



PeopleSoft 8.3 Human Resources PeopleBook: Track Faculty Events

PeopleSoft 8.3 Human Resources PeopleBook: Track Faculty EventsEnter The Title in the Properties Dialog Box

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PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

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About the HRMS PeopleBooks

The HRMS PeopleBooks provide you with the information you will need for implementing and using PeopleSoft Human Resources Management System (HRMS) products.

This section describes information you should know before you begin working with PeopleSoft products and documentation, including PeopleSoft-specific documentation conventions, information specific to the PeopleSoft HRMS product line, how to order additional copies of our documentation, and so on.

Before You Begin

To benefit fully from the information covered in these books, you need to have a basic understanding of how to use PeopleSoft applications. We recommend that you complete at least one PeopleSoft introductory training course.

You should be familiar with navigating around the system and adding, updating, and deleting information using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft® Windows or Windows NT graphical user interface.

Because we assume you already know how to navigate the PeopleSoft system, much of the information in these books is not procedural. That is, it does not typically provide step-by-step instructions on using tables, pages, and menus. Instead, we provide you with all the information you need to use the system most effectively and to implement your PeopleSoft application according to your organizational or departmental needs. These books expand on the material covered in PeopleSoft training classes.

PeopleSoft Application Fundamentals for HRMS PeopleBook

The individual HRMS PeopleBooks provide you with implementation and processing information for the individual HRMS products. However, there is additional, essential information describing the setup and design of each HRMS product contained in the companion volume of documentation called *PeopleSoft Application Fundamentals for HRMS PeopleBook*.

The *PeopleSoft Application Fundamentals for HRMS PeopleBook* consists of important topics that apply to many or all PeopleSoft applications across the HRMS product line. Whether you are implementing a single HRMS product, some combination of products within the product line, or the entire PeopleSoft HRMS system, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals such as setting up control tables and administering security.

In the *PeopleSoft Applications Fundamentals for HRMS PeopleBook*, we've included common information pertinent to all applications in the HRMS product line, such as defining general options. If you're upgrading from a previous PeopleSoft release, you may notice that we've

removed some topics or topic headings from the individual application PeopleBooks and consolidated them in this single reference book. You'll now find only application-specific information in your individual application PeopleBooks. This makes the documentation as a whole less redundant. Throughout each PeopleBook, we provide cross-references to *PeopleSoft Application Fundamentals for HRMS* and other PeopleBooks.

Related Documentation

To add to your knowledge of PeopleSoft applications and tools, you may want to refer to the documentation of other PeopleSoft applications. You can access additional documentation for this release from PeopleSoft Customer Connection (www4.peoplesoft.com/cc). We post updates, troubleshooting documentation, and other items on Customer Connection, as well. In addition, documentation for this release is available on CD-ROM and in hard copy.

Important! Before upgrading, it is *imperative* that you check PeopleSoft Customer Connection for updates to the upgrade instructions. We continually post updates as we refine the upgrade process.

Documentation on the Internet

You can order printed, bound versions of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM. You can order additional copies of the PeopleBooks CDs through the Documentation section of the PeopleSoft Customer Connection Web site: <http://www4.peoplesoft.com/cc>

You'll also find updates to the documentation for this and previous releases on Customer Connection. Through the Documentation section of Customer Connection, you can download files to add to your PeopleBook library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation delivered on your PeopleBooks CD.

Documentation on CD-ROM

Complete documentation for this release is provided on the CD-ROM *PeopleSoft 8.3 HRMS PeopleBooks*, SKU HR83PBR0, and *PeopleTools 8.14 PeopleBooks*, SKU PTB814R0.

Note. Your access to PeopleSoft PeopleBooks depends on which PeopleSoft applications you've licensed. You may not have access to some of the PeopleBooks listed here.

Hardcopy Documentation

To order printed, bound volumes of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM, visit the PeopleSoft Press Web site from the Documentation section

of PeopleSoft Customer Connection. The PeopleSoft Press Web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), our book print vendor.

We make printed documentation for each major release available shortly after the software is first shipped. Customers and partners can order printed PeopleSoft documentation using any of the following methods:

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Telephone	Contact Consolidated Publishing Incorporated (CPI) at 800 888 3559 .
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PeopleBooks Standard Page Element Definitions

Throughout our product documentation, you will encounter fields that are used on many application pages or panels. This section lists the most common fields and provides standard definitions.

Field	Definition
Address 1, Address 2, Address 3	Freeflow text entry fields that enable you to describe street, street number, apartment number, and other address information.
As of Date	The last date for which a report or process includes data.
Block (Bloque)	In Spanish addresses, a building or buildings that are close together may be called a Block (Bloque). Include the Block name in the address, if necessary.
Business Unit	An identification code that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
City	Name of city for address.
Comment(s)	Freeflow text entry that enables you to add comments.
Company	A business organization. For US companies using PeopleSoft Payroll for North America or PeopleSoft Pension Administration, a business unit that has a unique federal Employer Identification Number (EIN) for payroll reporting purposes.

Field	Definition
Country	Country for address. Other address fields will be adjusted to reflect Country choice. Select a country from the list of valid values and press TAB to move through the field. The system automatically displays the appropriate address fields using the standardized address formats previously set up in the Country Table. Enter the appropriate address data in the fields that appear.
County (also Prefecture and Parish)	Name of county (prefecture/parish) for address, if applicable.
Currency Code	The 3-letter code in which the currency is specified.
Description	Freeflow text up to 36 characters that describes what you are defining.
Department	An identification code that represents an organization in a company.
Door (Puerta)	In Spanish addresses, identifies the door name or number.
Effective Date	Date on which a table row becomes effective; the date that an action begins. For example, if you want to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
Email	The email address for a person or organization.
EmplID (employee ID)	Unique identification code for an individual associated with your organization.
Empl Rcd# (Employee Record Number)	A system-assigned number that indicate an employee has more than one record in the system.
Fax (also Fax Number)	The fax number for a person or organization.
Floor (Piso)	In Spanish addresses, identifies the floor name or number.
House	Identifies the type of house.
Initials	Initials of individual.
Language	Language spoken by employee/applicant/non-employee.
Language or Language Code	The language in which you want the field labels and report headings of your reports to print. The field values appear as you enter them. Language also refers to the language spoken by an employee, applicant, or non-employee.
Last Run On	The date that a report or process was last run.
Locality	A tax location within an organization.
Name	Name of individual.

Field	Definition
National ID	Identification code used by countries to track information on their residents for payroll, identification, benefits, and other purposes. For example, for US residents this would be their Social Security Number; for German residents it would be their Social Insurance Number, and for UK residents it would be their National Insurance Code.
Number	The number related to a street, avenue, or other address field in Spanish addresses. When an address has no number, enter s/n (sin numero) to indicate that there is no number.
Phone	The phone number for a person or organization.
Phone Extension	The phone extension number for a person or organization.
Phone Type	Identifies the type of phone number entered in the Telephone field. Valid values are Business , Campus , Cellular , Dormitory , FAX , Home , Other , Pager 1 , Pager 2 , or Telex .
Post Code (also Postal)	Postal code for address.
Prefix	Prefix for individual (such as Mr., Ms., Mrs., Dr., and so on)
Process Frequency group box	Designates the appropriate frequency in the Process Frequency group box: Once executes the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run . Always executes the request every time the batch process runs. Don't Run ignores the request when the batch process runs.
Process Monitor	This button takes you to the Process List page, where you can view the status of submitted process requests.
Regulatory Region	A regulatory region can be any region where there are specific laws and regulations that are addressed by functionality in PeopleSoft Human Resources. Many country-specific transactions are driven by regulatory requirements where Regulatory Region is used for transaction processing.
Report ID	Identifies a report.
Report Manager	This button takes you to the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Request ID	A request identification that represents a set of selection criteria for a report or process.
Run	This button takes you to the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.

Field	Definition
Run Control ID	Identifies specific run control settings for a panel.
Run Date	The date that a process was run or a report was generated.
Run Time	The time that a process was run or a report was generated.
SetID	An identification code that represents a set of control table information. SetIds enable the sharing of a set of control table information across two or more Business Units.
Short Description	Freeflow text up to 15 characters.
Stair (Escalera)	In Spanish addresses, identifies the stair name or number.
State (also Province)	State (Province) for address.
Status	Indicates whether a row in a table is <i>Active</i> or <i>Inactive</i> .
Street Type	Identifies whether an address is a place, street, avenue, road, or so on. Spanish law requires addresses in official documents to include the Street Type.
Telephone (Phone)	The telephone number for a person or organization.
User ID	The system identifier for the individual who generates a transaction.

See Also

PeopleTools Development Tools: Application Designer PeopleBook, “Creating Field Definitions,” Understanding Effective Dates

PeopleSoft Process Scheduler

PeopleBook Standard Group Boxes

The following group boxes and field groupings appear throughout PeopleSoft HRMS. We have documented them once here.

Entering Name Information

The following fields appear wherever you enter or display naming information:

Format Using

Select the country with name format appropriate for this employee. The system will display the appropriate fields for this format in the Person Name group box.

Refresh the Name Field

Click to refresh the Name field after you’ve edited any of the name fields. The system will refresh the name field when you save.

Person Name or Current Name

The following fields appear in the Person Name group box. You will not see all of the fields listed below at any one time. The system displays the fields necessary for the country you select in the Format Using field.

Title	Select a title. If you are reporting employee information under the German Duevo Directive, this field is required and must be completed according to the Duevo rules.
Prefix and Name Prefix	Select a Prefix or Name Prefix, if applicable.
Royal Prefix	Select a Royal Prefix, if applicable.
First Name	Enter the employee's official first name.
Preferred First Name	For The Netherlands, enter the employee's preferred first name, if different from the First Name. The system will use the preferred name when you generate form letters or mailing labels for this employee.
Last Name Preference	For the Netherlands, choose this link to provide additional name information for married employees. The Last Name Preference page contains three fields: Last Name Partner, Prefix Partner and Last Name Preference.
Middle	Enter the employee's middle name, if applicable.
Last Name	Enter the employee's official last name.
Suffix	Select a suffix, if applicable.
Second Last Name	For Spanish employees, enter the second surname (mother's surname).
Alternate Character Name	Use this field to enter the employee's name using alternate characters (such as Japanese phonetic characters). Note. You can enter names using Japanese characters with or without a space between the surname and given name. Names using Roman alphanumeric characters require a comma delimiter. Warning! Be sure to select the correct character set on the Installation Table – Alternate Characters page. Using the wrong character set generates an error message.
Royal Suffix	Select the appropriate royal suffix. If you are reporting employee information under the German Duevo Directive, this field is required and must be completed according to the Duevo rules.
Name	The system displays the employee's name as it will appear in the system.

Displaying Japanese Names on Pages

Pages that display personal name fields usually display them in First Name, Last Name order. When the country is Japan, however (JPN in the Format Using field), those fields appear in the Last Name, First Name order.

Another difference is that the Name field displays “Last Name[space]First Name,” not “Last Name,First Name”; that is, a space separates the last and first names, not a comma.

Person Name

Last:

津村

First:

友則

Alternate Character Name:

ツムラトモリ

Name:

津村 友則

Japanese name format on a page

See Also

PeopleSoft Applications Fundamentals for HRMS PeopleBook, “Setting Up PeopleSoft HRMS,” Working With Double-Byte Characters

Entering Address Information

The following fields appear in address group boxes throughout PeopleSoft HRMS. You may not see all of the fields listed below as the system displays only the fields necessary for the country in use. Determine which address fields are required for each country on the Country Table – Address Format page.

Country	Select the country with address format appropriate for this address. The system will display the appropriate fields for this format in the address group box.
Address 1, Address 2, Address 3, and Address 4	Freeflow text entry fields that enable you to describe street, street number, apartment number, and other address information.
City	Enter the city.
County	Enter the county, if applicable.
State (State, Province, or other)	Enter the state or province.
Postal	Enter the postal, such as zip or postal code.
Number 1, and Number 2	Enter the number related to a street, avenue, or other address field in Spanish addresses. When an address has no number, enter s/n (sin numero) to indicate that there is no number.

House Type	Enter the house type, if applicable.
Postal Search	Click Postal Search to use international address formats.

Entering or Viewing Pay Components

Amounts Tab

Pay Components - Amounts

Rate Code	Rate codes are IDs for pay components. The system inserts any compensation information associated with this rate code in the compensation grid. Note. If a seniority rate code is inserted as a default value on the Job Data - Compensation page, the values for these rate codes are unavailable for entry.
Seq (sequence)	The sequence number of the rate code if it is used more than once.
Details	Click the Details button to open the Comp Rate Code Secondary Panel page.
Comp Rate , (compensation rate) Currency , and Frequency	The compensation rate, its currency, and the frequency (for example, annually, weekly, or hourly) the comp rate will be paid.
Apply FTE	If selected, the system multiplies the rate code value by the FTE factor for annualization and deannualization. FTE is the percent of full time the employee should normally work in the corresponding job. This field isn't available for Percent rate codes.
Points	The salary points associated with this rate code, if any.
Percent	If the rate code rate type is Percent , the system displays the percent to be applied to the job compensation rate or to a rate code group if you are using rate code groups.
Rate Code Group	A rate code group enables you to be more specific when calculating percentages based components as part of your employee compensation package.

Comp Rate Code Secondary Panel

Comp Rate Code:	TSDFLT
Description	Salaried Default
	☒ Base Pay ☐ Use Highest Rate
	☐ Default Without Override
Rate Code Type:	Flat Amount
Rate Code Class:	

Comp Rate Code Secondary Panel

Access this page by clicking the Details link on the Amounts page. Displays additional information about the rate code.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, “Working With Multiple Components of Pay,” **Defining Rate Codes**

Changes Tab

Pay Components							First	1 of 1	Last
Amounts		Changes		Conversion					
*Rate Code	Seq	Manually Updated	Change Amount	Change Points	Change Percent				
1	0	☐	0.000000		0.000	+	-		

Pay Components – Changes page

This page displays the change in an employee’s salary.

Manually Updated	The system selects this if you have manually updated the pay components.
Change Amount	The overall change amount to this pay component rate.
Change Points	The overall change amount (in points) to this pay component, if applicable.
Change Percent	The overall percentage change to this pay component, if applicable.

Pay Components						First	1 of 1	Last
Amounts		Changes		Conversion				
*Rate Code	Seq	Source	Default Without Override	Apply FTE	Converted Comp Rate			
1		None	☐	☐		+	-	

Pay Components – Conversion

This page displays the conversion rates in an employee's salary.

Source	The system displays the source of the rate code, such as <i>Absorbing Premium</i> , <i>Seniority Pay</i> , <i>Job Code</i> , or <i>Manual</i> .
Default Without Override	Selected if the worker's compensation package cannot be manually updated on the Job Data – Compensation page.
Apply FTE	Indicates if the converted rate code value will be multiplied by the FTE factor for annualization and deannualization.
Converted Comp Rate	Displays the converted compensation rate for this pay component. The system converts all base pay components to the Job currency and compensation frequency.

Required Fields on Pages

When you see a field on a page with an asterisk (*) preceding the field name, it means the field is required. You can not save a page without entering data into all of the required fields on a page.

*Description:	This is a required field
----------------------	---

Example of a required field label

In some unique instances a field may be required even though there is no asterisk preceding the field name. In such cases, you will be prompted to enter data in these fields before saving the page.

Typographical Conventions and Visual Cues

To help you locate and interpret information, we use a number of standard conventions in our online documentation.

Please take a moment to review the following typographical cues:

monospace font

Indicates PeopleCode.

Bold	Indicates field names and other page elements, such as buttons and group box labels, when these elements are documented below the page on which they appear. When we refer to these elements elsewhere in the documentation, we set them in Normal style (not in bold). We also use boldface when we refer to navigational paths, menu names, or process actions (such as Save and Run).
<i>Italics</i>	Indicates a PeopleSoft or other book-length publication. We also use italics for <i>emphasis</i> and to indicate specific field values. When we cite a field value under the page on which it appears we use this style: <i>field value</i>. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number <i>0</i>, not the letter <i>O</i>.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.
See Also	PeopleBooks provide cross-references under the heading “See Also.” Capitalized titles in italics indicate the title of a PeopleBook; titles in quotes indicate the title of a chapter; titles in normal font refer to sections within the PeopleBook. Here's an example:

See Also

About These HRMS PeopleBooks, **PeopleSoft 8.3 HRMS PeopleBooks Preface**

Note. Text in this bar indicates information that you should pay particular attention to as you work with your PeopleSoft system. If the note is preceded by **Important!**, the note is crucial and includes information that concerns what you need to do for the system to function properly.

Warning! Text within this bar indicates a crucial configuration consideration. Pay very close attention to these warning messages.

Process Introductory Table

In the documentation, each business process in the application is accompanied by an introductory table with pertinent information about the pages used in the process.

<i>Page</i>	<i>System Name</i>	<i>Navigation</i>	<i>Usage</i>
Name of the page.	Gives the system name of the page as specified in the PeopleTools Application Designer. For example, the system name of the Detail Calendar panel is DETAIL_CALENDAR1.	Provides the path for accessing the page.	Describes how you would use the page.

USF U.S. Federal Government Functionality

Any functionality that is specific to the U.S. Federal Government sector will be designated by a USF marker. Most often this will appear at the beginning of a section heading (such as with this section), but the USF designation might also appear in a note or within text, if appropriate.

E&G Education and Government Functionality

Any functionality that is specific to the Education and Government sector will be designated by an E&G marker. Most often this will appear at the beginning of a section heading (such as with this section), but the E&G designation might also appear in a note or within text, if appropriate.

Local Country Functionality

Any functionality that is specific to an individual country will be designated by the three-character ISO code for that country. For example, functionality specific to Germany would be indicated by a DEU designation at the beginning of a section heading. Most often this will appear at the beginning of a section heading (such as with this section), but the country designation might also appear in a Note or within text, if appropriate.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like changed about our documentation, PeopleBooks, and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft HRMS Product Documentation Manager
 PeopleSoft, Inc.
 4460 Hacienda Drive
 Pleasanton, CA 94588

Or send comments by email to the authors of the PeopleSoft documentation at:

DOC@PEOPLESOFT.COM

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions. We are always improving our product communications for you.

CHAPTER 1

About the PeopleSoft 8.3 Human Resources PeopleBooks: Track Faculty Events

This book provides you with the information you will need for implementing and using PeopleSoft Human Resources: Track Faculty Events.

This chapter complements and extends the About the HRMS PeopleBooks section of HRMS documentation by providing specific information on how to use the documentation for Human Resources. Much of the general information you should know before you begin using PeopleSoft documentation is presented in About the HRMS PeopleBooks.

Note. We strongly recommend that you read About the HRMS PeopleBooks. In particular, the PeopleSoft Application Fundamentals section lists where you can find information about topics that apply to many PeopleSoft applications across the HRMS product line. For example, you can find information about setting up control tables, administering security, and setting language and currency preferences in the *PeopleSoft Application Fundamentals for HRMS PeopleBook*.

See Also

PeopleSoft HRMS PeopleBooks Preface, “About the HRMS PeopleBooks”

PeopleBooks Standard Page Element Definitions

Throughout our product documentation, you will encounter fields that are used on many application pages. This section lists the most common fields and provides standard definitions for Human Resources.

Field	Definition
Benefit Plan	A specific benefit offering within a plan type.
Benefit Plan Type	Also known as Plan Type, it is a two-digit code that identifies a benefit category, such as health, life, or savings.
Benefit Program	A collection of benefit plans your company offers to a group of employees.

Field	Definition
Deduction	Any amount taken from an employee's pay check to offset all or part of the cost of the employee's benefits.
Deduction Code	The code assigned to a benefit deduction.
FSA Maximum Annual Pledge	This is the total maximum an employee can pledge to contribution to a health or dependent care flexible spending accounts during a benefit plan year.
FSA Minimum Check Amount	This is the minimum amount for which a check will be printed.
Plan Type	Also known as Benefit Plan Type, it is a two-digit code that identifies a benefit category, such as health, life, or savings.

See Also

PeopleSoft HRMS PeopleBooks Preface, "About the HRMS PeopleBooks," PeopleBooks Standard Page Element Definitions

Understanding the Documentation

Documentation for PeopleSoft Human Resources is made up of 25 business processes, each with their own book:

- Administer Company Cars
- Administer Festive Advance
- Administer Salaries for the Netherlands
- Administer Salary Packaging
- Administer Training
- Administer Variable Compensation
- Administer Workforce
- Base Benefits
- Manage Commitment Accounting
- Manage Competencies
- Manage French Public Sector
- Manage Netherlands Salary Administration
- Manage Performance
- Manage Positions

- Manage Professional Compliance
- Meet Regulatory Requirements
- Monitor Absence
- Monitor Health & Safety
- Plan Careers and Successions
- Plan Salaries
- Recruit Workforce
- Report Total Compensation
- Track Faculty Events
- Track Flexible Service
- Track Global Assignments

Human Resources Reports

The documentation for the Human Resources reports is in the reports chapter in the *PeopleSoft Application Fundamentals for HRMS PeopleBook*. There you will find information about each report, listed by module.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, “Appendix: PeopleSoft Application Fundamentals for HRMS Reports”

CHAPTER 2

Tracking Tenure

This chapter discusses how to:

- Set up service accrual control tables.
- Assign an employee to tenure.
- Run the tenure calculation process.

Understanding Tracking Tenure

The Track Faculty Events business process in PeopleSoft Human Resources offers a tenure tracking feature that enables you to track the tenure eligibility of your faculty using complex rules that you set up. You can:

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

Common Elements Used in This Chapter

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

Identifying Departments Capable of Granting Tenure

On the Department Table – Comm. Acctg. and EG page, select the Tenure Granting check box to indicate that the department can grant or award tenure. The system automatically selects the Granting Dept? (granting department?) check box on the Tenure Data page for employee's assigned to tenure granting departments.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, “Working with Companies, Agencies, and Locations,” Enabling and Controlling Department Information for Specified Customers

Setting Up Service Parameters

The pages in the Maintain Service Parameters component enable you to define basic parameters such as how to:

- Round a date.
- Convert a raw date to a decimal date.
- Calculate a year.
- Specify a certain number of days per month, or use the calendar month.
- Define the database alias (*EVENT_DT*) to define the reference to the job history.
- Activate the application trace, which traces the calculation process while it is run.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, “(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.

The service rules become part of a Definition Name, which you then assign to a service type. This gives you and your organization flexibility when determining calculation rules for different types of service accrual processing. You assign the definition name to a service type. The system processes service types based on the service rules defined for the definition name.

Service types belong to a calculation group. You can associate a calculation group with one or more service types. The calculation group enables you to group employees that whose will service accrual processes have use the same calculation rules applied to their service accrual process.

Set up service accrual control tables in the following order:

1. Define service calendars on the Calendar page.
2. Set up HR actions and categories to categorize the job actions and reason codes that count toward service accrual on the HR Action/Category page.
3. Create service rules to set up tenure accrual processing on the Service Rules component.
4. Specify calculation groups on the Calculation Group page.
5. Establish academic ranks on the Academic Rank page.

6. Set up experience and credit codes on the Exp/Credit Codes page.

Several of these setup tables that you use to establish service accrual rules are shared with the Tracking Flexible Service feature.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, “(E&G) Setting Up Service Parameters and Service Accrual Control Tables”

Pages Used to Set Up Service Accrual Control Tables

Page Name	Object Name	Navigation	Usage
Academic Rank	EG_RANK_TBL	Develop Workforce, Manage Faculty Events, Setup, Academic Rank, Academic Rank	Establish academic ranks, tenure tracking eligibility for those ranks, and probationary periods. Before using this page, set up the Calculation Group page.
Exp/Credit Codes (experience and credit codes)	EG_EXP_DFN	Develop Workforce, Manage Faculty Events, Setup, Exp/Credit Codes, Exp/Credit Codes	Define the experiences and credits that employees can earn at other institutions and apply toward tenure at your organization. Set up a credit code for start-up credit to bring forward any accrued service credit in your organization on the initial loading of tenure service data.

The service rules become part of a definition name, which gives you flexibility when determining calculation rules for different types of service accrual processing. You assign the definition name to a service type. The system processes service types based on the service rules defined for the definition name.

Service types belong to a calculation group. You can associate a calculation group with one or more service types. The calculation group enables you to group employees whose service accrual processes use the same calculation rules.

Establishing Academic Ranks

Access the Academic Rank page.

Academic Rank: 001

View All First 1 of 1 Last

*Effective Date: 01/01/1990

*Status: Active

*Description: Professor

Rank-IPEDS: Professor

Short Description: Prof

☒ Eligible for Tenure Tracking?

Tenure Tracking Eligibility

Calc Group: FAC

Probationary Period (# of yrs): 6.0

☐ Partial Credit Allowed?

☐ Carry automatic tenure?

Academic Rank page

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

Select the rank, such as *Professor*, for IPEDS reporting.

Rank-Stats Can (Statistics Canada)

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

Eligible for Tenure Tracking?

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

Tenure Tracking Eligibility

Calc Group (calculation group)

Select the calculation group for this academic rank. For example, select *FAC* (faculty) to include the Associate Professor rank in the faculty calculation group.

Probationary Period (# of yrs) (number of years)

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

Partial Credit Allowed?

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

Carry automatic tenure? Select this check box if tenure automatically applies to this rank. This does not affect the tenure calculation process.

Setting Up Experience and Credit Codes

Access the Exp/Credit Codes page.

Exp/Credit Codes

Experience or Credit Code: PUNV

View All First 1 of 1 Last

*Effective Date: 01/01/1950 *Status: Active

*Description: Prior University Experience

Short Description: Prior Univ

☒ Add to Tenure Services

Exp/Credit Codes page

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.

Add to Tenure Services Select this 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

Set up the default academic rank from either the job code or position level when you set up employee tenure data on the Tenure Data page.

To set the default academic rank:

- At the job code level, use the Job Code Table – Evaluation Criteria page.
- At the position level, use the Position Data – Work Location page

See Also

PeopleSoft Human Resources PeopleBook: Manage Positions, “Setting Up Positions,”
Entering Work Location Information

“Setting Up Jobs and Pay Groups, ”Assigning Points to Job Evaluation Criteria”

Assigning an Employee to Tenure

Different job actions trigger tenure actions. For example, when you hire, promote, or transfer an employee, the change from one job action to a different one might continue to count for service, or it might start a break in the service. When you assign an employee to tenure, the system adds a new tenure record and prior experience or credit records to the tenure tracking tables to initiate future processing and information lookups.

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

In this section, we discuss how to:

1. Activate tenure accrual.
2. Define tenure data.
3. Define prior experience and credits.

Entering credits and experience ensures that any start-up credits earned at other institutions are counted toward the employee's tenure accrual.

4. View the change history.
5. View related jobs.

Pages Used to Assign an Employee to Tenure

Page Name	Object Name	Navigation	Usage
Tenure Data	EG_EMPL_TENURE	Develop Workforce, Manage Faculty Events, Use, Tenure Data, Tenure Data	Maintain tenure tracking data for employees. Default information is automatically populated from the Job Data component.
Prior Experience/Credits	EG_PRIOR_EXP	Develop Workforce, Manage Faculty Events, Use, Tenure Data, Prior Experience/Credits	Track an employee's service accrued from other institutions that counts toward your organization's tenure service clock. Maintain experience and credit types on the Exp/Credit page.

Page Name	Object Name	Navigation	Usage
Change History	EG_TENURE_CHG	Develop Workforce, Manage Faculty Events, Inquire, Rank/Status Change History, Change History	View changes made to academic rank and tenure status associated with a home department. The system automatically tracks changes. This page is display-only.
Related Jobs	EG_JOB_VW	Develop Workforce, Manage Faculty Events, Inquire, Related Jobs for Tenure, Related Jobs	Review current jobs that count toward an employee's tenure. This page is display-only.

Activating Tenure Accrual

To activate Tenure Tracking for an employee:

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

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

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

Defining Tenure Data

Access the Tenure Data page.

Tenure Data		Prior Experience/Credits		Service History	
Niles, William				ID: PU018	
*Tenure Status:	Non Tenure On Track	Home Rank:	001	Professor	
Track Start Dt:	02/01/1995	Rank/Sts Chg Effect:	02/01/1995	Chg Reason:	
Orig. Track Dt:	02/01/1995	*Tenure Home:	PSU5306	Electrical Engineering	☒ Granting Dept?
Calc Group:	FAC	Mand. Review Dt:		Granted Date:	
☐ Override Calculation?		Committed FTE:	0.50	SHARE	Notes
Probation (Number of Years)					
Total Req'd:	6.000000	Time Accrued:	0.450000	Current As Of:	12/31/1995
Extended By:	0.000000	Time To Accrue:	5.550000	☐ Terminal Year	
Other Tenure Departments					
View All First 1 of 1 Last					
Dept	Rank	Tenure Status	Effective Date	CommFTE	
					+ -

Tenure Data page

Tenure Status

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

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

Home Rank

This value is automatically populated from the Position Data component or the Job Code component. If you did not set up a home rank, select it here, such as *005* (professor).

Track Start Dt (track start date)

Displays the date the employee's tenure accrual begins. The default is the hired date from the employment record. Employees with the Non Tenure On Track tenure status must have a track start date.

The track start date 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 date is *09/01/1996*, then the calendar begin date must be 09/01/1996. For this reason, you might define calendars only to accommodate track start dates.

Rank/Sts Chg Effect (rank or status change effect) and Chg Reason (change reason)	These fields display the date the rank or status change is effective and the reason for the change. The default date is the track start date. If the Chg Reason field does not display a default, select one of the following options: <i>None</i> , <i>Correction</i> , <i>Mid Period</i> , <i>New</i> , <i>Other</i> , <i>Pending</i> , <i>Recalc</i> (recalculate), or <i>Retro Adj</i> (retroactive adjustment).
Orig. Track Dt (original track date)	Displays the date tenure tracking begins for the employee. The default is the track start date.
Tenure Home	Displays the department granting the employee's tenure. This value is automatically populated from the employee's current Job record.
Granting Dept?	This display-only check box is selected if the Tenure Home field displays the department granting the tenure status.
Calc Group	Select the group used to calculate tenure accrual.
Mand. Review Dt (mandatory review date)	Enter the employee's mandatory review date.
Granted Date	Enter the date tenure was granted.
Override Calculation?	Select if you do not want this employee to be included in the tenure calculation process.
Committed FTE	Enter the percentage of time the employee is a committed FTE. This enables 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. The tenure calculation process does not use other tenure departments' information.
Notes	Click this button to enter notes regarding the employee's tenure.
<i>Probation (Number of Years)</i>	
Total Req'd (total required)	Displays the total number of probationary years required before granting tenured status. This value is automatically populated from the Academic Rank Table.
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 value populates the Tenure Data – Service History page.
Time To Accrue	Displays the remaining probationary years the employee must accrue.

Current As Of	Displays the end date of the last processed computational period.
Terminal Year	Select when the employee is in the last year of probation. For example, if the total of required probationary years is 8 and the time to accrue is 1, select this check box. The Time Accrued and Time To Accrue fields display 0 years when you select this check box.

Other Tenure Departments

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

Dept (department)	Enter other departments in which the employee is accruing tenure. For example, an employee might hold positions in two departments. Note. If the check box next to the Dept field is selected, the department is a tenure-granting department.
Rank	Enter the rank the employee holds in that department. Maintain ranks in 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.

Defining Prior Experience and Credits

Access the Prior Experience/Credits page.

Tenure Data		Prior Experience/Credits		Service History	
Niles, William			ID: PU018		
Orig Hire:	02/01/1995	Per Status:	E Employee	Hi Educ Lv:	A Not Indic
Summary Totals					
Req'd:	6.000000	Accr'd:	0.450000	Prior:	0.500000
				Time To Accrue:	5.050000
Prior Experience/Credit					
View All First 1 of 1 Last					
*Exp/Cr Type	*Cr From Date	Cr To Date	Credit Granted	Add To Tenure?	Granted at Rank
PRSH	01/01/2000	07/31/2000	0.500000	☒	002
Prior Research Experience					Assist Professor
					Notes + -
					0.500000

Prior Experience/Credits page

Orig Hire (original hire)	Displays the date the employee was hired.
Per Status	Displays the employee's status, such as <i>Employee</i> or <i>Contractor</i> .
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 value is automatically populated 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 value is automatically populated from the Time Accrued field on the Tenure Data page. The number changes if you make an online adjustment to the service history.
Prior	Displays the total number of years from prior employment that count toward tenure service (calculated to two decimal places).
Time To Accrue	Displays the number of years remaining to accrue tenure status. This value is automatically populated from the Time To Accrue field on the Tenure Data page. The number of years remaining to accrue tenure status changes if you make an online adjustment to the service history.

Prior Experience/Credit**Exp/Cr Type** (experience or credit type)Select the employee's previous experience or credit type, such as **RSHR** (research).**Cr From Date** (credit from date) and **Cr To Date** (credit to date)

Enter the beginning and ending dates of the experience or credit.

Credit Granted

Enter the amount of credit granted for the prior experience.

Add To Tenure?

Select this check box to add these credits to tenure accrual.

Granted at RankSelect the rank at which the credits were granted, such as **005** (professor).**Notes**

Click this button to enter comments regarding prior experience.

Viewing the Change History

Access the Change History page.

Change History				
Employee:	Niles, William		PU018	
Tenure Home:	PSU5306	Tenure Status:	NTK On Track	Calc Group: FAC
Track Start Dt:	02/01/1995	Override Calc?:		Tenure Granted Date:
Home Department Rank/Status Change History			View All	First 1 of 1 Last
Eff Date	Academic Rank	Tenure Status	ACTN DATE	Change Reason
02/01/1995	001 Professor	NTK On Track	05/31/2000	

Change History 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.

Calc Group	Displays the calculation group used to calculate this employee's tenure, such as <i>FAC</i> .
Track Start Dt	Displays the date tenure tracking began for the employee.
Override Calc? (override calculation?)	This check box is selected only if the Override Calculation? check box is selected on the Tenure Data page.
Tenure Granted Date	Displays the date tenure was granted if the employee received tenure status.

Home Department Rank/Status Change History

Academic Rank	Displays the employee's academic rank at the time of the rank or status change.
Tenure Status	Displays the employee's tenure status at the time of the rank or status change.
ACTN DATE (action date)	Displays the date the rank or status change takes place.
Change Reason	Displays the reason for the rank or status change.

Viewing Related Jobs

Access the Related Jobs page.

Related Jobs

Employee: Niles,William **PU018**
Tenure Home: PSU5306 Electrical Engineering **Tenure Status:** NTK On Track
Track Start Dt: 02/01/1995 **Calc Group:** FAC **Override Calc?:** **Tenure Granted Dt:**

Jobs Counted for Tenure Accrual					View All	First	1 of 1	Last
Empl Rcd#	FTE For Accrual	Current Department	Job Code	Position				
0	0.50	PSU5306 Electrical Engineering	PU3700 Professor	PUU6027				

Related Jobs page

Employee	Displays the employee's name and ID.
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Tenure Home	Displays the code for the department in which the employee received, or will receive, tenure.
Track Start Dt	Displays the date tenure tracking began for the employee.
Tenure Status	Displays the employee's tenure status.
Calc Group	Displays the calculation group used to calculate this employee's tenure, such as <i>FAC</i> .
Override Calc?	This check box is selected only if the Override Calculation? check box is selected on the Tenure Page.
Tenure Granted Dt (tenure granted date)	Displays the date the employee received tenure status.
<i>Jobs Counted for Tenure Accrual</i>	
Empl Rcd# (employee record number)	Maintain this number in the Job Data component.
FTE For Accrual	Displays the employee's FTE value, such as <i>.80</i> for an employee working 80 percent of a normal full-time schedule. Maintain the FTE for accrual on the Employment Data – Employment Information page.
Job Code	Maintain job code IDs on the Job Code component.
Position	Displays the employee's position number and a description of the position.

Running the Tenure Calculation Process

In this section, we provide an overview of the tenure calculation process and discuss how to:

- Calculate tenure.
- View the message log.
- View the results of the tenure calculation process.
- View the tenure calculation summary.
- View the service history.
- View updated tenure data.

Understanding the Tenure Calculation Process

Tenure calculation is a two-step process:

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

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

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

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

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

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

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

How the System Calculates Tenure Service

To calculate tenure service, the system:

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

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

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

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

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

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

- 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.

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

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

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

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

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, “(E&G) Setting Up Service Parameters and Service Accrual Control Tables”

How the System Updates Tenure and Service History

To update tenure service and service history, the system:

- Processes employees by selecting their service details from the temporary service history file.
- Updates employee tenure data records 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 amount in the Total Req'd field.
 - Updates the Current As Of field to show the to date of the calculation period
- Updates the employee service history with the new tenure accrual details from the temporary file.
- Purges the tenure accrual details from the temporary service history file.

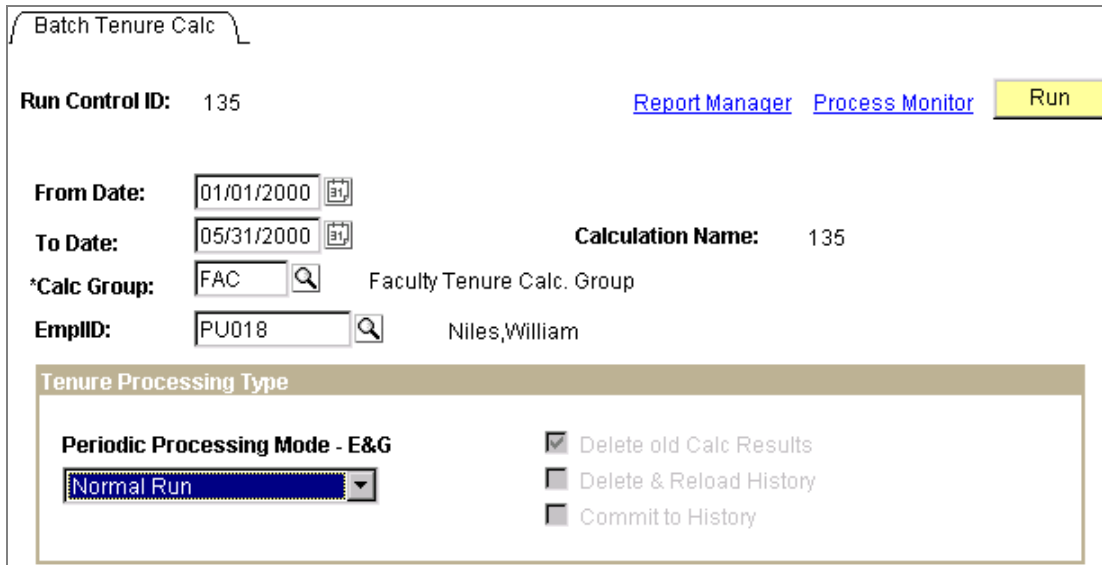
Pages Used to Run the Tenure Calculation Process

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Batch Tenure Calc (batch tenure calculation)	RUNCTL_EGPP01	Develop Workforce, Manage Faculty Events, Process, Tenure Calc Process, Batch Tenure Calc	Run tenure calculation processes and update tenure service history. Before using this page, set up the Calculation Group page.
Message Log	EG_MESSAGE_LOG	Administer Workforce, Administer Flexible Service, Inquire, Message Log, Message Log Develop Workforce, Manage Faculty Events, Inquire, Message Log, Message Log	View dated and timed information about calculation processes. This page tracks errors in processes and searches for error messages associated with a particular run.
Periodic Process	EG_PRDIC_RSLTS	Administer Workforce, Administer Flexible Service, Inquire, Periodic Results, Periodic Process Develop Workforce, Manage Faculty Events, Inquire, Tenure Run Results, Periodic Process	View the results of the tenure calculation process, such as the employee's tenure status, what was processed, and whether the run was successful or not. This information is temporary and changes when you run the calculation process in Update to History mode.
Tenure Calc Summary (tenure calculation summary)	EG_CLC_SVC_SUM	Develop Workforce, Manage Faculty Events, Inquire, Tenure Calc Summary, Tenure Calc Summary	View the results of the tenure accrual for the calculation process run in Normal Run or Delete_Rebuild History mode. When you run the calculation process in Update to History mode, you can no longer view this page.

Page Name	Object Name	Navigation	Usage
Tenure Data - Service History	EG_SVC_HIST	Develop Workforce, Manage Faculty Events, Use, Tenure Data, Service History	View the permanent results of a calculation process run in Update to History mode, including the history of tenure time calculated or adjusted. Also, make adjustments to include the next time you run a calculation process in Update to History mode. When you make adjustments, the system automatically updates the totals on the Tenure Data page.

Calculating Tenure

Access the Batch Tenure Calc page.



Batch Tenure Calc page

From Date and To Date

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

For example, you might want to calculate tenure for an academic year that consists of two computational periods: 01/01/98 to 06/31/98, and 07/01/98 to 12/31/98. Therefore, enter **01/01/98** as the from date and **12/31/98** as the to date. The process creates a service history for each computational period.

Calc Group

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

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

EmplID (employee ID)

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

Tenure Processing Type

Use the **Period Processing Mode - E&G** drop-down list box to select the mode in which you want to run the tenure calculation process. The system automatically selects one of the related check boxes to reflect your selection. Mode options include:

Delete & Rebuild History

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

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

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

Normal Run

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

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

Update to History

Select this mode to update the Tenure Data – Service History page. The results from using Normal Run mode become the input data for this mode.

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

When you select this option, the system selects the **Commit to History** check box.

Viewing the Message Log

Access the Message Log page.

Message Log

View Messages

*Search Criteria Process Instance To Instance Job ID

Instance 2 2

☐ Show Program Names

[View All](#) First 1 of 1 Last

Instance	Job ID	DateTime	Program Name
2		05/02/2000 9:52:22AM	Process Request shows status of 'INITIATED' or 'PROCESSING' but no longer running

Message Log page

Search Criteria

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

Process Instance and To Instance

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

Job ID

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

Show Program Names

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



Click the **Search** button to display the messages.

DateTime

Displays the date and time the program was run.

Program Name

If you select the **Show Program Names** check box, the program message displays in the text box.



Click this button to display detailed information about an error message.

Viewing Periodic Process Results

Access the Periodic Process page.

Periodic Process			
Run Control ID:	135	Run Date:	08/28/2000
Process Instance:	80	Run Status:	Complete with no Errors
To Date:	05/31/2000	Periodic Cycle:	
Service Calculation Group:	FAC	ID:	PU018
Calculate All Groups:	N	Process Mode:	Normal Run
Delete & Reload History:	N	Delete old Calc Results:	Y
		Commit to History:	N
View All First 1 of 1 Last			
Calc Group:	FAC	Employees Processed:	1
Service Type:	FACTENURE	Employees with Errors:	0
Employees with Errors			
View All First 1 of 1 Last			

Periodic Process page

Process Instance	Displays the calculation process instance number.
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 calculation process.
Periodic Cycle	Displays the periodic cycle for this run control ID.
Process Mode	Displays the period processing mode from the Batch Tenure Calc page (for Managing Faculty Events) or the Service Calc page (for Tracking Flexible Service).
Service Calculation Group	Displays the calculation group included in this calculation process run.
ID	If you are running the calculation process for an individual employee, this field displays the employee's ID number.
Calculate All Groups	Displays <i>N</i> (no).
Delete & Reload History, Delete Old Calc Results, and Commit to History	Displays <i>Y</i> (yes) or <i>N</i> (no), depending on the period processing mode that you selected.
Service Type	Displays the service type included in the calculation process.

Employees Processed	Displays the number of employees processed during this calculation process.
Employees with Errors	Displays the number of employee records the system designated as erroneous during the calculation process.

Viewing the Tenure Calculation Summary

Access the Tenure Calc Summary page.

Tenure Calc Summary

User ID:	PS	Run Control ID:	135
Calculation Name:	135	From Date:	01/01/2000
		To Date:	05/31/2000

View AllFirst1-2 of 10Last					
Begin/End Date	Service Amt without Breaks	Service Amt with Breaks	Service Adjustment	Accrued Service	Accum Breaks
08/01/1995	0.250000	0.250000	0.000000	0.950000	0.000000
12/31/1995		Action:	(BFW)	Breaks:	0.000000
EmplID:	PU018	Niles,William			
01/01/1996	0.250000	0.250000	0.000000	1.200000	0.000000
05/31/1996		Action:	HIR ()	Breaks:	0.000000
EmplID:	PU018	Niles,William			

Tenure Calc Summary page

From Date and To Date	Displays the dates between which the tenure calculation process was run.
As of Date:	Displays the date the calculation process was run.
Begin/End Date	Displays the beginning and ending dates for this calculation process.
Service Amt without Breaks (service amount without breaks)	Displays the amount of service without breaks that counts toward tenure.
Service Amt with Breaks (service amount with breaks)	Displays the amount of service with breaks that counts toward tenure.
Service Adjustment	Not 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 comes forward in an entry with an action of **BFW**. Begin and end dates for the entry show the date prior to the from date of the period specified on the Batch Tenure Calc 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.

Viewing the Service History

Access the Tenure Data - Service History page.

Tenure Data		Prior Experience/Credits		Service History	
Niles, William				ID: PU018	
Req'd:	6.000000	Accr'd:	2.700000	Prior:	0.500000
			Time To Accrue:	2.800000	
View All First 1-3 of 11 Last					
Begin Date	End Date	Service w/o Breaks	Total Service Accrued	Accum Breaks	Rank
01/01/2000	05/31/2000	0.250000	3.200000	0.000000	001
Action: HIR Reason Code:		Adj Rsn:	Notes		
08/01/1999	12/31/1999	0.250000	2.950000	0.000000	001
Action: HIR Reason Code:		Adj Rsn:	Notes		
01/01/1999	05/31/1999	0.250000	2.700000	0.000000	001
Action: HIR Reason Code:		Adj Rsn:	Notes		

Tenure Data - Service History page

Req'd (required)

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

Accr'd

Displays the number of years accrued toward tenure.

Prior

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

Time to Accrue

Displays the remaining number of years before tenure is granted.

Begin Date and End Date	Displays the beginning and ending dates of the tenure in this calculation process. You cannot change these dates if the service history for the period already exists.
Process Date	Displays the end date of the cycle.
Service w/o Breaks (service without breaks)	Displays the percent of FTE accrued without service breaks.
Total Service Accrued	Displays the total percentage of services accrued. This field increases incrementally when the calculation process is run.
Accum Breaks (accumulated breaks)	Displays the accumulated service breaks.
Rank	Displays the rank for the calculation group.
Calc Group	Displays the calculation group, such as <i>FAC</i> .
Gen/Adj (generated or adjustment)	If the calculation process creates the line, this field displays <i>G</i> (generated). If it is entered online, it displays <i>A</i> (adjustment).
Action	Displays the job action, such as <i>LOA</i> (leave of absence), occurring within the requested period.
Reason Code	Displays the reason code associated with the action that makes it count toward accrued tenure.
Adj Rsn (adjustment reason)	Select the reason tenure is added to the total tenure accrued. Use this field to adjust tenure accrual history records. You can add a new row, adjust an existing row. You can also modify a record generated by the system. However, running a calculation process in Delete_Rebuild History mode purges the record.
Notes	Click this button to display notes regarding the employee's tenure history.

CHAPTER 3

Tracking Events

This chapter discusses how to:

- Track faculty events
- Track Committee information.

Tracking Faculty Events

In this section we discuss how to track a variety of faculty events.

Pages Used to Track Faculty Events

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Activities	EG_ACTIVITIES	Develop Workforce, Manage Faculty Events, Use, Activities, Activities	Track employee activities.
Administrative Post Table	EG_ADMIN_POST_T BL	Develop Workforce, Manage Faculty Events, Setup, Administrative Posts, Administrative Post Table	Set up administrative posts.
Administrative Posts	EG_ADMIN_POSTS	Develop Workforce, Manage Faculty Events, Use, Administrative Posts, Administrative Posts	Track administrative posts and appointments and titles that you do not want to track in the Job Data component. Before using this page, set up the Administrative Post Table page.

Page Name	Object Name	Navigation	Usage
Education - School Education	EG_SCHOOL_EDUCAT	Develop Workforce, Manage Faculty Events, Use, Education, School Education	Track educational background. Use this information to determine employee abilities for career and tenure planning.
Education - Professional Ed. and Training (education - professional education and training)	EG_EDUCAT_TRAIN_GB	Develop Workforce, Manage Faculty Events, Use, Education, Professional Ed. and Training	Track professional education and training.
Honors Awards	EG_HONORS_AWARDS	Develop Workforce, Manage Faculty Events, Use, Honors and Awards, Honors Awards	Track honors and awards.
Licenses and Certificates	EG_LICENSE_CERTIFS	Develop Workforce, Manage Faculty Events, Use, Licenses and Certificates, Licenses and Certifications	Track licenses and certificates.
Memberships	EG_MEMBERSHIPS	Develop Workforce, Manage Faculty Events, Use, Memberships, Memberships	Track memberships.
Presentations	EG_PRESENTATIONS	Develop Workforce, Manage Faculty Events, Use, Presentations, Presentations	Track presentations.
Publications	EG_PUBLICATIONS	Develop Workforce, Manage Faculty Events, Use, Publications, Publications	Track publications.
Significant Special Projects	EG_SPECIAL_PROJECT	Develop Workforce, Manage Faculty Events, Use, Significant Special Projects, Significant Special Projects	Track special projects.

Page Name	Object Name	Navigation	Usage
Student Advisement	EG_ADVISEMENT	Develop Workforce, Manage Faculty Events, Use, Student Advisement, Student Advisement	Track student advisement.
Teaching Responsibilities	EG_TEACHING_RES P	Develop Workforce, Manage Faculty Events, Use, Teaching Responsibilities, Teaching Responsibilities	Track teaching responsibilities.

Common Elements Used in This Section

Average Grade	Enter an average grade, using letters or numbers. For example, 3.8 .
School Code	Select a school code. When you press TAB, the system automatically displays the school name, state, and country. If no code exists, enter the school name in the related field. Maintain school codes in the School Table.
Country and State	Enter the school country and state if the system does not automatically display them. If you select a different country code after you have already selected a state code, the system clears the value in the State field.

Tracking an Employee's Activities

Access the Activities page.

Activities		Niles, William		ID:	PU018
Tenure/Home Dept:		PSU5306	Electrical Engineering		
Academic Rank:		Professor	Tenure Status:		On Track
Activities View All First 1 of 1 Last					
Activity Type:	Scholarly Research			+ -	
Activity:	Research				
Sponsor:	Department			Internal/External:	Internal
From Date:	02/01/1999	Thru Date:	11/30/2000	*Compensated:	N
Organization:					
Comments:					

Activities page

Compensated Enter *Y* if the employee was compensated for the activity, or *N* if the employee was not compensated.

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

Setting Up Administrative Posts

Access the Administrative Post Table page.

Administrative Post Table	
*Administrative Post:	Chair
Description:	Board Chair
Post Type:	Administrative

Administrative Post Table page

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

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

Tracking an Employee's Administrative Posts, Titles, and Appointments

Access the Administrative Posts page.

Administrative Posts		ID:	PU018
Niles, William		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

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

Tracking an Employee's School Education

Access the Education - School Education page.

School Education		Professional Ed. and Training	
Chretien, Shirley		ID: B-BARET203	
Country:	USA		
School Type:	UNK Unknown	Level Achieved:	
Date Acquired:			
Average Grade:		☐ Completed	
School Code:		School Name:	
State:			
Area of Study		View All First 1 of 1 Last	
*Area of Study	Grade		
1		+ -	

Education - School Education page

Date Acquired Enter the date when the level of education was achieved.

Completed Select if the program is complete.

Tracking an Employee's Professional Education and Training

Access the Education - Professional Ed. and Training page.

School Education		Professional Ed. and Training	
Niles, William		ID: PU018	
		View All First 1 of 1 Last	
Country:	USA	United States	
*Degree:	BS	Bachelor of Science	
Date Acquired	05/31/1982	Average Grade:	3.25
Major Code:	K000003	Major:	Electrical Engineering
School Code:	KUS021	School:	Georgetown University
Educator:			
State:	DC	District of Columbia	
		+ -	
Training		View All First 1 of 1 Last	
Course Title	School Name	Start Date	End Date
		+ -	

Education - Professional Ed. and Training page

Degree Select the degree the employee has earned.

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

Date Acquired	Enter the date the employee acquired the degree.
Graduated	Select if the employee graduated.
Major Code and Major	When you select a major code, the system automatically displays the corresponding major and makes the Major field unavailable for entry. To enter a major that does not have a code, leave the Major Code field blank and enter a description in the Major field.
Educator	Enter additional information about the educator, such as organization (other than school), or instructor's name.

Tracking an Employee's Honors and Awards

Access the Honors Awards page.

Honors Awards

Niles, William ID: PU018

Honors and Awards View All First 1 of 1 Last

Honor or Award	Grantor	Issue Date	End Date
BOD Board of Directors Appointment	Bill Haley	01/15/1999	

Honors Awards page

Honor or Award	Select the honor or award code. The system automatically displays a description. If you do not select an honor or award from the available options, enter your own description.
-----------------------	---

Tracking an Employee's Licenses and Certificates

Access the Licenses and Certifications page.

Licenses and Certifications

Niles, William ID: PU018

Licenses and Certifications View All First 1 of 1 Last

*License/Certif Code: CPR Cardio Pulmonary Resuscitation + -

Issue Date: 03/29/1996

License #: 123456

Issued By: American Red Cross

Expiration Date: 03/29/1998

☒ License Verified

☒ Renewal in Progress

Issued In

Country: USA State:

Licenses and Certificates page

License/Certif Code (license and certificate code) Select the code for the license or certificate that the employee earned.

License Verified Select if you have confirmed that this employee holds the license or certificate.

Renewal in Progress Select if the employee is currently renewing the license or certificate.

Tracking an Employee's Memberships in Professional Organizations

Access the Memberships page.

Memberships

Niles, William ID: PU018

Memberships View All First 1 of 1 Last

	*Organization Description	Membership Date	Mandate	Mandate Position	Mandate Begin Date	Mandate End Date	
1	AIT Association Intl Toastmasters	02/13/1991					+ -

Memberships page

Organization Select the code for the organization to which the employee belongs.

Mandate, Mandate Position, Mandate Begin Date, and Mandate End Date If the employee has a mandate within the organization, enter it here, along with the position and begin and end dates, if applicable.

Tracking an Employee's Publications

Access the Publications page.

Publications

Niles, William

ID: PU018

View All First 1 of 1 Last

*Publication Number: 1

Publication Type: Article

Author Type: Author

Publication Title: The Future of Electrical Engineering

Publication Name: Engineering Today

Publisher: Random House

Publication Information

☒ Date Format

Date: 03/11/1996

Volume: 4

Issue: 13

Page Number(s): 4

Notes:

Publications page

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

Tracking Significant Special Projects

Access the Significant Special Projects page.

Significant Special Projects	
Niles, William	
ID:	PU018
Tenure/Home Dept:	PSU5306 Electrical Engineering
Academic Rank:	Professor
Tenure Status:	On Track
Special Projects	
View All First 1 of 1 Last	
*Date Completed:	04/28/1998
Department:	PSU5306 Electrical Engineering
Organization:	Science World / State University
Description:	Was supervising professor to engineering students setting up exhibit on electricity at Science World.

Significant Special Projects page

Organization Enter the internal or external organization for which the special project was completed.

Tracking an Employee's Student Advisees

Access the Student Advisement page.

Student Advisement	
Niles, William	
ID:	PU018
Tenure/Home Dept:	PSU5306 Electrical Engineering
Academic Rank:	Professor
Tenure Status:	On Track
Student Advisement	
View All First 1 of 1 Last	
*Student Name:	Brady, Shawn
Advisement Level:	Master's Thesis
From Date:	09/01/1998
Thru Date:	02/15/2001
Project:	The Future of Electrical Engineering
Date Due:	11/30/2000
Comments:	

Student Advisement page

Student Name Enter the student advisee's name in the following format:
Johnson, Jill.

Tracking a Faculty Member's Teaching Responsibilities

Access the Teaching Responsibilities page.

Teaching Responsibilities	
Niles, William	ID: PU018
Tenure/Home Dept: PSU5306 Electrical Engineering	Tenure Status: On Track
Academic Rank: Professor	
Teaching Responsibilities View All First 1 of 1 Last	
*Course ID: 1357	+ -
Title: The Future of Electrical Engineering	
Course Type: Discussion	Units: 3
Term: 1 Year: 2000 ☒ Team Taught	Percent: 50.00
View All First 1 of 1 Last	
Enrollment Type: UnderGrad	Number Enrolled: 65
	+ -

Teaching Responsibilities page

Course ID (course identification)	Enter the course ID, such as <i>TF001</i> (teach).
Term	Enter the term in which the course is taught. For example, enter <i>2</i> to indicate the course is taught in the second term.
Team Taught	Select this 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.

Tracking Committee Information

In this section, we discuss how to:

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

Pages Used to Track Committee Information

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Committee Type	EG_COMMITTEE_TABLE	Develop Workforce, Manage Faculty Events, Setup, Committee Type Table, Committee Type Table	Maintain committee types and committee roles within each type.
Committee	EG_COMMITTEE	Develop Workforce, Manage Faculty Events, Setup, Committees, Committee	Establish a committee and attach a committee type.
Committee Members	EG_COMMITT_MEMBERS	Develop Workforce, Manage Faculty Events, Setup, Committees, Committee Members	Assign employees to a committee.
Employee Committees	EG_COMM_MBR_VIEW	Develop Workforce, Manage Faculty Events, Inquire, Employee Committees, Employee Committees	View the committees to which an individual employee belongs. This page is display- only.

Setting Up Committee Types

Access the Committee Types page.

Committee Type

Committee Type: SOCIAL

View All First 1 of 1 Last

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

***Description:** Social Events

Short Description: Social

View All First 1 of 1 Last

***Committee Role:** Staff + -

***Description:** Social Planners

Short Description: Planners

Committee Type page

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

Note. You can add additional committee roles to new committee types only—not to existing committee types.

Establishing Committees

Access the Committees - Committee page.

Committee Committee Members

Committee: SOCIAL

View All First 1 of 1 Last

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

***Committee Name:** Social Events

Committee Type: SOCIAL Social Events

Description: Co-ordinates staff and student social events

Committees - Committee page

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

Assigning Committee Members

Access the Committees - Committee Members page.

The screenshot shows the 'Committee Members' page in PeopleSoft. At the top, there are two tabs: 'Committee' and 'Committee Members'. The 'Committee' tab is selected. Below the tabs, the following information is displayed:

- Committee:** SOCIAL
- Committee Type:** SOCIAL Social Events (with '+' and '-' buttons)
- Effective Date:** 01/03/2000
- Status:** Active

Below this information is a table with the following columns: 'Member Nbr', 'EmpID', 'Role', 'Start Date', and 'End Date'. The table contains one row of data:

Member Nbr	EmpID	Role	Start Date	End Date
1	PU018	Social Planners	01/04/2000	01/03/2001

Committee Members page

Member Nbr (member number)

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

Role

Select the role of the committee member, such as *Chair*

Start Date and End Date

Enter the beginning and ending dates of the committee membership.

CHAPTER 4

Reviewing Cases

This chapter discusses how to define and review employee cases.

Defining and Reviewing Employee Cases

In this section we cover:

- Defining the purpose of the case and how it relates to the faculty member.
- Reviewing sensitive information and recommendations from specific reviewers.

Note. Only users with access to the current steps in the review process can access this information.

- Viewing case data and recommendation information.
- Viewing approved cases.

Note. All users with access to an employee's job record can view this information.

Pages Used to Define and Review Employee Cases

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Case Review	EG_CASE_REVIEW	Develop Workforce, Manage Faculty Events, Use, Case Review, Case Review	Define an employee case. For example, a case could involve a decision to give a faculty member a change in tenure status, or a title change.
Review Path	EG_REVIEW_PATH	Develop Workforce, Manage Faculty Events, Use, Review Path, Review Path	Review case information by selecting the employee and the case ID that you want to review.

Page Name	Object Name	Navigation	Usage
Case View	EG_CASE_REVIEW_VW	Develop Workforce, Manage Faculty Events, Inquire, Case Progress View, Case View	View the less sensitive information from the Case Review and Review Path pages. This page is display-only.
Final Status	EG_CASE_FIN_VW	Develop Workforce, Manage Faculty Events, Inquire, Case Final Status, Case Final Status	View the final, approved employee cases. Use this information as a reference when you enter resulting changes in the faculty member's Job Data component. This page displays details from approved cases only.

Common Elements Used in This Chapter

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

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

Defining the Purpose of a Case

Access the Case Review page.

Case Review

Niles, William ID: PU018

Tenure/Home Dept: PSU5306 Electrical Engineering Annual Rate: 40000.000

Academic Rank: Professor Tenure Status: On Track

View All First 1 of 2 Last

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

Proposed

Tenure Status: Not on Trk Acad Rank: []

Title: Professor FTE: 1.00

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

☐ Outside Offer Details: []

☐ Forward Case Portfolio

Notes/Portfolio Description: []

Case Review page

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

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

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

Proposed

Acad Rank (academic rank) Select the proposed academic rank.

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

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

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

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

Reviewing Information From Specific Reviewers

Access the Review Path page.

Review Path		ID: PU018	
Niles, William		Annual Rate: 40000.000	
Tenure/Home Dept:	PSU5306 Electrical Engineering	Tenure Status:	On Track
Academic Rank:	Professor	Case Status:	Disapprove
Case ID:	P001	Case Type:	Title
Recommendation View All First 1 of 2 Last			
*Review Dept:	PSU5306 Electrical Engineering	*Step:	2
Reviewer EmplID:			
Reviewer Team:	Board of Directors		
Case Received Date:	06/01/1998	Recommendation Date:	06/01/1998
Recommendation:	Disapprove	Forwarded Date:	06/01/1998
Forward Department:	PSU5306 Electrical Engineering		
Notes:	Final Action ☒ Next Case Type: Tenure	Next Review Date:	12/01/1998

Review Path page

Annual Rate

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

Recommendation

Review Dept (review department)

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

Step

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

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

Reviewer EmplID (reviewer employee identification)

Select the employee ID of the person reviewing the case.

Reviewer Team

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

Case Received Date

Enter the date the reviewer received the case.

Recommendation Date

Enter the date the reviewer made the recommendation.

Recommendation

Select the proposed action for the case. For example, select **Approve** to indicate the reviewer approves the request for tenure.

Forwarded Date

If this is not the final step in the review process, enter the date you forward the case to the next reviewer.

Forward Department

If this is not the final step in the review process, select the department to which you forwarded the case.

Final Action

Select if this is the last reviewer of the case.

Next Case Type and Next Review Date

These fields become available if the **Final Action** check box is selected. Select the next type of case that you anticipate for this employee, and enter the next review date.

CHAPTER 5

(CAN) Working with the Statistics Canada Academic Teaching Surveys Process

In this chapter, we provide an overview of the Statistics (Stats) Canada (Can) Academic Teaching Surveys business process and discuss how to:

- Set up the Statistics Canada Academic Teaching Surveys business process tables.
- Load and modify data in the Full-Time Academic Teaching Member Table.
- Load data into the Academic Teaching Survey Tables.
- View and modify survey results.
- Create the survey report flat files that you send to Statistics Canada.
- Verify the survey results with Statistics Canada.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, “Appendix: PeopleSoft Application Fundamentals for HRMS Reports,” Track Faculty Events Reports

Understanding the Statistics Canada Academic Teaching Surveys Business Process

Statistics Canada requires that all Canadian universities and degree-granting institutions produce full-time (FT) and part-time (PT) Academic Teaching Survey reports. These reports are a legislative requirement. Track Faculty Events business process provides the functionality to create these reports by associating PeopleSoft HRMS information with Statistics Canada codes.

Before you create academic teaching surveys, you must set up some other HRMS tables.

Setting Up PeopleSoft HRMS Control Tables

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

- Department Table: StatsCan - Dept (Statistics Canada department) and StatsCan - Faculty.

Maintain StatsCan Faculty values in the Faculty Code Table.

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

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

- Canadian Tax Table: Stats Can Province Code.

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

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

Setting Up Track Faculty Events Tables

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

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

Setting Up the Statistics Canada Academic Teaching Surveys Business Process

In this section, we discuss how to:

- Maintain principal subjects taught codes.
- Define faculty codes.
- Identify nonoperational funding sources.

- Maintain report period dates and parameters.

Pages Used to Set Up the Canadian Teaching Surveys Business Process

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Principal Subjects Taught	HP_STATS_SUBJECTS	Develop Workforce, Manage Faculty Events, Setup, Principal Subjects Taught, Principal Subjects Taught	Maintain Statistics Canada principal subjects taught codes and descriptions.
Faculty Code Table	HP_STATS_FACULTY	Develop Workforce, Manage Faculty Events, Setup, Stats-Can Faculty Code Table, Faculty Code Table	Store information regarding faculty codes. The Department Table references this table to associate a faculty with a department.
Non-Operational Funds Table	HP_NON_OP_FUNDS	Define Business Rules, Define Commit Accounting(CAN), Setup, Non-Operational Funds Table, Non-Operation Funds Table	Identify nonoperational funding sources. This table is for Ontario universities only.
Reporting Period Table	HP_RPTNG_PRD_PNL	Develop Workforce, Manage Faculty Events, Setup, Stats-Can Reporting Period, Reporting Period Table	Create and maintain report period dates and parameters for the survey run controls. Update the reporting period each reporting year.

Maintaining Principal Subjects Taught Codes

Access the Principal Subjects Taught page.

Principal Subjects Taught

Stats-Can Acad Teaching Survey

Principal Subject Taught Code: 13803

***Description:** Education Psychology

Short Description: Educ Psych

Principal Subjects Taught page

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

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

Defining Faculty Codes

Access the Faculty Code Table page.

Faculty Code Table

Stats-Can Acad Teaching Survey

Faculty Code: ENG

***Description:** Engineering

Short Description: Eng

***Medical/Dental Category:** Not Applicable

Faculty Code Table page

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

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

Identifying Non-Operational Funding Sources

Access the Non-Operation Funds Table page.



Non-Operation Funds Table

Non-Operation Fund Account: 000000013 Faculty Salaries

Stats-Can Acad Teaching Survey

*Status: Active

Non-Operation Funds Table page

Non-Operation Fund Account	Enter an account code. The system uses the nonoperational fund account and the account code on the Job Earnings Distribution page to calculate the salary source for each employee in the FT survey report.
-----------------------------------	---

Maintaining Report Period Dates and Parameters

Access the Reporting Period Table page.

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

Reporting Period Table page

For Full-Time Survey

Start Date and End Date

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

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

HR Action/Categories

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

Select the human resources (HR) categories that represent sabbatical, workload reduction, other paid leave, or unpaid leave. This determines how the system counts HR actions that fall into these categories when creating the survey.

FT Filename

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

For Part-Time Survey

Start Date and End Date

Enter the start date of the report period for the PT survey.

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

PT Filename

Enter the name of the FT survey report flat file.

Note. Use the Statistics Canada Academic Teaching Employment Table on the Employment Data – Employment Information page to associate Statistics Canada codes and other required information with your employees' records.

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce,"
Entering Optional Employment-Related Data

Loading and Modifying Data in the FT Academic Teaching Member Table

In this section, we provide an overview of the Load FT Teaching Member Data process and discuss how to:

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

Understanding the Load FT Teaching Member Data Process

Before you create the FT survey report, populate the FT Academic Teaching Member Table using the Load FT Member Data process (HPH900CN.SQR). You can modify information in this table to control the results that you report to Statistics Canada. For example, you can add and delete teaching member records, or you can modify records for more accuracy. However, you cannot delete a teaching member record if the employee has a matching record in the FT Academic Teaching Survey Table.

The Load FT Teaching Member Data process captures data for regular and temporary FT employees with a job record prior, or equal, to October 1 of the reporting year and a job record in the Statistics Canada Academic Employment Teaching Table (located on the Employment Data – Employment Information page). Employees without records in the FT Academic Teaching Member Table for the year being reported do not appear in the FT survey report.

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

PT employees do not have a corresponding table.

Important! The first time you use the Statistics Canada Academic Teaching Surveys business process, you must load your prior year's data into the system. The current year's report derives some information from the previous year's report.

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

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Load FT Teaching Member Data	RUNCTL_HPH900CN	Develop Workforce, Manage Faculty Events, Process, Load FT Teaching Member Data, Load FT Teaching Member Data	Load teaching member data into the FT Academic Teaching Member Table.
Member Data	HP_FT_TEACH_MEMBER	Develop Workforce, Manage Faculty Events, Use, FT Academic Teaching Member, FT Academic Teaching Member	Modify teaching member records to control the survey results. When you insert a new row on this page, the default field values are from the previous reporting year (except for the Reporting Year field).

Loading Teaching Member Data

Access the Load FT Teaching Member Data page.

Load FT Teaching Member Data

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

Reporting Period: 1999

Start Date: 01/08/1999

End Date: 01/07/2000

Load FT Teaching Member Data page

Before using this page, set up the Statistics Canada Academic Teaching Employment Table on the Employment Data – Employment Information page.

Reporting Period

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

Maintain reporting periods on the Reporting Period page.

Start Date and End Date

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

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

Maintain start dates on the Reporting Period page.

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, “Hiring Your Workforce,” Entering Employee Job Location Information

Maintaining Teaching Member Records

Access the Member Data page.

Member Data

Trudeau, Susan Employee ID: KC0007

View All First 1 of 1 Last

*Reporting Year: + -

Reportable Employment Rcd Nbr:

Canadian Resident Status ☒ Visiting Faculty ☐

*Previous Employment:

Previous Employment Province: Stats-Can Province Code:

*Previous Employment Country: Stats-Can Country Code: 80021

*Salary Status:

Member Data page

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

Reporting Year

Displays the year of the data that appears in the survey. If you manually add a new teaching member record, you must enter the reporting year.

Reportable Employment Rcd Nbr (reportable employment record number)

Enter the number of the employment record for the primary FT job being reported. If you loaded the information for this teaching member using the Load FT Teaching Member Data page, this value comes from the Statistics Canada Academic Teaching Employment Table on the Employment Data – Employment Information page.

Canadian Resident Status	Select this check box if the employee had Canadian resident status at the time of job offer.
Visiting Faculty	Select this check box if the employee is a visiting faculty member.
Previous Employment Province	If the country of the employee's previous employment is Canada, select the province of previous employment.

Loading Data Into the Academic Teaching Survey Tables

In this section, we provide an overview of the Load Teaching Survey Data process and discuss how to load:

- FT survey data.
- PT survey data.

Understanding the Load Teaching Survey Data Process

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

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

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

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

Conditions for FT Survey Data

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

- Has a record in the FT Academic Teaching Member Data Table for the reporting year. The employee's job can span the entire reporting year, or it can begin during the reported year. Employees who do not have a teaching member record do not appear in the FT survey report.
- Was employed on October 1 of the reporting year.

- Has a Statistics Canada reporting job (the value of the Survey Report Flag field in the Statistics Canada Academic Teaching Employment Table on the Employment Data – Employment Information page is **FT** or **Both**).

Conditions for PT Survey Data

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

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

Pages Used to Load Data Into the Academic Teaching Survey Tables

Page Name	Object Name	Navigation	Usage
Load Teaching Survey Data - FT Survey	RUNCTL_HPH901CN	Develop Workforce, Manage Faculty Events, Process, Load Teaching Survey Data, Load FT Survey Data	Load FT survey data for each FT employee who qualifies. Before using this page, complete the Member Data Table for all FT teaching members in the survey.

Page Name	Object Name	Navigation	Usage
Load Teaching Survey Data - PT Survey	RUNCTL_HPH902CN	Develop Workforce, Manage Faculty Events, Process, Load Teaching Survey Data, Load PT Survey Data	Load PT survey data for each PT employee who qualifies. Before using this page, set up the Statistics Canada Academic Teaching Employment Table on the Employment Data – Employment Information page.

Common Elements Used in This Section

Reporting Period	Displays the year of the data to load into the FT or PT Academic Teaching Survey Tables.
Start Date and End Date	Displays the start and end dates of the employment year used to assess twelve months of employment and compensation amounts. The system calculates the end date to be one day less than a year from the start date.
EmplID (employee identification)	Enter an employee ID to create an Academic Teaching Survey record for a specific employee.

Loading FT Survey Data

Access the Load Teaching Survey Data - FT Survey page.

FT Survey
PT Survey

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

Reporting Period: 1999

Start Date: 01/08/1999

End Date: 01/07/2000

EmplID:

HR Action/Categories

Sabbatical:	CAT_PSB
Workload Reduction:	CAT_PAY
Unpaid Leave:	CAT_LOA
Other Paid Leave:	CAT_PLA_SC

Administrative Stipend Earnings Codes
View All
First 1 of 1 Last

Earnings Code	Description
1	

Load Teaching Survey Data - FT Survey page

Sabbatical, and Workload Reduction, and Unpaid Leave, and Other Paid Leave Displays the HR action and category from 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.

Viewing and Modifying Survey Results

In this section, we discuss how to view:

- FT survey results (parts 1 and 2).
- PT survey results (parts 1 and 2).

Pages Used to View and Modify Academic Teaching Survey Results

Page Name	Object Name	Navigation	Usage
FT Academic Teaching Surveys - FT Survey Part 1	HP_FT_SURVEY_PN L1	Develop Workforce, Manage Faculty Events, Use, FT Academic Teaching Surveys, FT Teaching Survey Part 1	View survey results for each FT employee. Before using this page, set up the Load Teaching Survey Data – FT Survey page.

Page Name	Object Name	Navigation	Usage
FT Academic Teaching Surveys - FT Survey Part 2	HP_FT_SURVEY_PN L2	Develop Workforce, Manage Faculty Events, Use, FT Academic Teaching Surveys, FT Teaching Survey Part 2	View survey results for each FT employee. You can also modify some survey information, but it is better to modify the fields at the source of the data and re-create the surveys.
PT Academic Teaching Surveys - PT Survey Part 1	HP_PT_SURVEY_PN L1	Develop Workforce, Manage Faculty Events, Use, PT Academic Teaching Surveys, PT Teaching Survey Part 1	View survey results for each PT employee. Before using this page, set up the Load Teaching Survey Data – PT Survey page.
PT Academic Teaching Surveys - PT Survey Part 2	HP_PT_APPNTMNT_PNL	Develop Workforce, Manage Faculty Events, Use, PT Academic Teaching Surveys, PT Teaching Survey Part 2	View and modify survey results for each PT employee.

Common Elements Used in This Section

Reporting Year	Maintain reporting periods on the Reporting Period Table page.
Level of Highest Degree	Displays the Statistics Canada degree level from the Professional Ed. and Training page. Maintain degree levels in the Degree Table.
Year of Highest Degree	Displays the year the employee received his or her highest degree from the Professional Ed. and Training page.

Viewing FT Survey Results (Part 1)

Access the FT Academic Teaching Surveys - FT Survey Part 1 page.

FT Survey Part 1		FT Survey Part 2	
Niles, William		Employee	
		ID: PU018	
View All First ◀ 1 of 1 ▶ Last			
Reporting Year:	1999		
Gender:	Male	Year of Birth:	1973
Year of Appointment:	1999	Previous Employment Location:	04623
Reporting Institution:	590111	Previous Employment:	Military
Stats-Can Dept Code:	777	Principal Subject:	Other Applied Arts
Degree Earned			
Year of First Degree:	9998	Level of Highest Degree:	No Degree/Diploma/Prof.Desgntn
Province of First Degree:	99899	Year of Highest Degree:	9998
		Province of Highest Degree:	99899
Stats-Can Citizenship Country Code:	99999	Immigrtn Status:	Unknown

FT Academic Teaching Surveys - FT Survey Part 1 page

Year of Appointment	Displays the first year the employee appeared in the survey report. If the employee was not reported for a year or more, this field displays the first year the employee resumed reporting.
Reporting Institution	Displays the Statistics Canada reporting institution from the Company Table.
Stats-Can Dept Code	Displays the Statistics Canada code associated with the department of the primary reported job from the Department Table.
Previous Employment Location	Displays the employee's previous employment location from the Member Data page.
Previous Employment	Displays the employee's previous employment from the Member Data page.
Degree Earned	
Year of First Degree	Displays the year the employee received his or her first degree from the Professional Ed. and Training page.
Province of First Degree	Displays the province in which the employee received his or her first degree from the Professional Ed. and Training page.
Province of Highest Degree	Displays the province in which the employee received his or her highest degree from the Professional Ed. and Training page.
Stats-Can Citizenship Country Code	Displays the Statistics Canada citizenship country code associated with the employee's country of citizenship from the Citizenship/Passport page.
	Maintain country codes in the Country Table.

Immigrtn Status
(immigration status)

Displays the employee's immigration status from the Membership Data page.

Viewing FT Survey Results (Part 2)

Access the FT Academic Teaching Surveys - FT Survey Part 2 page.

FT Survey Part 1		FT Survey Part 2	
Niles, William		Employee ID: PU018	
View All First 1 of 1 Last			
Reporting Year:	1999		
Stats-Can Rank:	Full Professor		
Stats-Can Responsibility:	Teaching - No other adm duties		Medical/Dental Category: Not Applicable
Year of Appointment to Rank:	1999	Type of Appointment: Non-Vstng Tchg Mbr Non-Tenured	
Salary Earned			
Actual Salary:	27670	Annual Salary:	20752 Salary Status: Regular
Administrative Stipends:		9 Months Not On Leave	
Ontario Final Rate of Salary:		Months On Sabbatical	Last Load Date: 06/01/2000
Ontario Salary Source:	00	Months On Other Paid Leave	Last Date Changed: 06/01/2000
Percentage of Load Reduction:		3 Months On Unpaid Leave	Last Date Reported:
12 Total Months			

FT Academic Teaching Surveys - FT Survey Part 2 page

Stats-Can Rank

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

Stats-Can Responsibility

Displays the Statistics Canada responsibility from the duties in the Statistics Canada Academic Teaching Employment Table on the Employment Data – Employment Information page.

Year of Appointment to Rank

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

Type of Appointment

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

Salary Earned**Actual Salary**

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

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

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

Annual Salary

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

Salary Status

Displays the salary status from the Member Data page.

Administrative Stipends

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

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

Ontario Final Rate of Salary

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

Ontario Salary Source

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

Percentage of Load Reduction

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

The system calculates this value as follows:

$$\frac{\text{Job Data std hrs}}{\text{Job Code std hrs}} \times \frac{\text{\# reduced workload decimal months}}{\text{\# decimal months in appointment}}$$

Months On Sabbatical, Months On Other Paid Leave, and Months On Unpaid Leave

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

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce," Entering Optional Employment-Related Data

Viewing PT Survey Results (Part 1)

Access the PT Academic Teaching Surveys - PT Survey Part 1 page.

PT Survey Part 1		PT Survey Part 2	
Catherwood, Elizabeth		Employee	
		ID: TFCAT10	
		View All First 1 of 2 Last	
Reporting Year:	1997		
Gender:	Female	Year of Birth:	1946
☒ Bargaining Agent			
Degree Earned			
Level of Highest Degree:	No Degree/Diploma/Prof.Desgntrn		
Year of Highest Degree:	9898		
Number of Appointments To Be Reported: 3		Last Load Date:	07/12/2000
		Last Date Changed:	
		Last Date Reported:	07/12/2000

PT Academic Teaching Surveys - PT Survey Part 1 page

Bargaining Agent

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

Degree Earned**Number of Appointments To Be Reported**

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

Viewing PT Survey Results (Part 2)

Access the PT Academic Teaching Surveys - PT Survey Part 2 page.

PT Survey Part 1		PT Survey Part 2	
Catherwood, Elizabeth		Employee ID: TFCAT10	
Reporting Year: 1997		View All First 1 of 2 Last	
Employment Rcd Nbr: 0		View All First 1 of 3 Last	
Work Duration Start Date: 09/01/1997		End Date: 11/30/1997	
Appointment Status: FT Appointment < 12 Months			
Type of Appointment: Duties Code <= 10			
Principal Subject:			
Salary Paid: 80000		Stats-Can Teaching Load:	
		Full-Time Teaching Equivalent:	

PT Academic Teaching Surveys - PT Survey Part 2 page

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

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

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

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

Appointment Status Displays the employee's appointment status from the Job Data component:

1: FT appointment working less than 12 months in the reporting period.

2: PT appointment.

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

Type of Appointment Displays the type of appointment, based on the tenure status on the Tenure Data page and the duties in the Statistics Canada Academic Teaching Employment Table on the Employment Data – Employment Information page.

Principal Subject	Displays the principal subject taught by the employee from the Statistics Canada Academic Teaching Employment Table on the Employment Data – Employment Information page. This is the Principal Subject taught as of the appointment end date.
Salary Paid	Displays the salary paid, based on the compensation and Job Earnings Distribution information from the reporting year. The salary paid amount includes contracts, leaves, and reduced workloads. The system uses decimal months to calculate salary paid, which may result in skewed figures. You can modify this field.
Stats Can Teaching Load	Displays the employee's Statistics Canada teaching load from the Statistics Canada Academic Teaching Employment Table on the Employment Data – Employment Information page.
Full-Time Teaching Equivalent	Displays the employee's FT teaching equivalent from the Statistics Canada Academic Teaching Employment Table on the Employment Data – Employment Information page.

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, “Hiring Your Workforce,”
 Entering Optional Employment-Related Data

Creating the Survey Report Flat Files

In this section, we discuss how to create:

- FT Survey Report files.
- PT Survey Report files.

Pages Used to Create the Survey Report Flat Files

Page Name	Object Name	Navigation	Usage
Create Stats-Canada Survey - FT Report File	RUNCTL_HPH903CN	Develop Workforce, Manage Faculty Events, Process, Create Stats-Canada Survey, FT Report File	Create the FT survey report flat file.

Page Name	Object Name	Navigation	Usage
Create Stats-Canada Survey - PT Report File	RUNCTL_HPH903CN	Develop Workforce, Manage Faculty Events, Process, Create Stats-Canada Survey, FT Report File	Create the PT survey report flat file.

Common Elements Used in This Section

Reporting Period	Displays the year of the data to load into the FT or PT survey report flat files. Maintain reporting periods on the Reporting Period page.
Start Date	Displays the start and end dates of the employment year used to assess twelve months of employment and compensation amounts. The system calculates the end date to be one day less than a year from the start date. Maintain start dates on the Reporting Period page.
Output File Name	Displays the name of the survey report flat file from the Reporting Period page.

Verifying Survey Results With Statistics Canada

After you submit your FT and PT survey report flat files to Statistics Canada, you receive a summary report. Use the StatsCan FT Survey Report page to compare your results with Statistics Canada's summary.

CHAPTER 6

(AUS) DETYA Reporting for the Australian Higher Education Sector

This chapter provides an overview of the Department of Education, Training and Youth Affairs (DETYA) reporting process and discusses how to:

- Set up DETYA reporting codes.
- Generate electronic files for DETYA reports.

Understanding DETYA Reporting

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

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

Understanding DETYA Calculations and Reference Dates

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

Full-Time Staff

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

Fractional Staff

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

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

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

Casual Staff

The calculations for full-time equivalence for a full year for a member of staff or group of members of staff with a casual work contract depend on the job function. These legislative guidelines should be followed to determine what full-time employee (FTE) data to enter for each staff member. This information is entered on the Job Data - Job Information page.

Job Function - Lecturing

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

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

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

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

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

Setting Up DETYA Reporting Codes

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

Pages Used to Set Up DETYA Reporting Codes

Page Name	Object Name	Navigation	Usage
Classification Codes	DETYA_CLSN_AUS	Develop Workforce, Manage Faculty Events, Setup Lcl, AUS Classification Codes	Define classification codes specific to DETYA reporting.
Organization Unit	DETYA_ORGUNIT_ AUS	Develop Workforce, Manage Faculty Events, Setup, Lcl, AUS Organization Unit	Define organizational units specific to DETYA reporting.

Maintaining Classification Codes

Access the Classifications Codes page.

Classification Codes

Job Classification: 123

Australia Higher Education Classification Codes.
View All
First
1 of 1
Last

Effective Date:
09/26/2001

*Status:
Active

*Description:

Short Description:

*Classification Group Code:

Classification Codes

Classification Group Code

Select the appropriate classification group corresponding to the code being defined. The group code defines the level of work being performed. DETYA defines these groups and the corresponding codes. The choices are:

- *Abv Sr Lec* (above senior lecturer)
- *Level A*
- *Level B*
- *Level C*
- *Non Acad* (nonacademic)

Generating DETYA Reports Data

DETYA guidelines require reports to be submitted annually by June 26. These reports gather information about staff from the department data and job data components.

Pages Used to Generate DETYA Reports

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
AUS - DETYA Data Generation	DETYA_PROCESS	Develop Workforce, Manage Faculty Events, Process Lcl, AUS DETYA Data Generation	Generate the permanent and casual DETYA data. This process saves the data to a temporary table. The details can be viewed or modified on the DETYA Inquiry page. Select the end date for the report.
AUS – DETYA File Creation	DETYA_FILE	Develop Workforce, Manage Faculty Events, Process Lcl, AUS - DETYA File Creation	Generate the electronic file for the Permanent or Casual report after running the data generation process. Confirm that the correct report is running. After running the report, review the error log. Use the DETYA Inquiry page to make any changes.

Page Name	Object Name	Navigation	Usage
DETYA Inquiry	DETYA_PRCs_INQ	Develop Workforce, Manage Faculty Events, Inq Lcl, AUS - DETYA Inquiry	Update DETYA reporting information by individual employees, by employee ID, employee record number, or name. Changes made to this page will be picked up by the DETYA File Creation process but not updated at the employee level (for example, job, personal data, or education). If any changes are made to this page, the DETYA File Creation process needs to be re-run.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, “Appendix: PeopleSoft Application Fundamentals for HRMS Reports,” Administer Workforce Reports

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