Table.

Proposed

Tenure Status	Select a ***proposed*** tenure status from the list of available options for this employee.
Acad Rank	Select the ***proposed*** academic rank from the list of available options for this employee. You can add additional entries on the Academic Rank page.
Title	Enter the proposed title.
FTE	Enter the proposed full-time equivalent for this position.
Annual Rate	Enter the proposed annual rate.
Begin Date	Enter the proposed date of the change.
Outside Offer	Select the **Outside Offer** check box 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 the **Forward Case Portfolio** check box to indicate the case portfolio (paper file) has been forwarded to the reviewers.
Notes/Portfolio Description	Enter notes or a description of the case.

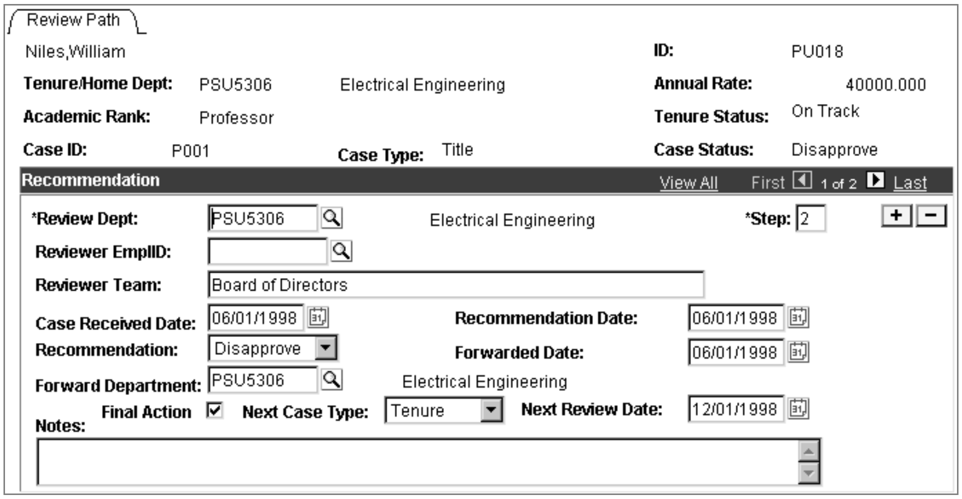
Reviewing Case Information

The Review Path page details sensitive information from specific reviewers and their recommendations. You select the faculty member or employee and the case ID that you want to review. Only users with access to the current (i.e. latest) steps in the review process have access to this page.

Review Path Page

Usage	Use the Review Path page to review sensitive information from specific reviewers and their recommendations. You select the faculty member or employee and the case ID that you want to review.
Object Name	EG_REVIEW_PATH
Navigation	**Develop Workforce, Manage Faculty Events, Use, Review Path, Review Path**
Prerequisites	You must have established a Case ID on the Case Review page.

Access Requirements	Enter an Employee ID and Case ID.



Review Path page

The upper section of the page displays the following default information about the employee and his/her case:

Tenure/Home Dept Displays the employee's home department from the Tenure Data page (if it exists there), otherwise from the Job Data page group.

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

Academic Rank Displays the employee's academic rank if specified on the Tenure Data page. If not, this field is blank.

Tenure Status Displays the proposed tenure status for the employee.

Case ID Displays a unique case identification number for the employee.

Case Type Displays the **Case Type** selected in the Case Review page.

Case Status Displays the **Case Status** selected in the Case Review page.

Recommendation

Use the **Recommendation** section of the Review Path page to enter each reviewer's (or reviewing department's) recommendation information for a particular case.

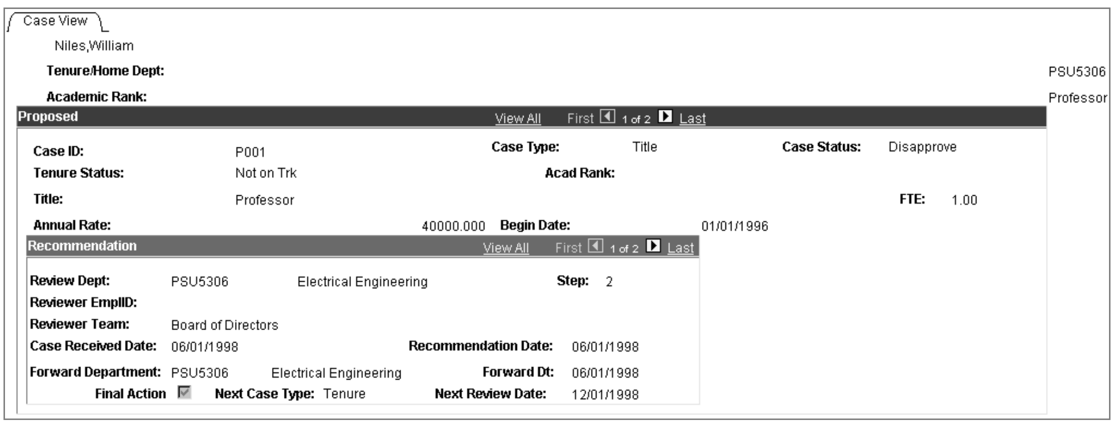
Review Dept	Select the appropriate ID for the department reviewing the case from the list of available options. For example, select ***D2142*** (Economics Department).
Step	There can be multiple reviewers per an employee ID/case. Each one is assigned a step number. Use the scroll bar to display multiple reviewers. As you insert rows, the Step is incremented by 1.
Reviewer EmplID	Select the employee ID of the person reviewing the case.
Reviewer Team	For team review, enter the team name or department description.
Case Received Date	Enter the date the case was received by this reviewer.
Recommendation Date	Enter the date the recommendation is made.
Recommendation	Select the proposed action for the case. For example, select ***Approve*** to indicate the reviewer approves the request for tenure. We deliver the system with two **Recommendation** values, ***Approve*** and ***Disapprove***. You can add additional entries on the Translate Table.
Forwarded Date	If this isn't the final step in the review process, enter the date the case is forwarded.
Forward Department	If this isn't the final step in the review process, select the department to which the case is forwarded (i.e. the next reviewer) from the list of available options.
Final Action	Select the **Final Action** check box if this is the last reviewer of the case.
Next Case Type	This field is displayed if the **Final Action** is checked. If applicable, select the **Next Case Type** indicating the next type of case anticipated for this employee.
Next Review Date	This field is displayed if the **Final Action** is checked. Enter the next review date, if applicable.
Notes	Enter any notes for this case.

Viewing Case Progress and Status

Case Review enables you to view where the case is in the review process and the final outcome of the case. Then, you'll view the final outcome of the case on the Case Final Status page. Both pages are available to all users with access to an employee's job record.

Case View Page

Usage	Use the Case Progress View page to view case data and recommendation information from the Case Review and Review Path pages. The Case Progress View page combines the information from the Case Review and the Review Path page so that you can view the non-sensitive case information on one page. This is a display only page.
Object Name	EG_CASE_REVIEW_VW
Navigation	**Develop Workforce, Manage Faculty Events, Inquire, Case Progress View, Case View**
Prerequisites	Employee must have a Review Path record.
Access Requirements	Enter an Employee ID.



Case View page

Tenure/Home Dept Displays the employee's home department from the Tenure Data page (if it exists there), otherwise from the Job Data page group.

Academic Rank Displays the employee's academic rank if specified on the Tenure Data page. If not, this field is blank.

Proposed

Case ID Displays a unique case identification number for the employee.

Case Type Displays the type of case from the Case Review page.

Case Status Displays the status of the case from the Case Review page.

Tenure Status Displays the tenure status proposed for the employee.

Acad Rank	Displays the employee's academic rank if specified on the Tenure Data page. If not, this field is blank.
Title	Displays the proposed title.
FTE	Displays the proposed full time equivalent for this position.
Annual Rate	Displays the proposed annual salary.
Begin Date	Displays the proposed date of the change.

Recommendation

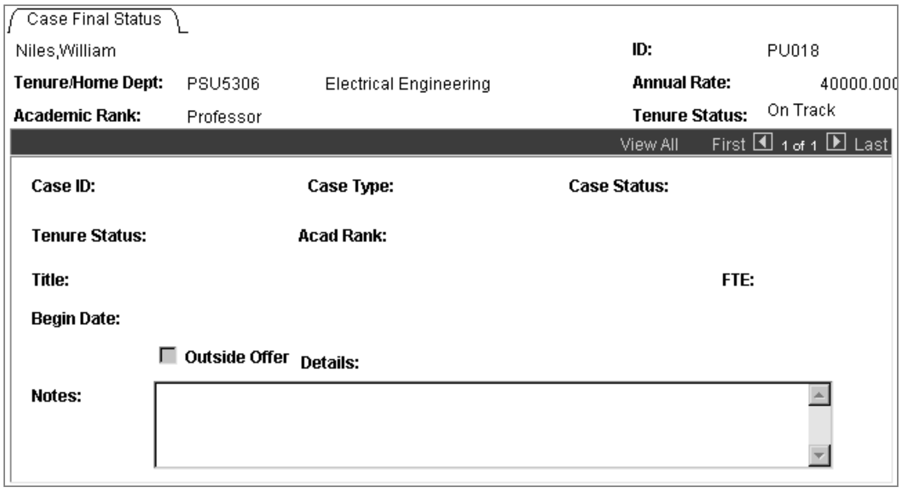
The **Recommendation** section of the Case Progress View page displays the following less sensitive information from the Review Path page:

Review Dept	Displays the code for the department reviewing the case.
Step	There can be multiple reviewers per employee ID/case. Each one is assigned a step number.
Reviewer EmplID	Displays the employee ID of the person reviewing the case.
Reviewer Team	Displays a description of the team reviewing the case, such as, ***Economics Department***.
Case Received Date	Displays the date the case was received by the reviewer.
Recommendation Date	Displays the date the recommendation was made.
Forward Department	Displays the department to which the recommendation was forwarded.
Forward Dt	Displays the date the recommendation was forwarded.
Final Action	The **Final Action** check box is selected if it was selected in the Review Path page.
Next Case Type	This field is populated if **Next Case Type** entered in the Review Path page.
Next Review Date	This field is populated if **Next Review Date** was entered on the Review Path page.

Case Final Status Page

Usage	Use the Case Final Status page to view the final or ***approved*** employee cases. Only details from ***Approved*** cases are shown.
Object Name	EG_CASE_FIN_VW

Navigation	**Develop Workforce, Manage Faculty Events, Inquire, Case Final Status, Case Final Status**
Prerequisites	Case must have a Review Path record.
Access Requirements	Enter an Employee ID.



Case Final Status page

Tenure/Home Dept Displays the employee's home department from the Tenure Data page (if it exists there), otherwise from the Job Data page group.

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

Academic Rank Displays the employee's academic rank if specified on the Tenure Data page. If not, this field is blank.

Tenure Status Displays the tenure status approved for the employee.

The lower section of the Case Final Status page displays the following information:

You can use the information in this section of the page as a reference when you enter resulting changes on the faculty member's Job Data page group.

Case ID Displays a unique case identification number for the employee.

Case Type Displays the type of case from the Case Review page.

Case Status	Displays the status of the case from the Case Review page. Since this is the Case Final status, this field always displays as ***Approved***.
Tenure Status	Displays the tenure status approved for the employee as entered on the Case Review page.
Acad Rank	Displays the approved **Academic Rank.** Otherwise, this field displays the employee's academic rank if specified on the Tenure Data page; if not, this field is blank.
Title	Displays the approved title.
FTE	Displays the approved full time equivalent for this position.
Begin Date	Displays the approved date of the change.
Outside Offer	Displays the **Outside Offer** check box from the Case Review page, if the check box was selected.
Details	Displays details of the outside offer, if any.
Notes	If **Notes** were entered on the Case Review page, they display here.

CHAPTER 4

Canada Academic Teaching Surveys Business Process

Statistics Canada requires that all Canadian universities (all degree granting institutions) produce full-time and part-time Canada Academic Teaching Surveys. These reports are a legislative requirement. Tracking Faculty Events provides you with the functionality to code HRMS information using Statistics Canada codes and create both the full-time and part-time Academic Teaching Surveys.

This section will outline the system setup required to run the reports and detail the new pages we have provided for you to produce the Academic Teaching Surveys.

Setting Up the Canada Academic Teaching Surveys Business Process

To run the Academic Teaching Surveys there are a number of tables that you must set up. Many of these tables are required to run most PeopleSoft HRMS features and are described elsewhere in the documentation. Some tables are setup tables for Tracking Faculty Events and are described elsewhere in this book. The remaining setup tables are specific to the Academic Teaching Surveys business process and are described here.

The following PeopleSoft HRMS control tables must be set up before you can create the Academic Teaching Surveys. In addition to fields that are used system-wide, each table has one or more fields that are used in the Statistics Canada reports. These fields are indicated next to the table name.

- Department Table: StatsCan - Dept and StatsCan - Faculty.

StatsCan - Faculty values must be defined on the Faculty Code Table first.

- Job Code Table: Stats-Can Teaching Survey Codes
- Company Table: Stats-Can Institution Code
- Country Table: Statistics Canada Location Code.

PeopleSoft delivers this table with the Statistics Canada Location Code entered. PeopleSoft doesn't maintain this information.

- Canadian Tax Table: Stats Can Province Code

PeopleSoft delivers this table with the Statistics Canada Location Code entered. PeopleSoft doesn't maintain this information.

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

The following Tracking Faculty Events tables must be set up before you can create the Canada Academic Teaching Surveys. Each table includes a field that is used in the Statistics Canada reports. These fields are indicated next to the table name.

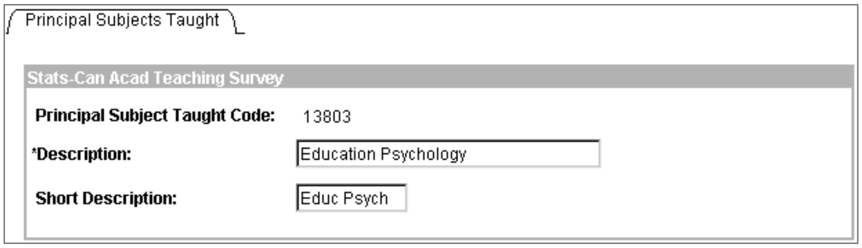
- Academic Rank: Rank-Stats Can
- Administrative Posts: Stats Can Responsibility

The following pages are used specifically for the purposes of Canada Academic Teaching Surveys reporting and their set up is described in this section:

- Principal Subjects Taught Table
- Faculty Code Table
- Non-Operational Funds Table
- Reporting Period Table

Principal Subjects Taught Page

Usage	Use the Principal Subjects Taught page to maintain Statistics Canada principal subjects taught codes and descriptions. PeopleSoft delivers this table populated with Statistics Canada values but you must maintain the values.
Object Name	HP_STATS_SUBJECTS
Navigation	**Develop Workforce, Manage Faculty Events, Setup, Principal Subjects Taught, Principal Subjects Taught**
Access Requirements	Enter a Principal Subject Taught Code.



Principal Subjects Taught page

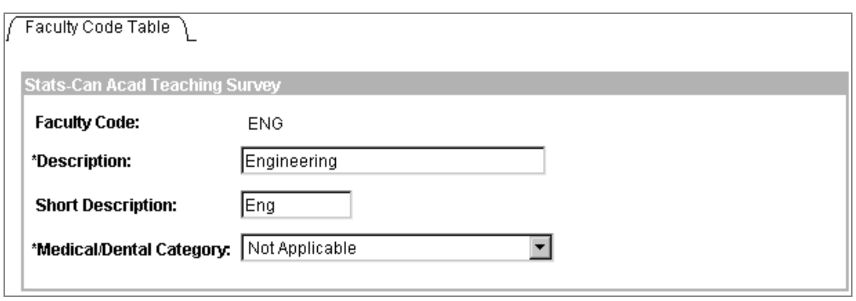
The following elements are common to multiple pages and are defined at the front of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Description** and **Short Description.**

Principal Subject Taught Code

The **Principal Subject Taught Code** is a Statistics Canada code that is associated with a subject **Description** and **Short Description**. You use this code to identify which subjects are taught by academic teaching members in the Canadian Academic Teaching Employment Table on the Employment Data - Employment Information page.

Faculty Code Table Page

Usage	Use the Faculty Code Table page to store information regarding faculty codes. The Department Table references this table to associate a faculty with a department.
Object Name	HP_STATS_FACULTY
Navigation	**Develop Workforce, Manage Faculty Events, Setup, Stats-Can Faculty Code Table, Faculty Code Table**
Access Requirements	Enter a Faculty Code.



Faculty Code Table page

The following elements are common to multiple pages and are defined at the front of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Description** and **Short Description.**

Faculty Code

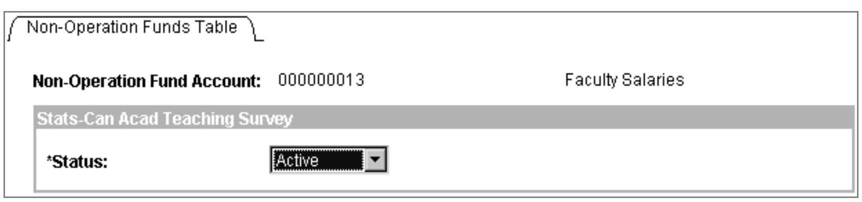
The **Faculty Code** represents a faculty at your educational institution and is associated with a subject **Description** and **Short Description**. You can associate **Faculty Codes** with departments on the Department Table.

Medical/Dental Category

Select a **Medical/Dental Category** to associate with the **Faculty Code** from the list of available options. The system uses the **Faculty Code** selected on the Department Table to determine which **Medical/Dental Category** should be reported on the Canada Academic Teaching Survey.

Non-Operational Funds Table Page

Usage	Use the Non-Operational Funds Table to identify non-operational funding sources. This table is used together with the account code on the Job Earnings Distribution page to calculate the salary source for each employee reported on the Statistics Canada Full-Time Academic Teaching Survey. This table is intended for use by Ontario universities only.
Object Name	HP_NON_OP_FUNDS
Navigation	**Define Business Rules, Define Commit Accounting(CAN), Setup, Non-Operational Funds Table, Non-Operation Funds Table**
Access Requirements	Enter a Non-Operation Fund Account in the search dialog box.



Non-Operational Funds Table page

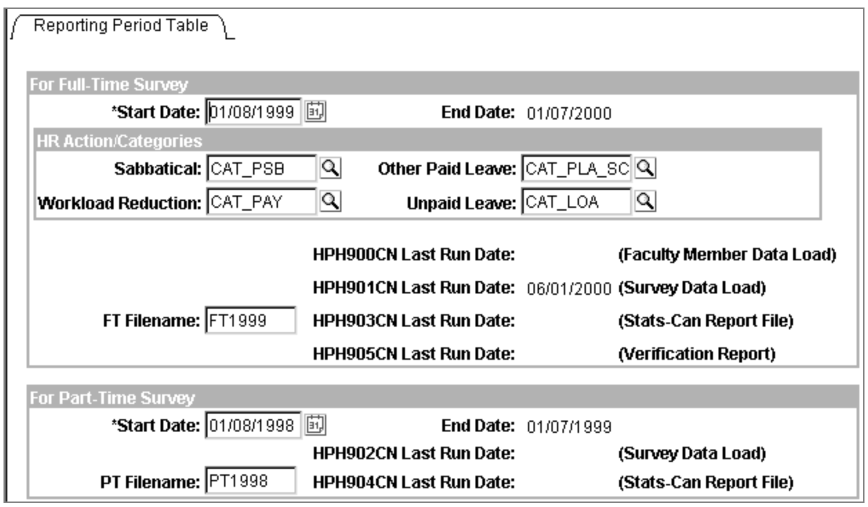
The following element is common to multiple pages and is defined at the front of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Status.**

Non-Operation Fund Account

Enter an account code in the **Non-Operation Fund Account** field. The system uses **Non-Operation Fund Account** with the account code on the Job Earnings Distribution page to calculate the salary source for each employee reported on the Canada Full-Time Academic Teaching Survey.

Reporting Period Table Page

Usage	Use the StatsCan Reporting Period page to create and maintain report period dates and parameters for the Statistics Canada Academic Teaching Survey run controls. You will update the StatsCan Reporting Period each reporting year.
Object Name	HP_RPTNG_PRD_PNL
Navigation	**Develop Workforce, Manage Faculty Events, Setup, Stats-Can Reporting Period, Reporting Period Table**
Access Requirements	None



Reporting Period Table page

For Full-Time Survey

Start Date Enter the **Start Date** of the period you are reporting for the Full-Time Academic Teaching Survey. The system will use this date to calculate the survey **End Date**.

End Date The system will calculate the **End Date** of the period you are reporting for the Full-Time Academic Teaching Survey using the **Start Date** that you entered above. The **End Date** is one year less a day from the **Start Date**.

HR Action/Categories

HR Action/Categories are defined on the HR Action/Categories page.

Sabbatical	Select which HR category represents a **Sabbatical** from the list of available options. The system will count HR actions that fall into this category as **Sabbatical** on the Statistics Canada Academic Teaching Survey.
Workload Reduction	Select which HR category represents **Workload Reduction** from the list of available options. The system will count HR actions that fall into this category as **Workload Reduction** on the Statistics Canada Academic Teaching Survey.
Other Paid Leave	Select which HR category represents **Other Paid Leave** from the list of available options. The system will count HR actions that fall into this category as **Other Paid Leave** on the Statistics Canada Academic Teaching Survey.
Unpaid Leave	Select which HR category represents **Unpaid Leave** from the list of available options. The system will count HR actions that fall into this category as **Unpaid Leave** on the Statistics Canada Academic Teaching Survey.
FT Filename (Full-time Filename)	Enter the FT Academic Teaching Survey flat file name. You don't need to indicate a file suffix.

For Part-Time Survey

Start Date	Enter the **Start Date** of the period you are reporting for the Part-Time Academic Teaching Survey. The system will use this date to calculate the survey **End Date**.
End Data	The system will calculate the **End Date** of the period you are reporting for the Part-Time Academic Teaching Survey using the **Start Date** that you entered above.
PT Filename (Part-time Filename)	Enter the PT Academic Teaching Survey filename.

Entering Employee Level Data for the Canada Academic Teaching Surveys

To accurately report on your academic teaching staff you must associate some of the Statistics Canada codes defined above, in addition to other information, with your employee's records. You can use the Statistics Canada Academic Teaching Employment Table on the Employment Data - Employment Information page to add data required by Statistics Canada to your academic staff's employee records.

Populating and Modifying Data in the FT Academic Teaching Member Table

Use the Load FT Teaching Member Data process (HPH900CN.SQR) to populate the FT Academic Teaching Member table. Once you've populated the FT Academic Teaching Member table, you can review, add, delete, and modify employee records.

You must populate the FT Teaching Member table to run the FT Academic Teaching Survey. If an employee doesn't have a record in the FT Teaching Member table for the year being reported then they won't be reported on the FT Academic Teaching Survey. There is no corresponding table for employees reported on the PT Academic Teaching Survey.

The information that is stored in the FT Teaching Member table is what is reported in the FT Academic Teaching Survey. You can modify information on this table to better control the results that are reported to Statistics Canada. This includes adding and deleting FT Teaching Member records, as well as modifying records for more accuracy.

The Load FT Teaching Member Data process captures employee data for regular and temporary full-time employees with a job record prior or equal to October first of the reporting year and a job record in the Statistics Canada Academic Employment Teaching Table (located on the Employment Data - Employment Information page).

Important! The first time you use PeopleSoft's Canada Academic Teaching Survey business process you must load your prior year's data into the system. Some of the information for the current year's report is derived from the previous year's report.

Load FT Teaching Member Data Page

Usage	Use the Load FT Teaching Member Data process page to load full-time teaching member data into the Member Data table. If you re-run this process for any given reporting year you will overwrite all of the records in the FT Teaching Member table, including records that were added, deleted, or modified manually in the table for that reporting year.
Object Name	RUNCTL_HPH900CN
Navigation	**Develop Workforce, Manage Faculty Events, Process, Load FT Teaching Member Data, Load FT Teaching Member Data**
Prerequisites	Statistics Canada Academic Teaching Employment Table on the Employment Data - Employment Information page.
Access Requirements	Enter a Run Control ID.

Load FT Teaching Member Data page

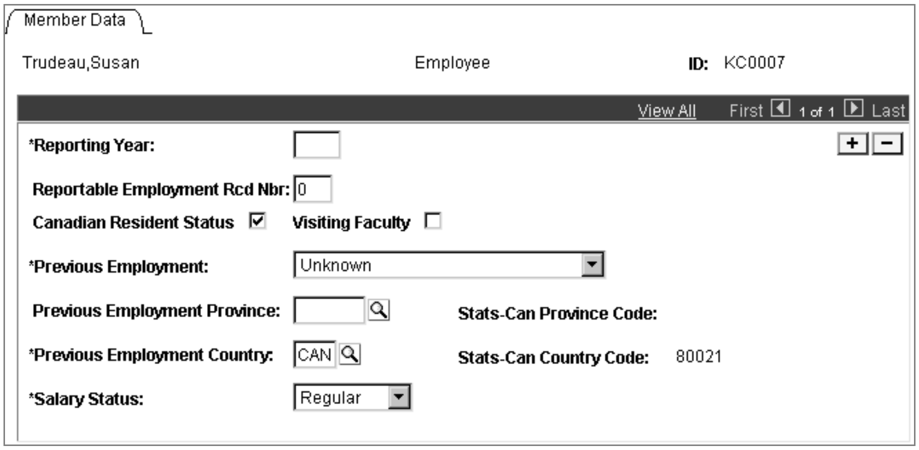
Reporting Period	Displays the year of the data that will be loaded into the FT Academic Teaching Member table. **Reporting Periods** are defined on the Reporting Period page.
Start Date	Displays the start of the employment year that will be used to assess twelve months of employment and compensation amounts. **Start Dates** are defined on the Reporting Period page.
End Date	Displays the end of the employment year that will be used to assess twelve months of employment and compensation amounts. The **End Date** is calculated by the system based on the **Start Date** and is one year less a day from the **Start Date**.

Click **Run** to run the report using Process Scheduler.

For more information about Process Scheduler, see Process Scheduler.

Member Data Page

Usage	Use the FT Academic Teaching Member page to review, update, delete, or add academic teaching member's records. The information stored in this table is reported in the Statistics Canada Academic Teaching Survey reports.
Object Name	HP_FT_TEACH_MEMBER
Navigation	**Develop Workforce, Manage Faculty Events, Use, FT Academic Teaching Member, FT Academic Teaching Member**
Prerequisites	Load FT Teaching Member Data page.
Access Requirements	Enter an Employee ID.



Member Data page

If you insert a new row the field values from the previous reporting year, assuming there is one, will default, with the exception of the **Reporting Year** field.

You can't delete an Academic Teaching Member record if the employee has a matching record in the Full-Time Academic Teaching Survey table.

Reporting Year
Displays the year of the data that will be reported in the Canada Academic Teaching Survey. If you are manually adding a new FT Academic Teaching Member record, you must enter the reporting year.

Reportable Employment Rcd Nbr (Reportable Employment Record Number)
Enter the number of the employment record of the primary full-time job being reported. If the information for this academic teaching member was loaded using the Load FT Teaching Member Data process then this value is derived from the Statistics Canada Academic Teaching Employment Table on the Employment Data - Employment Information page.

Canadian Resident Status
Indicate if the employee had **Canadian Resident Status** at the time of job offer.

Visiting Faculty
Indicate if the employee is a **Visiting Faculty** member.

Previous Employment
Select the employee's **Previous Employment** from the list of available options.

Previous Employment Province
Select the employee's province of previous employment from the list of available options, if the **Previous Employment Country** is ***Canada***. This field isn't required.

Previous Employment Country
Select the employee's country of previous employment from the list of available options.

Salary Status	Select the employee's **Salary Status** from the list of available options. This field defaults to ***Regular***.

Loading Data into the Academic Teaching Survey Tables

The Load Teaching Survey Data process component is composed of two pages: FT Survey (HPH901CN.SQR) and PT Survey (HPH902CN.SQR). Use the appropriate page to load data into the Academic Teaching Survey tables.

You can load data for all eligible employees or individual employees, as need be. When you run the process for all employees, the process deletes all data from the applicable Academic Teaching Survey table for the reporting year and then recreates the requested survey data. When you run the process for a selected employee, the process overrides, creates, or deletes the survey for that specific employee.

The system writes process errors and missing data detected during the survey creation process to a temporary table. Once all survey records have been created, the creation process will print an Errors and Missing Data report.

The FT Survey load process will create a FT Academic Teaching Survey record for each employee who meets the following conditions:

- Employee has a record in the Member Data table for the reporting year. The employee's job can span the entire reporting year or can have begun during the reported year. Employees who don't have a FT Academic Teaching Member record won't be reported in the Academic Teaching Survey.
- Employee was employed on October first of the reporting year.
- Employee has a Statistics Canada reporting job. The Survey Report Flag on the Statistics Canada Academic Teaching Employment Table on the Employment Data - Employment Information page is set to FT (full-time) or Both.

The PT Survey load process will create a PT Academic Teaching Survey record for each employee who meets the following conditions:

- Employee has a part-time job in effect within the reporting period ***or***

  Employee has a full-time job where then number of months worked in the reporting period is less than 12 ***or***

  Employee has a full-time job with a compensation frequency of contract and the contract period doesn't span the whole reporting period ***or***

  Employee has a full-time job with a compensation frequency that isn't contract and whose appointment (from date of hire to appointment end date) doesn't span the whole reporting year.
- Employee's job (as defined by Emple Rcd#) wasn't reported in the FT Academic Teaching Survey for the same reporting year.
- Employee's job wasn't identified as a Collapse Into FT on the Statistics Canada Academic

Teaching Employment Table on the Employment Data - Employment Information page, effective October first of the reporting year.

- Employee has a Statistics Canada reporting job. The Survey Report Flag on the Statistics Canada Academic Teaching Employment Table on the Employment Data - Employment Information page is set to PT (part-time) or Both.

Standard Element Definitions for the Load Teaching Survey Data Component

Reporting Period Displays the year of the data that will be loaded into the FT or PT Academic Teaching Survey. **Reporting Periods** are defined on the Reporting Period Table.

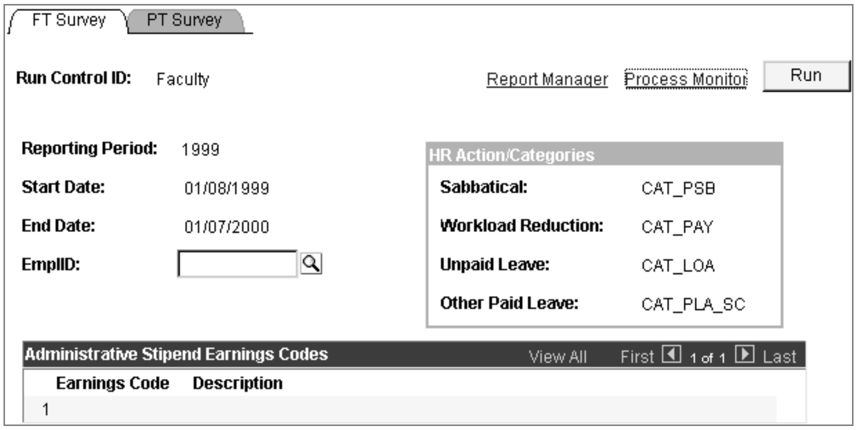
Start Date Displays the start of the employment year that will be used to assess twelve months of employment and compensation amounts. **Start Dates** are defined on the Reporting Period Table.

End Date Displays the end of the employment year that will be used to assess twelve months of employment and compensation amounts. The **End Date** is calculated by the system based on the **Start Date** and is one year less a day from the **Start Date**.

EmplID (Employee ID) Use the EmplID field if you want to create or recreate the Academic Teaching Survey record of a select employee.

FT Survey Page

Usage	Use the Load Teaching Survey Data - FT Survey process page to create a Full-Time Academic Teaching Survey for each full-time employee who qualifies.
Object Name	RUNCTL_HPH901CN
Navigation	**Develop Workforce, Manage Faculty Events, Process, Load Teaching Survey Data, Load FT Survey Data**
Prerequisites	Member Data table must be complete for all FT Academic Teaching Members being reported in the Statistics Canada Academic Teaching Survey.
Access Requirements	Enter a Run Control ID.



FT Survey page

The following elements are common to multiple pages in this component and are defined at the front of this section in Standard Element Definitions for the Load Teaching Survey Data Component: **Reporting Period, Start Date, End Date,** and **EmplID.**

HR Action/Category

Sabbatical — Displays the HR Action/Category defined for a **Sabbatical** leave. These values are set up on the Reporting Period Table.

Workload Reduction — Displays the HR Action/Category defined for a **Workload Reduction**. These values are defined on the Reporting Period Table.

Unpaid Leave — Displays the HR Action/Category defined for a **Unpaid Leave**. These values are defined on the Reporting Period Table.

Other Paid Leave — Displays the HR Action/Category defined for a **Other Paid Leave**. These values are defined on the Reporting Period Table.

Administrative Stipend Earnings Code

Earnings Code — Displays the **Earnings Code** used to pay annual stipends or other honoraria for administrative duties.

Description — Displays the **Description** of the **Earnings Code** used to pay annual stipends or other honoraria for administrative duties.

PT Survey Page

Usage	Use the Load Teaching Survey Data - PT Survey process page to create a Part-Time Academic Teaching Survey for each part-time employee who qualifies.
Object Name	RUNCTL_HPH902CN
Navigation	**Develop Workforce, Manage Faculty Events, Process, Load Teaching Survey Data, Load PT Survey Data**
Prerequisites	Statistics Canada Academic Teaching Employment Table on the Employment Data - Employment Information page.
Access Requirements	Enter a Run Control ID.

PT Survey page

The following elements are common to multiple pages in this component and are defined at the front of this section in Standard Element Definitions for the Load Teaching Survey Data Component: **Reporting Period, Start Date, End Date,** and **EmplID.**

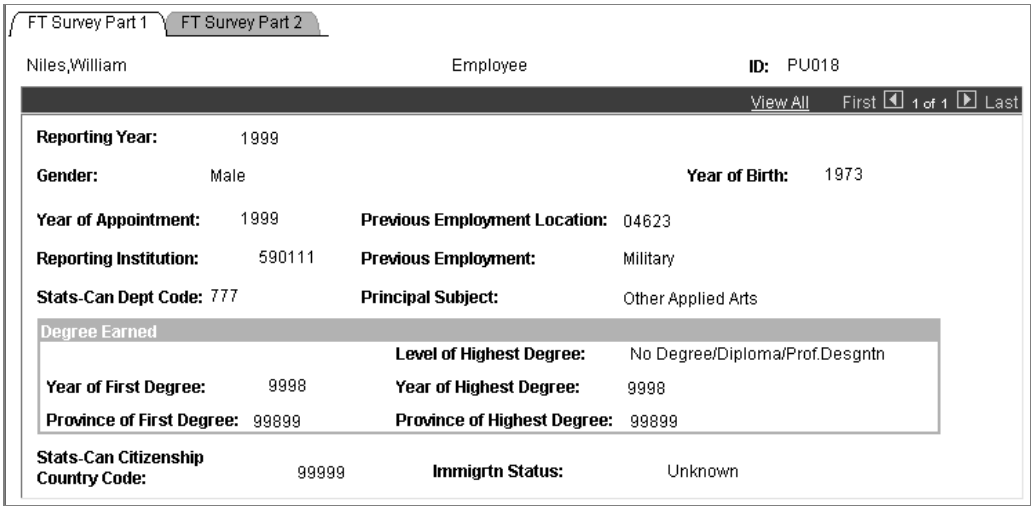
Updating Academic Teaching Surveys

After you have run the Load Teaching Survey Data process you can view the survey information on the FT (Full-Time) or PT (Part-Time) Academic Teaching Surveys Component. You can modify some survey information on these pages but it is preferable to modify the fields at the source of the data and re-create the surveys.

FT Academic Teaching Surveys - FT Survey Part 1 Page

Usage	Use the FT Academic Teaching Surveys - FT Teaching Survey Part 1 to view the results of the Academic Teaching survey for each full-time employee.
Object Name	HP_FT_SURVEY_PNL1
Navigation	**Develop Workforce, Manage Faculty Events, Use, FT Academic Teaching Surveys, FT Teaching Survey Part 1**

Prerequisites	Load Teaching Survey Data -FT Survey process page
Access Requirements	Enter an Employee ID.



FT Academic Teaching Surveys - FT Survey Part 1 page

The following elements are common to multiple pages and are defined at the front of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Gender** and **Year of Birth.** The values for these elements are determined on the Personal Data table.

Reporting Year	Displays the **Reporting Year**. Reporting periods are defined on the Reporting Period Table.
Year of Appointment	Displays the first year the employee was reported in the Statistics Canada Academic Teaching Survey. If there has been a year or more when the employee wasn't reported then this field displays the first year reporting resumed for this employee.
Reporting Institution	Displays the Statistics Canada **Reporting Institution** indicated on the Company Table.
Stats-Can Dept Code (Statistics Canada Department Code)	Displays the Statistics Canada code associated with the department of the primary reported job on the Department Table.
Previous Employment Location	Displays the employee's **Previous Employment Location** as indicated on the Member Data page.
Previous Employment	Displays the employee's **Previous Employment** as indicated on the Member Data page.
Principle Subject	Displays the employee's **Principle Subject**.

Degree Earned

Year of First Degree Displays the year the employee received their first degree as specified on the Professional Ed. and Training page.

Province of First Degree Displays the province in which the employee received their first degree as specified on the Professional Ed. and Training page.

Level of Highest Degree Displays the Statistics Canada degree level (defined on the Degree Table) specified on the Professional Ed. and Training page.

Year of Highest Degree Displays the year the employee received their highest degree as specified on the Professional Ed. and Training page.

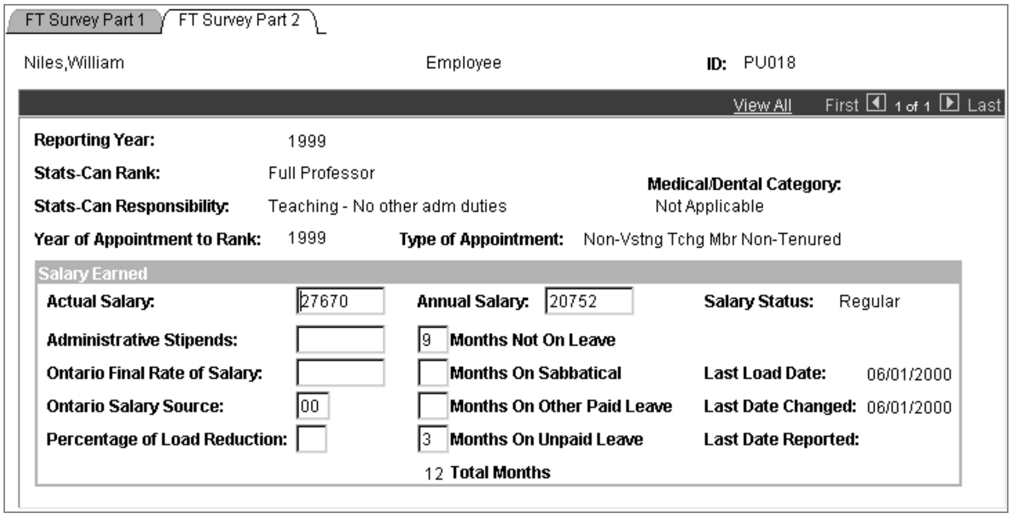
Province of Highest Degree Displays the province in which the employee received their highest degree as specified on the Professional Ed. and Training page.

Stats-Can Citizenship Country Code Displays the **Stats-Can Citizenship Country Code** associated with the employee's country of citizenship, as indicated on the Citizenship/Passport page. **Stats-Can Citizenship Country Codes** are maintained on the Country Table.

Immigrtn Status (Immigration Status) Displays the employee's immigration status as indicated on the Member Data page.

FT Academic Teaching Surveys - FT Survey Part 2 Page

Usage	Use the FT Academic Teaching Survey Part 2 to view the results of the Academic Teaching surveys for each full-time employee. You can modify some of the fields on this page if necessary.
Object Name	HP_FT_SURVEY_PNL2
Navigation	**Develop Workforce, Manage Faculty Events, Use, FT Academic Teaching Surveys, FT Teaching Survey Part 2**
Prerequisites	Load Teaching Survey Data -FT Survey page
Access Requirements	Enter an Employee ID.



FT Academic Teaching Surveys - FT Survey Part 2 page

Stats-Can Rank (Statistics Canada Rank)

The **Stats-Can Rank** field displays the Statistics Canada rank (defined on the Academic Rank page) as determined by the Academic Rank indicated on the Job Code Table.

Stats-Can Responsibility (Statistics Canada Responsibility)

The **Stats-Can Responsibility** field displays the Statistics Canada Responsibility (defined on the Administrative Post page) as determined by the duties indicated on the Statistics Canada Academic Teaching Employment Table on the Employment Data - Employment Information page.

Year of Appointment to Rank

Displays the first year the employee achieved the reported rank. If there has been a year or more when the employee wasn't reported then this field displays the first year reporting resumed for this employee.

Medical/Dental Category

Displays the **Medical/Dental Category** associated with this employee's faculty code.

Type of Appointment

Displays the **Type of Appointment**. **Type of Appointment** is determined using information from the Visiting Faculty field on the Member Data page and the Tenure Status field on the Tenure Data table.

Salary Earned

Actual Salary

The system calculates the **Actual Salary** using compensation and Job Earnings Distribution information from the reporting year. The system calculates **Actual Salary** taking into account contracts, leaves, reduced workloads, and salaries for multiple jobs identified as Collapse as FT on the Statistics Canada Academic Teaching Employment Table (on the Employment Data - Employment Information page).

The system doesn't include any administrative stipends or salary increases effective after October first of the reporting year.

The system uses decimal months to calculate **Actual Salary**. This may result in figures that are skewed. You can modify the **Actual Salary** on this page if required.

Annual Salary

If the employee hasn't had a reduced workload and has been working for the entire 12 months of the reporting year the Annual Salary will be the same as the **Actual Salary.**

The system doesn't include any administrative stipends or salary increases effective after October first of the reporting year.

Salary Status

Displays the **Salary Status** from the Member Data page.

Administrative Stipends

The system displays the amount paid for stipends and honoraria for administrative duties for the reporting year. The system uses Job Earnings Distribution records to calculate **Administrative Stipends**.

The system uses decimal months to calculate **Administrative Stipends** for the reporting year. This may result in figures that are skewed. You can modify the **Administrative Stipends** field on this page if required.

Ontario Final Rate of Salary

For Ontario based institutions, the system calculates the final rate of salary using the **Annual Salary** and **Administrative Stipends**.

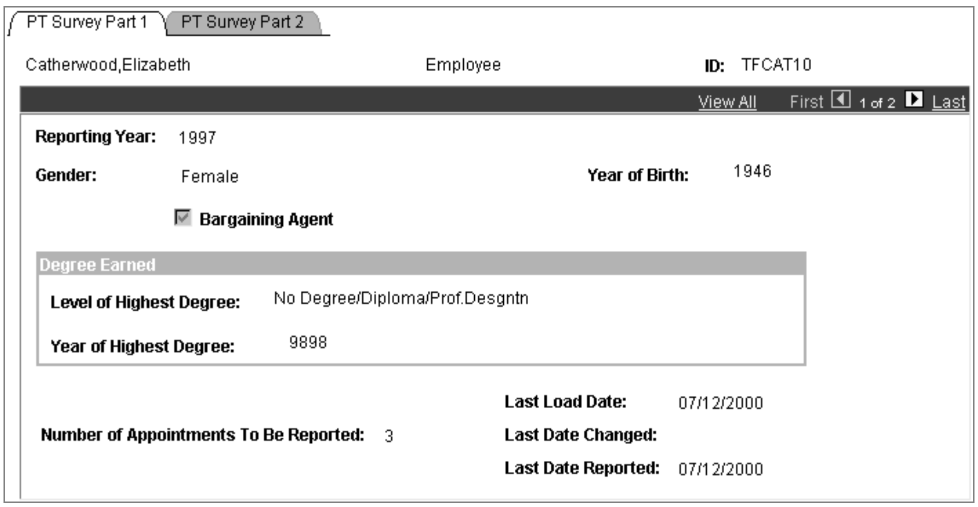
Ontario Salary Source

For Ontario based institutions, the system calculates the salary source using the Job Earnings Distribution amounts distributed to non-operational funding accounts, excluding administrative stipend amounts.

Percentage of Load Reduction	If the employee has been on reduced workload the system calculates the percentage by which workload has been reduced using the standard hours from the Job Data table and the standard hours on the Job Code table. The system calculates **Percentage of Load Reduction** using this formula: (Standard Hours on the Job Data table / Standard Hours from the Job Code Table) * (number of decimal months on reduced workload / number of decimal months in appointment).
Months Not On Leave	The system displays the number of months that the employee wasn't on leave during the reporting year.
Months On Sabbatical	The system displays the number of months that the employee was on sabbatical leave during the reporting year. The system determines **Months On Sabbatical** from the Action/Reason field on the Job Data table using the HR Action/Category you specified on the Reporting Period Table page.
Months On Other Paid Leave	The system displays the number of months that the employee was on other paid leave during the reporting year. The system determines **Months On Other Paid Leave** from the Action/Reason field on the Job Data table using the HR Action/Category you specified on the Reporting Period Table page.
Months On Unpaid Leave	The system displays the number of months that the employee was on unpaid leave during the reporting year. The system determines **Months On Unpaid Leave** from the Action/Reason field on the Job Data table using the HR Action/Category you specified on the Reporting Period Table page.
Total Months	Displays the total number of months of the **Months Not On Leave**, **Months On Sabbatical**, **Months On Other Paid Leave**, and **Months On Unpaid Leave.** The **Total Months** value will be twelve.
Last Load Date	Displays the date of the last time the teaching survey data was loaded.
Last Date Changed	Displays the date of the last time this page was modified.
Last Date Reported	Displays the date of the last time this employee's teaching survey data was reported.

PT Academic Teaching Surveys – PT Survey Part 1 Page

Usage	Use the PT Academic Teaching Surveys - PT Survey Part 1page to view the results of the Academic Teaching surveys for each part-time employee.
Object Name	HP_PT_SURVEY_PNL1
Navigation	**Develop Workforce, Manage Faculty Events, Use, PT Academic Teaching Surveys, PT Teaching Survey Part 1**
Prerequisites	Load Teaching Survey Data -PT Survey page
Access Requirements	Enter an Employee ID.



PT Academic Teaching Surveys – PT Survey Part I page

The following elements are common to multiple pages and are defined at the front of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Gender** and **Year of Birth.** The values for these elements are determined on the Personal Data table.

Reporting Year Displays the **Reporting Year**. Reporting periods are defined on the Reporting Period Table page.

Bargaining Agent Displays whether or not the employee is a **Bargaining Agent**.

Degree Earned

Level of Highest Degree Displays the Statistics Canada degree level defined on the Professional Ed. and Training page.

Year of Highest Degree Displays the year the employee received their highest degree.

Number of Appointments To Be Reported Displays the total number of part-time positions held in the last year. Only the five with longest duration will be reported in detail in the Academic Teaching Survey report.

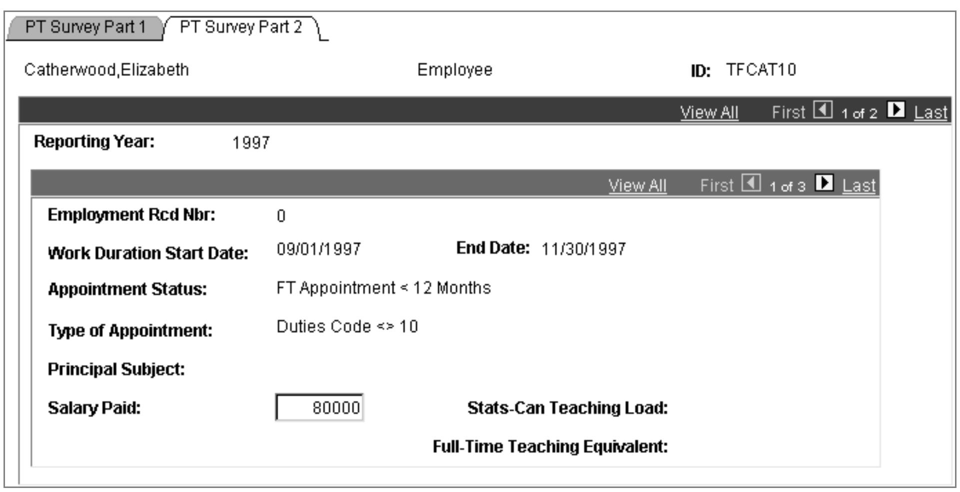
Last Load Date Displays the date of the last time the teaching survey data was loaded.

Last Date Changed Displays the date of the last time this page was modified.

Last Date Reported Displays the date of the last time this employee's teaching survey data was reported.

PT Academic Teaching Surveys – PT Survey Part 2 Page

Usage	Use the PT Teaching Survey Part 2 to view the results of the Academic Teaching surveys for each part-time employee.
Object Name	HP_PT_APPNTMNT_PNL
Navigation	**Develop Workforce, Manage Faculty Events, Use, PT Academic Teaching Surveys, PT Teaching Survey Part 2**
Prerequisites	Load Teaching Survey Data -PT Survey page
Access Requirements	Enter an Employee ID.



PT Academic Teaching Surveys – PT Survey Part 2 page

Employment Rcd Nbr (Employment Record Number) Displays the employee's employment record number being reported.

Work Duration Start Date

If the job compensation frequency is contract, the system will display the contract effective date that is maintained on the Contract Data page.

If the job isn't contract the date of the employment hire or re-hire (if the same employment record is used for successive appointments) date is displayed. This information is maintained on the Job Data table.

End Date

If the job compensation frequency is contract, the system will display the contract end date that is maintained on the Contract Data page.

If the job isn't contract the date of the employment termination date or the Appointment end date is displayed. This information is maintained on the Job Data table.

Appointment Status

Displays the employee's **Appointment Status**. The system derives **Appointment Status** from the Job Data table. Possible **Appointment Status** values are:

1 - Full-Time appointment working less than 12 months within the reporting period.

2 - Part-Time appointment

3 - Overload appointment of less than 12 months where the employee was also reported in the Full-Time Academic Teaching Survey for the same reporting year as the Part-Time.

Type of Appointment

The system displays the **Type of Appointment** as derived from tenure status indicated on the Tenure Data page and Duties indicated on the Statistics Canada Academic Teaching Employment Table on the Employment Data - Employment Information page.

Principal Subject

Displays the **Principal Subject t**aught by the employee that is maintained on the Statistics Canada Academic Teaching Employment Table on the Employment Data - Employment Information page. The system displays the **Principal Subject** taught as of the **End Date** of the appointment.

Salary Paid

The system calculates the **Salary Paid** using compensation and Job Earnings Distribution information from the reporting year. The system calculates **Salary** taking into account contracts, leaves, and reduced workloads.

The system uses decimal months to calculate **Salary Paid**. This may result in figures that are skewed. You can modify the **Salary Paid** on this page if required.

Stats Can Teaching Load (Statistics Canada Teaching Load)

The system displays the employee's **Stats Can Teaching Load** that is maintained on the Statistics Canada Academic Teaching Employment Table on the Employment Data - Employment Information page.

Full-Time Teaching Equivalent

The system displays the employee's **Full-Time Teaching Equivalent** that is maintained on the Statistics Canada Academic Teaching Employment Table on the Employment Data - Employment Information page.

Creating the Academic Teaching Survey Flat Files

Use the pages in the Create Stats-Canada Survey component to create the Full-time and Part-time Academic Teaching Reporting Files that you will submit to Statistics Canada from the full and part-time Academic Teaching Survey tables.

Standard Element Definitions for the Create Stats-Canada Survey Component

Reporting Period

Displays the year of the data that will be loaded into the FT and PT Academic Teaching Survey flat files. **Reporting Periods** are defined on the Reporting Period Table page.

Start Date

Displays the start of the employment year that was used to assess twelve months of employment and compensation amounts. **Start Date** is defined on the Reporting Period Page.

End Date

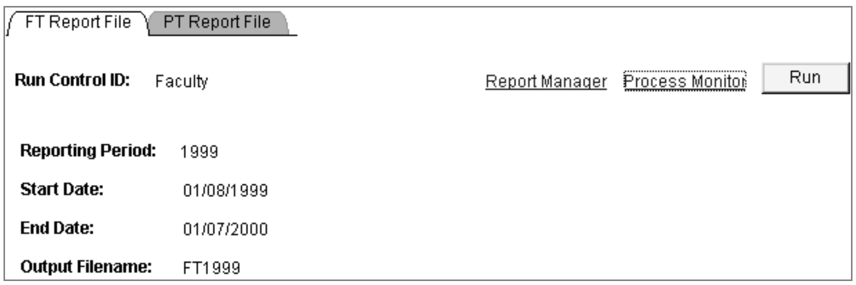
Displays the end of the employment year that was used to assess twelve months of employment and compensation amounts. The **End Date** is calculated by the system based on the **Start Date** and is one year less a day from the **Start Date**.

Output File Name

Displays the **Output File Name** of the Canada Academic Teaching Survey flat file, as defined on the Reporting Period Table page.

Create Stats-Canada Survey – FT Report File Page

Usage	Use the Create Stats-Canada Survey - FT Report File page to create the Full-Time Academic Teaching report flat file.
Object Name	RUNCTL_HPH903CN
Navigation	**Develop Workforce, Manage Faculty Events, Process, Create Stats-Canada Survey, FT Report File**
Prerequisites	Load Teaching Survey Data page and modifications, if required, to the FT Teaching Survey Part 2.
Access Requirements	Enter a Run Control ID.

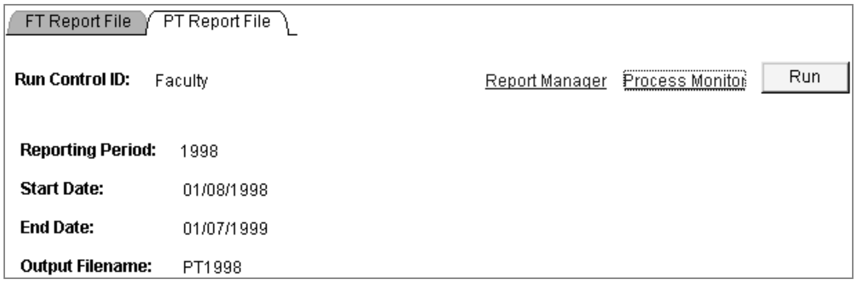


Create Stats-Canada Survey – FT Report File page

The following elements are common to multiple pages in this component and are defined at the front of this section in Standard Element Definitions for the Create Stats-Canada Survey Component: **Reporting Period, Start Date, End Date,** and **Output File Name.**

Create Stats-Canada Survey - PT Report File Page

Usage	Use the Create Stats-Canada Survey - PT Report File page to create the Part-Time Academic Teaching report flat file.
Object Name	RUNCTL_HPH903CN
Navigation	**Develop Workforce, Manage Faculty Events, Process, Create Stats-Canada Survey, FT Report File**
Prerequisites	Load Teaching Survey Data page and modifications, if required, to the PT Teaching Survey Part 2.
Access Requirements	Enter a Run Control ID.



Create Stats-Canada Survey - PT Report File page

The following elements are common to multiple pages in this component and are defined at the front of this section in Standard Element Definitions for the Create Stats-Canada Survey Component: **Reporting Period, Start Date, End Date,** and **Output File Name.**

Verifying Statistics Canada Academic Teaching Survey Results

After you have submitted your full-time and part-time Academic Teaching Surveys to Statistics Canada you will receive a summary report. Use the StatsCan FT Survey Report to compare your results with Statistics Canada's summary.

The report consists of four pages, each page reporting full-time survey salary calculations based on different selection criteria:

- Full-Time Staff Salaries - Including Admin Posts and Medical/Dental
- Full-Time Staff Salaries - Including Admin Posts , Excluding Medical/Dental
- Full-Time Staff Salaries - Excluding Senior Admin Duties, Including Medical/Dental
- Full-Time Staff Salaries - Excluding Senior Admin Duties and Medical/Dental

CHAPTER 5

Running Tracking Faculty Events Reports

This chapter explains how to generate PeopleSoft Tracking Faculty Events reports and details the output results of those reports. Tracking Faculty Events reports provide information designed to help Higher Education organizations manage their faculty resources.

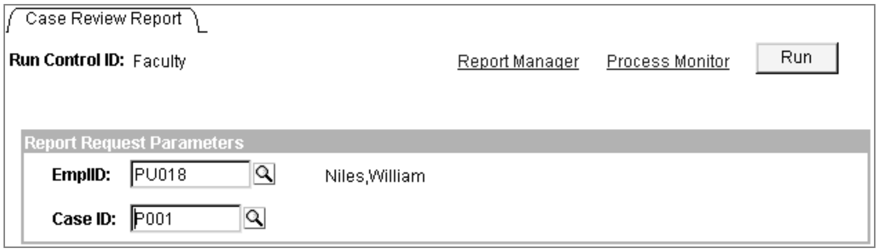
For more information on generating these reports see Introduction to PeopleSoft Reporting. **For a complete alphabetical listing** of all PeopleSoft HRMS reports see List of Reports in PeopleSoft Human Resources.

Generating the Case Review Status Report

The Case Review Status report captures the case review details and the less secure aspects of the case review path details for an employee's tenure case.

Case Review Report Page

Usage	Use the Case Review Status page to run the Case Review Status report.
Object Name	RUNCTL_CASE_REVIEW
Navigation	**Develop Workforce, Manage Faculty Events, Report, Case Review Status, Case Review Report**
Prerequisites	The employee you are reporting on must have a Case ID.
Access Requirements	Enter a Run Control ID.



Case Review Report page

EmplID	Select the employee ID of the employee you want to report on.
Case ID	Select the employee's **Case ID** that you want to report on.

Click **Run** to run the report using Process Scheduler.

For more information about Process Scheduler, see Process Scheduler.

Case Review Status Report Details

Description	The Case Review Status reports the case review details and the less secure aspects of the case review path details for an employee's case.
Report ID	PER046
Type of Report	SQR
Parameters	EmplID, Case ID
Source	RUNCTL_CASE_REVIEW
Source Records	EG_EMPL_TENURE, JOB_DATA, EG_CASE_REVIEW, EG_ REVIEW_DATA
Sorted By	None

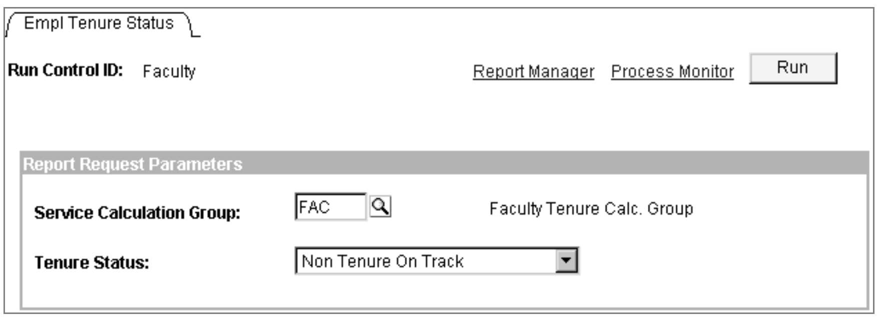
For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation or the PeopleSoft HRMS Reporting Tools.

Generating the Employee Tenure Status Report

The Employee Tenure Status report lists employee tenure status and home department information. You can select by calculation group and tenure status.

Empl Tenure Status Page

Usage	Use the Empl Tenure Status page to run an Employee Tenure Status report.
Object Name	RUNCTL_EGPP03
Navigation	**Develop Workforce, Manage Faculty Events, Report, Employee Tenure Status, Empl Tenure Status**
Access Requirements	Enter a Run Control ID.



Empl Tenure Status page

Service Calculation Group Select the **Service Calculation Group** of the employees you want to report on.

Tenure Status Select the **Tenure Status** of the employees in this **Service Calculation Group** that you want to report on.

Click **Run** to run the report using Process Scheduler.

For more information about Process Scheduler, see Process Scheduler.

Employee Tenure Status Report Details

Description	This report lists employee tenure status and home department information. You can select by calculation group and tenure status.

Report ID	PER047
Type of Report	SQR
Parameters	Service Calculation Group (or all), Tenure Status (or all)
Source	RUNCTL_EGPP03
Source Records	EG_EMPL_TENURE, JOB_DATA
Sorted By	Service Calc Group, Tenure Status, Employee Name

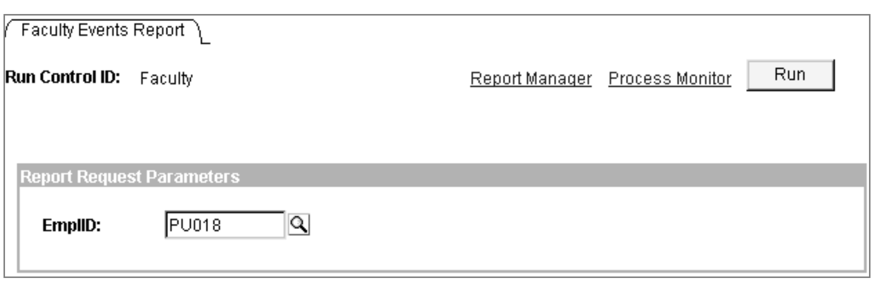
For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation or the PeopleSoft HRMS Reporting Tools.

Generating the Faculty Events History Report

This report lists all the tracking events for the employee requested. Tracking events includes all events such as activities, administrative Posts/Appointments/Titles, education and training, honors and awards, and memberships. This report may be used as a template for Curriculum Vitae reporting.

Faculty Events Report Page

Usage	Use the Faculty Events History page to run a Faculty Events History report.
Object Name	RUNCTL_EVENTS
Navigation	**Develop Workforce, Manage Faculty Events, Report, Faculty Events History, Faculty Events Report**
Access Requirements	Enter a Run Control ID.



Faculty Events Report

EmplID	Enter the employee ID of the employee you would like to report on.

Click **Run** to run the report using Process Scheduler.

For more information about Process Scheduler, see Process Scheduler.

Faculty Events History Report Details

Description	This report lists all the tracking events for the employee requested. Tracking events includes all events such as activities, administrative Posts/Appointments/Titles, education and training, honors and awards, and memberships. This report may be used as a template for Curriculum Vitae reporting.
Report ID	PER045
Type of Report	SQR
Parameters	EmplID
Source	RUNCTL_EVENTS
Source Records	EG_EMPL_TENURE, JOB_DATA, EG_ACTIVITIES, EG_ADMIN_POSTS, SCHOOL_EDUCATION, EDUCAT_TRAIN_GBL, EG_HONORS_AWARDS, LICENSES_CERTIFS, MEMBERSHIPS, EG_PRESENTATIONS, PUBLICATIONS, EG_SPECIAL_PROJECT, EG_ADVISEMENT, EG_TEACHING_RESP
Sorted By	None

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 Statistics Canada Full Time Survey Report

After you have submitted your full-time and part-time Academic Teaching Surveys to Statistics Canada you will receive a summary report from Statistics Canada. Use the StatsCan FT Survey Report to compare your results with Statistics Canada's summary.

The report consists of four pages; each page reporting full-time survey salary calculations based on different selection criteria:

- Full-Time Staff Salaries - Including Admin Posts and Medical/Dental
- Full-Time Staff Salaries - Including Admin Posts , Excluding Medical/Dental
- Full-Time Staff Salaries - Excluding Senior Admin Duties, Including Medical/Dental
- Full-Time Staff Salaries - Excluding Senior Admin Duties and Medical/Dental

StatsCan FT Survey Report Page

Usage	Use the StatsCan FT Survey Report page to generate a Statistics Canada Full Time Survey report.
Object Name	RUNCTL_HPH905CN
Navigation	**Develop Workforce, Manage Faculty Events, Report, StatsCan FT Survey Report, StatsCan FT Survey Report**
Prerequisites	You must have processed full-time Academic Teaching Surveys using the Create Stats-Canada Survey component.
Access Requirements	Enter the Run Control ID used in the Create Stats-Canada Survey component when you created the full-time Academic Teaching Survey that you now want to report on.

StatsCan FT Survey Report page

This report is based on the Statistics Canada Academic Teaching Survey report files you created and submitted to Statistics Canada using the Stats-Canada Survey component.

Reporting Period The system will display the **Reporting Period** of the full time Academic Teaching Survey that matches the **Run Control ID** you entered.

Start Date The system will display the **Start Date** of the full time Academic Teaching Survey that matches the **Run Control ID** you entered.

End Date	The system will display the **End Date** of the full time Academic Teaching Survey that matches the **Run Control ID** you entered.

Click **Run** to run the report using Process Scheduler.

For more information about Process Scheduler, see Process Scheduler.

Statistics Canada Full Time Survey Report Details

Description	After you have submitted your full-time and part-time Academic Teaching Surveys to Statistics Canada you will receive a summary report. Use the StatsCan FT Survey Report to compare your results with Statistics Canada's summary.
Report ID	HRH905CN
Type of Report	SQR
Parameters	Reporting Period. These dates are set up on the Reporting Period Table page.
Source	RUNCTL_HRH905CN
Source Records	PS_HP_FT_SURVEY
Sorted By	Academic Rank

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.

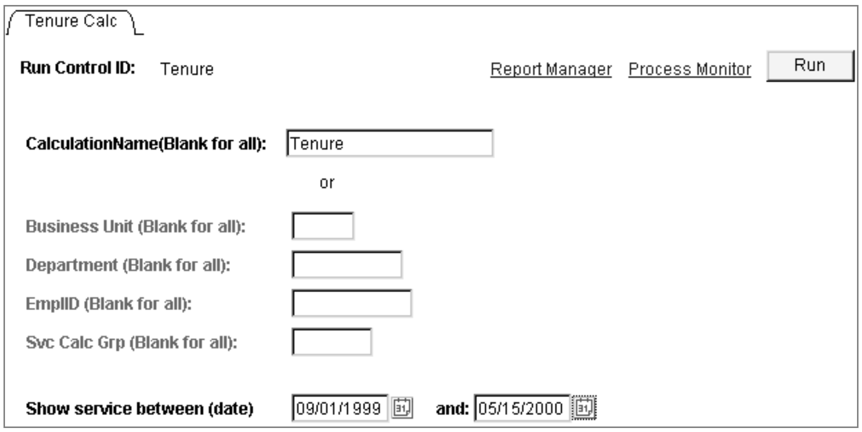
Generating the Tenure Calculation Report

The Tenure Calculation report lists the calculated service information in the temporary calculation file created from a calculation run, such as Normal Run.

Tenure Calc Page

Usage	Use the Tenure Calc page to run the Tenure Calculation report. Administer Flexible Service also uses this report.

Object Name	RUNCTL_EGPP05
Navigation	• **Administer Workforce, Administer Flexible Service, Reports, Service Calc Report, Service Calc Report** • **Develop Workforce, Manage Faculty Events, Report, Tenure Calc. Report, Tenure Calc Rpt.**
Prerequisites	You must have run the Tenure Calc process at least once.
Access Requirements	Enter the Run Control ID of the Tenure Calc process information you are reporting on.



Tenure Calc page

Run Control ID

Enter the **Run Control ID** of the Tenure Calc process you are reporting on.

CalculationName (Blank for all):

Based on the **Run Control ID** you entered, the system will default the calculation name that was processed in the Tenure Calc process. Leave this field blank to include all Calculation Names in the report.

Business Unit (Blank for all):

Based on the **Run Control ID** you entered, the system will default the business unit that was processed in the Tenure Calc process. Leave this field blank to include all **Business Units** in the report.

Department (Blank for all):

Based on the **Run Control ID** you entered, the system will default the department that was processed in the Tenure Calc process. Leave this field blank to include all **Departments** in the report.

EmplID (Blank for all):

Based on the **Run Control ID** you entered, the system will default the EmplID that was processed in the Tenure Calc process. Leave this field blank to include all employees in the report.

Svc Calc Grp (service calculation group) **(Blank for all):**	Based on the **Run Control ID** you entered, the system will default the service calculation group that was processed in the Tenure Calc process. Leave this field blank to include all service calculation groups in the report.
Show service between (date):	Select the begin date of the period for which you want to see service credits reported.
And:	Select the end date of the period for which you want to see service credits reported.

Click **Run** to run the report using Process Scheduler.

For more information about Process Scheduler, see Process Scheduler.

Tenure Calculation Report Details

Description	This report lists the calculated service information in the temporary calculation file created from a calculation run, such as ***Normal Run***.
Report ID	PER050
Type of Report	SQR
Parameters	There are two ways to drive this report: 1. By selecting a Calculation Name (or all) 2. By selecting a Business Unit (or all), Department (or all), EmplID (or all), Service Calc Group (or all). When you enter a Run Control ID the system will use the information used in the Tenure Calc process with the same Run Control ID. With either approach, you must also specify from/to dates for reporting service credits.
Source	RUNCTL_EGPP05
Source Records	EG_SVC_HIST, JOB_DATA
Sorted By	Service Calc Group, Department, Emplid, Service Interval

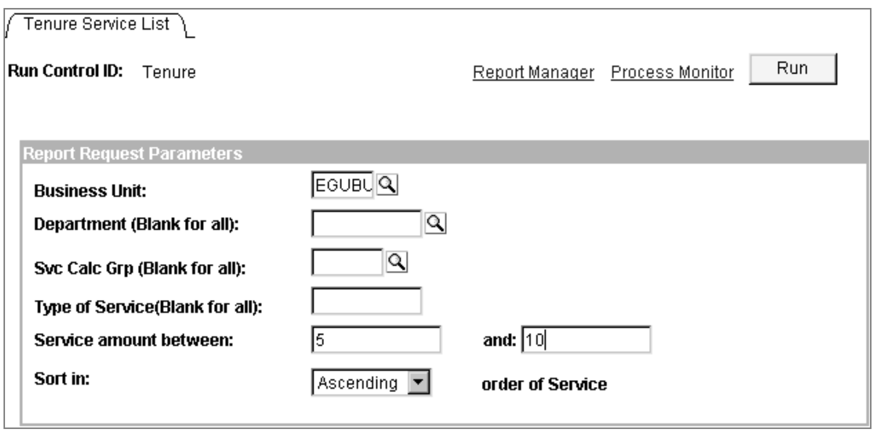
For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation or the PeopleSoft HRMS Reporting Tools.

Generating the Tenure Years of Service Report

The Tenure Years of Service report provides detailed tenure service information for employees. Information includes home department, tenure status, track start date, and accrued service. Using this report you can list employees by Calculation Group and within specified tenure service accruals between x and y years. You can also sort by ascending or descending service time.

Tenure Service List Page

Usage	Use the Tenure Service List page to generate a Tenure Years of Service report.
Object Name	RUNCTL_EGPP06
Navigation	**Develop Workforce, Manage Faculty Events, Report, Tenure Yrs of Service Report, Tenure Service List**
Access Requirements	Enter a Run Control ID.



Tenure Service List report page

After service is committed to history (following the *Update to History* run), information will be purged from the temporary file. If you try running the report for the calculation group you've just updated to history, you won't get any output.

Business Unit Select the **Business Unit** of the employees whose tenure service you'd like to report on.

Department (Blank for all) Select the **Department** of the employees whose tenure service you'd like to report on. Leave this field blank to include employees of all departments in the report.

Svc Calc Grp (service calculation group) **(Blank for all)**	Select the service calculation group of the employees whose tenure service you'd like to report on. Leave this field blank to include employees of all service calculation groups in the report.
Type of Service (Blank for all)	Select the **Type of Service** of the employees whose tenure service you'd like to report on. Leave this field blank to include employees of all types of service in the report.
Service amount between	Enter the beginning amount of tenure service years being reported.
And	Enter the cutoff number of tenure service years being reported.
Sort in	Select the order in which you'd like the report to sort the information.

Click **Run** to run the report using Process Scheduler.

For more information about Process Scheduler, see Process Scheduler.

Tenure Years of Service Report Details

Description	This report provides detailed tenure service information for employees. Information includes home department, tenure status, track start date, and accrued service. Using this report you can list employees by Calculation Group and within specified tenure service accruals between x and y years. You can also sort by ascending or descending service time.
Report ID	PER051
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 x and y), Sort Descending or Sort Ascending, (for Service Amount).
Source	RUNCTL_EGPP06
Source Records	EG_EMPL_TENURE, JOB_DATA, EG_PRIOR_EXP
Sorted By	Service Calc Group, Department (Tenure Home Department), Tenure Service (ascending or descending as specified).

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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