



PeopleSoft 8.3 Human  
Resources PeopleBook: Track  
Flexible Service

PeopleSoft 8.3 Human Resources PeopleBook: Track Flexible Service

SKU HRr83HTF-B 1001

**PeopleBooks Contributors:** Teams from PeopleSoft Product Documentation and Development.

Copyright © 2002 PeopleSoft, Inc. All rights reserved.

Printed in the United States.

All material contained in this documentation is proprietary and confidential to PeopleSoft, Inc. ("PeopleSoft"), protected by copyright laws and subject to the nondisclosure provisions of the applicable PeopleSoft agreement. No part of this documentation may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, including, but not limited to, electronic, graphic, mechanical, photocopying, recording, or otherwise without the prior written permission of PeopleSoft.

This documentation is subject to change without notice, and PeopleSoft does not warrant that the material contained in this documentation is free of errors. Any errors found in this document should be reported to PeopleSoft in writing.

The copyrighted software that accompanies this document is licensed for use only in strict accordance with the applicable license agreement which should be read carefully as it governs the terms of use of the software and this document, including the disclosure thereof.

PeopleSoft, the PeopleSoft logo, PeopleTools, PS/nVision, PeopleCode, PeopleBooks, *PeopleTalk*, and Vantive are registered trademarks, and "People power the internet." and Pure Internet Architecture are trademarks of PeopleSoft, Inc. All other company and product names may be trademarks of their respective owners. The information contained herein is subject to change without notice.

# Contents

## About the HRMS PeopleBooks

Before You Begin.....	vii
PeopleSoft Application Fundamentals for HRMS PeopleBook.....	vii
Related Documentation .....	viii
Documentation on the Internet.....	viii
Documentation on CD-ROM.....	viii
Hardcopy Documentation .....	viii
PeopleBooks Standard Page Element Definitions.....	ix
PeopleBook Standard Group Boxes .....	xii
Entering Name Information .....	xii
Entering Address Information.....	xiv
Entering or Viewing Pay Components.....	xv
Required Fields on Pages .....	xvii
Typographical Conventions and Visual Cues .....	xvii
Process Introductory Table.....	xviii
USF U.S. Federal Government Functionality.....	xix
E&G Education and Government Functionality.....	xix
Local Country Functionality.....	xix
Comments and Suggestions.....	xix

## Chapter 1

### About the PeopleSoft 8.3 Human Resources PeopleBook: Track Flexible Service

PeopleBooks Standard Page Element Definitions.....	1-1
Understanding the Documentation .....	1-2
Human Resources Reports .....	1-3

## Chapter 2

### Establishing Flexible Service Defaults

Understanding Flexible Service.....	2-1
Setting Up Service Parameters .....	2-1
Setting Up Service Accrual Control Tables .....	2-2
Setting Flexible Service Tracking Defaults.....	2-2
Setting Up the Position Data Table.....	2-3
Setting Up the Job Code Table .....	2-3

## Chapter 3

### Assigning an Employee to a Calculation Group

Understanding Calculation Groups.....	3-1
Selecting a Calculation Group .....	3-1
Entering Startup Credits and Exceptions .....	3-2
Page Used to Enter Startup Credits and Exceptions.....	3-3
Entering Startup Credits .....	3-3
Reviewing Related Jobs for Flexible Service .....	3-5
Page Used to Review Credit Accrual .....	3-5
Reviewing Flexible Service Credits .....	3-5

## Chapter 4

### Calculating Flexible Service and Viewing Results

Understanding Calculating Flexible Service .....	4-1
Understanding Processing Modes .....	4-2
Running the Flexible Service Calculation Process .....	4-3
Page Used to Run the Flexible Service Calculation Process.....	4-4
Specifying Time Periods and Calculation Groups .....	4-4
Understanding How the Calculation Process Works .....	4-6
Viewing Flexible Service Calculation Results .....	4-7
Pages Used to View Flexible Service Calculation Results .....	4-7
Reviewing the Message Log and Periodic Results .....	4-8
Reviewing Normal Run Results .....	4-8
Viewing Service History Information .....	4-9
Viewing Service Detail Information .....	4-11

## Index

# 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](http://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:

<b>Internet</b>	From the main PeopleSoft Internet site, go to the Documentation section of Customer Connection. You can find order information under the Ordering PeopleBooks topic. Use a Customer Connection ID, credit card, or purchase order to place your order.  PeopleSoft Internet site: <a href="http://www.peoplesoft.com">http://www.peoplesoft.com</a> .
<b>Telephone</b>	Contact Consolidated Publishing Incorporated (CPI) at <b>800 888 3559</b> .
<b>Email</b>	Email CPI at <a href="mailto:callcenter@conpub.com">callcenter@conpub.com</a> .

## 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.

<b>Field</b>	<b>Definition</b>
<b>Address 1, Address 2, Address 3</b>	Freeflow text entry fields that enable you to describe street, street number, apartment number, and other address information.
<b>As of Date</b>	The last date for which a report or process includes data.
<b>Block (Bloque)</b>	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.
<b>Business Unit</b>	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.
<b>City</b>	Name of city for address.
<b>Comment(s)</b>	Freeflow text entry that enables you to add comments.
<b>Company</b>	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.

<b>Field</b>	<b>Definition</b>
<b>Country</b>	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.
<b>County (also Prefecture and Parish)</b>	Name of county (prefecture/parish) for address, if applicable.
<b>Currency Code</b>	The 3-letter code in which the currency is specified.
<b>Description</b>	Freeflow text up to 36 characters that describes what you are defining.
<b>Department</b>	An identification code that represents an organization in a company.
<b>Door (Puerta)</b>	In Spanish addresses, identifies the door name or number.
<b>Effective Date</b>	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.
<b>Email</b>	The email address for a person or organization.
<b>EmplID (employee ID)</b>	Unique identification code for an individual associated with your organization.
<b>Empl Rcd# (Employee Record Number)</b>	A system-assigned number that indicate an employee has more than one record in the system.
<b>Fax (also Fax Number)</b>	The fax number for a person or organization.
<b>Floor (Piso)</b>	In Spanish addresses, identifies the floor name or number.
<b>House</b>	Identifies the type of house.
<b>Initials</b>	Initials of individual.
<b>Language</b>	Language spoken by employee/applicant/non-employee.
<b>Language or Language Code</b>	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.
<b>Last Run On</b>	The date that a report or process was last run.
<b>Locality</b>	A tax location within an organization.
<b>Name</b>	Name of individual.

<b>Field</b>	<b>Definition</b>
<b>National ID</b>	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.
<b>Number</b>	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.
<b>Phone</b>	The phone number for a person or organization.
<b>Phone Extension</b>	The phone extension number for a person or organization.
<b>Phone Type</b>	Identifies the type of phone number entered in the Telephone field. Valid values are <b>Business, Campus, Cellular, Dormitory, FAX, Home, Other, Pager 1, Pager 2,</b> or <b>Telex.</b>
<b>Post Code (also Postal)</b>	Postal code for address.
<b>Prefix</b>	Prefix for individual (such as Mr., Ms., Mrs., Dr., and so on)
<b>Process Frequency group box</b>	Designates the appropriate frequency in the <b>Process Frequency</b> group box:  <b>Once</b> executes the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to <b>Don't Run</b> .  <b>Always</b> executes the request every time the batch process runs.  <b>Don't Run</b> ignores the request when the batch process runs.
<b>Process Monitor</b>	This button takes you to the Process List page, where you can view the status of submitted process requests.
<b>Regulatory Region</b>	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.
<b>Report ID</b>	Identifies a report.
<b>Report Manager</b>	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).
<b>Request ID</b>	A request identification that represents a set of selection criteria for a report or process.
<b>Run</b>	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.

<b>Field</b>	<b>Definition</b>
<b>Run Control ID</b>	Identifies specific run control settings for a panel.
<b>Run Date</b>	The date that a process was run or a report was generated.
<b>Run Time</b>	The time that a process was run or a report was generated.
<b>SetID</b>	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.
<b>Short Description</b>	Freeflow text up to 15 characters.
<b>Stair (Escalera)</b>	In Spanish addresses, identifies the stair name or number.
<b>State (also Province)</b>	State (Province) for address.
<b>Status</b>	Indicates whether a row in a table is <i>Active</i> or <i>Inactive</i> .
<b>Street Type</b>	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.
<b>Telephone (Phone)</b>	The telephone number for a person or organization.
<b>User ID</b>	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.

<b>Title</b>	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.
<b>Prefix and Name Prefix</b>	Select a Prefix or Name Prefix, if applicable.
<b>Royal Prefix</b>	Select a Royal Prefix, if applicable.
<b>First Name</b>	Enter the employee's official first name.
<b>Preferred First Name</b>	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.
<b>Last Name Preference</b>	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.
<b>Middle</b>	Enter the employee's middle name, if applicable.
<b>Last Name</b>	Enter the employee's official last name.
<b>Suffix</b>	Select a suffix, if applicable.
<b>Second Last Name</b>	For Spanish employees, enter the second surname (mother's surname).
<b>Alternate Character Name</b>	Use this field to enter the employee's name using alternate characters (such as Japanese phonetic characters).  <b>Note.</b> 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.  <b>Warning!</b> Be sure to select the correct character set on the Installation Table – Alternate Characters page. Using the wrong character set generates an error message.
<b>Royal Suffix</b>	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.
<b>Name</b>	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:	ツムラトモノ
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.

<b>Country</b>	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.
<b>Address 1, Address 2, Address 3, and Address 4</b>	Freeflow text entry fields that enable you to describe street, street number, apartment number, and other address information.
<b>City</b>	Enter the city.
<b>County</b>	Enter the county, if applicable.
<b>State (State, Province, or other)</b>	Enter the state or province.
<b>Postal</b>	Enter the postal, such as zip or postal code.
<b>Number 1, and Number 2</b>	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.

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

---

## Entering or Viewing Pay Components

### Amounts Tab

### Pay Components - Amounts

<b>Rate Code</b>	Rate codes are IDs for pay components. The system inserts any compensation information associated with this rate code in the compensation grid.  <b>Note.</b> 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.
<b>Seq (sequence)</b>	The sequence number of the rate code if it is used more than once.
<b>Details</b>	Click the <b>Details</b> button to open the Comp Rate Code Secondary Panel page.
<b>Comp Rate</b> , (compensation rate) <b>Currency</b> , and <b>Frequency</b>	The compensation rate, its currency, and the frequency (for example, annually, weekly, or hourly) the comp rate will be paid.
<b>Apply FTE</b>	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 <b>Percent</b> rate codes.
<b>Points</b>	The salary points associated with this rate code, if any.
<b>Percent</b>	If the rate code rate type is <b>Percent</b> , 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.
<b>Rate Code Group</b>	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	<input type="checkbox"/>	0.000000		0.000	<input type="button" value="+"/>	<input type="button" value="-"/>		

**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	<input type="checkbox"/>	<input type="checkbox"/>				

### Pay Components – Conversion

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

<b>Source</b>	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> .
<b>Default Without Override</b>	Selected if the worker's compensation package cannot be manually updated on the Job Data – Compensation page.
<b>Apply FTE</b>	Indicates if the converted rate code value will be multiplied by the FTE factor for annualization and deannualization.
<b>Converted Comp Rate</b>	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.

<b>*Description:</b>	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**).

*Italics* Indicates a PeopleSoft or other book-length publication. We also use italics for *emphasis* and to indicate specific field values. When we cite a field value under the page on which it appears we use this style: *field value*.

We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number *0*, not the letter *O*.

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 PeopleBook: Track Flexible Service

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

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.

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

<b>Field</b>	<b>Definition</b>
<b>Deduction</b>	Any amount taken from an employee's pay check to offset all or part of the cost of the employee's benefits.
<b>Deduction Code</b>	The code assigned to a benefit deduction.
<b>FSA Maximum Annual Pledge</b>	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.
<b>FSA Minimum Check Amount</b>	This is the minimum amount for which a check will be printed.
<b>Plan Type</b>	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

# Establishing Flexible Service Defaults

This chapter gives an overview of the Manage Flexible Service business process in PeopleSoft Human Resources and discusses how to:

- Set up service parameters.
- Set up service accrual control tables.
- Set flexible service tracking defaults.

## Understanding Flexible Service

The Manage Flexible Service business process enables you to track your service types based on complex rules that you set up based on your own organizational needs. You define service dates, service types, and calculation rules to associate with each service type.

Manage Flexible Service enables you to track employees' service credits by job, stagger the service type start dates, prorate service credits based on your full-time equivalent count, and prorate service credits based on job action or reasons.

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

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

## Setting Up Service Parameters

The Maintain Service Parameters menu contains pages that enable you to define basic parameters such as how a date should be rounded, how a raw date should be converted to a decimal date, and how to calculate a year. In addition, you can:

- Configure the system to use a certain number of days per month or to 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 during a calculation 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. The Administer Flexible Service functionality provides setup tables where you establish the service rules that best fit your organization. These service rules provide the basis for flexible service accrual processing.

You can:

- Define service calendars.
- Establish HR action/categories to categorize the job action and job reason codes that count toward service accrual.
- Define date-rounding options.

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

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

The setup tables that you use to establish service accrual rules are shared with the Tracking Tenure feature.

**See Also**

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

## Setting Flexible Service Tracking Defaults

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

Set defaults on the Position Data Table and the Job Code Table to associate a position, a job code, or both with a calculation group. By doing this, you provide a default calculation group for all employees assigned to that position or job code.

---

## Setting Up the Position Data Table

If you are using the Manage Positions business process, you can assign a default service calculation group at the position level.

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

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

To provide the default for flexible service tracking to the Position Data Table, select the Calc Group (Flex Service) [calculation group (flexible service)] for which you want accrued service automatically applied on the Position Data – Specific Information page.

### **See Also**

*PeopleSoft Human Resources PeopleBook: Manage Positions*, “Managing Positions,” Maintaining Position Data

---

## Setting Up the Job Code Table

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

By doing this, you associate all employees assigned to a job code with the default calculation group. The calculation group populates the employee's employment record—first from the Position Data Table, if present, and then from the Job Code Table.

Set default calculation groups at the job code level on the Job Code Table – Evaluation Criteria.

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

### **See Also**

*PeopleSoft Application Fundamentals for HRMS PeopleBook*, “Setting Up Jobs and Pay Groups,” Classifying Jobs



## CHAPTER 3

# Assigning an Employee to a Calculation Group

This chapter gives an overview of calculation groups and explains how to:

- Select a calculation group.
- Enter startup credits and exceptions.
- Review related jobs for Flexible Service.

## Understanding Calculation Groups

To accrue service credits, an employee must be assigned to a calculation group on the employment record, in the Job Data component. Service accrues separately for each concurrent job the employee has.

However, belonging to a service calculation group does not necessarily qualify an employee to accrue credits for a particular service type. Other factors are the eligibility criteria for the service type (full time, part time, and so on) and the job action or reason codes included in the HR Category within the service type's definition name.

When you assign an employee in Manage Flexible Service:

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

## Selecting a Calculation Group

To include an employee in the flexible service accrual process, you must use the Employment Information page to specify a calculation group for the employee and the full-time equivalent (FTE) value to use for service accrual.

<b>To select a calculation group for an employee:</b>
---

1. Access the Employment Information page.
2. Select a service calculation group for the employee in Calc Group (Flex Service) (calculation group [flexible service]).

For example, you might select the calculation group *ADMIN* for a department administrator.

Defaults for the calculation group come from the following sources:

- a. Position Data component, if present.
  - b. Job Code component, if present.
  - c. User entry.
3. In the FTE for Service Accruals field, enter the FTE value to be used in prorating the employee's accrued service.

The FTE count is automatically populated from the job record for the initial entry of the calculation group. This FTE value is used in conjunction with the prorating method and value that you specified in the Service Rules component.

### See Also

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

*PeopleSoft Human Resources PeopleBook: Manage Positions*, “Setting Up Positions,” Creating Positions

*PeopleSoft Application Fundamentals for HRMS PeopleBook*, “Setting Up Jobs and Pay Groups,” Classifying Jobs and “E&G Setting Up Service Parameters and Service Accrual Control Tables,” Associating a Calendar, Proration, and Date Method With a Service Definition Name and Defining Service Calculation Groups

## Entering Startup Credits and Exceptions

Enter employee information on the Service Detail page if any of the following are true:

- The employee has a startup credit that you want to include in his service accrual for a service type within a calculation group.

The Startup Cr (startup credit) field is defined for each service type. Include prior service credits for the employee here; for example, credits from another organization that carry over.

- The employee has a service type that will start accruing credits on a different date than the date on the run control page.

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

- The employee isn't entitled to accrue service credits for one or more of the service types within the calculation group they belong to.

To exclude the service type from accruing credits for the employee, enter the service type and select Override.

- The employee belongs to a calculation group that has a service type with eligibility criteria different from the employee's regular, temporary full-time, or part-time status, and the employee can accrue service credits for that service type.

For example, if the service type's eligibility criteria state that only full-time employees accrue service credits and you want a specific part-time employee to be able to accrue credits, you can override the eligibility criteria for the employee here. Enter the service type for the employee to override the default on the calculation group's service type.

The start dates for processing the service types are populated from the Run Control page if you don't enter them.

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

---

## Page Used to Enter Startup Credits and Exceptions

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Service Detail	EG_FLX_SVC_DT	Administer Workforce, Administer Flexible Service, Use, Flexible Service, Service Detail	Enter employee's startup credits and record exceptions to the employee's accrual process.

---

## Entering Startup Credits

Access the Service Detail page.

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

Service Detail page

### Service Type

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

Only service types valid for the selected calculation group appear.

### Start Date

Enter the start date that you want credits to begin accruing for this service type.

Each service type can have a different start date. However, these dates must fall within the range of dates on the calendar used by the calculation group.

### Service

Displays the total accrued service credit amount.

The value displayed here is a result of an Update to History run process and reflects the actual credit amount.

### (Yrs/Months/Days) (years/months/days)

Displays the total accrued credits in terms of years, months, and days. The service credits have been converted to service years, months, and days from the accrued credit value.

The values displayed here are a result of the Update to History run process and reflect an actual length of time.

### Last Proc Dt (last process date)

Displays the date the service accrual process has accrued to. This is the To Date that you entered on the run control page.

### Startup Cr

Enter the credit amounts the employee has previously accrued from another job or organization. This value is included in the service accrual process and added to the employee's total credits.

The startup credit is based on a yearly unit, so enter six months' credit as *0.50*.

<b>Override</b>	Select to <i>exclude</i> the service type from the service accrual process for this employee. Clear to include the service type in the service accrual process for the employee.
<b>Notes</b>	Enter supplementary notes that pertain to the service type entered for the employee (for example, where the employee earned prior startup credits).
<b>Change Reason</b>	<p>If you enter a service type, change the start date for the service type, or enter a startup credit on this page, then record the reason for any changes made.</p> <p>Select a value from the available options. Valid values include <i>Retroactive Adjustment</i>, <i>Other</i>, and <i>Error Correction</i>. You can add values on the Translate Table.</p>

## Reviewing Related Jobs for Flexible Service

The Related Job for Flex Service page provides an overview of:

- Whether an employee is included in flexible service tracking.
- Which calculation groups an employee belongs to for each job and position held.
- Which calculation groups an employee accrues flexible service credits for.

---

### Page Used to Review Credit Accrual

<b>Page Name</b>	<b>Object Name</b>	<b>Navigation</b>	<b>Usage</b>
Related Job for Flex Service (related job for flexible service)	EG_FLX_JOBS	Administer Workforce, Administer Flexible Service, Inquire, Related Jobs for Flex Service, Related Job for Flex Service	Displays all jobs and positions the employee holds that are eligible to accrue service credits.

---

### Reviewing Flexible Service Credits

Access the Related Job for Flex Service page.

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

Related Job for Flex Service page

**Orig Hire** (original hire) Displays the employee’s hire date.

**Per Status** (personnel status) Displays the employee's personnel status.

**Jobs Counted for Flexible Service**

**Empl Rcd#** (employee record number) Displays the employee's employment record number.

**Service Calc Group** (service calculation group) Displays the service calculation group the employee belongs to within the job or position.

**FTE for Accrual** Displays the employee's FTE value.

An employee working 80 percent of a normal full-time schedule has an FTE of .80. The FTE for Accrual value is maintained on the Employment Information page.

## CHAPTER 4

# Calculating Flexible Service and Viewing Results

This chapter provides an overview of calculating flexible service and discusses how to:

- Run the flexible service calculation process.
- View flexible service calculation results.

## Understanding Calculating Flexible Service

Once you set up service parameters and the flexible service control tables and you assign employees to calculation groups, you are ready to run the flexible service calculation process from the Service Calc Process (service calculation process) page. Run this batch process on a periodic basis, for example, at the end of a service year or a service computational (calendar) period to calculate the accrued service record for each employee.

Calculating flexible service is a two-step process:

1. Calculate service credits in Normal Run processing mode for a specific time period, such as a semester or fiscal year.

You can calculate service credits for:

- A specified calculation group or an individual employee.
- All service types within the calculation group or just one service type.

View the results using the Flex Calc. Summ. (flexible calculation summary) page.

Normal Run mode produces the results in a temporary file, which enables you to rerun the process until you are satisfied with the results.

---

**Note.** After you run the process in Normal Run mode, we recommend that you view any messages about the batch processing using the Message Log and Periodic Results pages. Viewing messages enables you to make sure the employee's service credits are properly processed before you commit them to history in Update to History mode.

---

2. Run the service calculation process in Update to History mode.

Update to History mode uses the temporary file created in Normal Run mode and applies it to the employee's service history. View the results on the Svc History page (service

history page). Once this data is committed to history, the temporary file created in Normal Run mode is deleted.

### **See Also**

*PeopleSoft Human Resources PeopleBook: Track Faculty Events, “Tracking Tenure,” Viewing the Message Log and Viewing Periodic Process Results*

---

## **Understanding Processing Modes**

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

### **Normal Run**

Normal Run mode calculates accrued service credits for a specific time period and stores the results in a temporary file. Specify the time period that you want to process service credits for on the Service Calc Process page when you enter the From and To dates. Use Normal Run mode on a periodic basis. For example, in a 10-month calendar year with two calendar periods of 5 months each, you might want to run the process after each 5-month calendar period.

Normal Run mode doesn't affect an employee's existing service history data. View the temporary data using the Flex Calc. Summ. page, or print the Service Calc Report (service calculation report) for a listing of the service calculations. You typically create the temporary file from Normal Run mode for a specified period of time, then commit this data to history by running the process in Update to History mode for the same period.

---

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

---

### **Update to History**

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

Because Update to History mode commits to history the data generated in Normal Run mode, you must use the same run control ID used in Normal Run mode so the processing dates and calculation group will be identical for both batch processes. By using the same run control ID, you ensure that the processing dates are the same.

**Delete\_Rebuild History**

Delete\_Rebuild History mode deletes previously saved service history data and enables you to delete service credits that have been committed to history for the time period (the From and To dates) specified on the run control page.

This processing mode recreates the service credits, in a temporary file, for the time period and calculation group specified. The existing history data for the same time period is then flagged. The batch process uses this flag in a later process to identify which history data to delete.

However, the history data isn't deleted until you decide to delete it. You can compare the newly created temporary file against the existing flagged history data. If the new temporary data is correct, run the process in Update to History mode for the same time period and calculation group. This deletes the flagged history data and recreates the history data from the temporary file created in Delete\_Rebuild History mode. You won't use this processing mode often.

If the history data becomes corrupt, Delete\_Rebuild History mode enables you to rebuild an employee's service history. For example, if any manual adjustments to the service history data on the Svc History page were made incorrectly and not noticed until after running several processes in Update to History mode, you can rebuild the history data.

**Note.** Delete\_Rebuild History mode does not re-accrue manual adjustments entered on the Svc History page. You must re-enter these adjustments after the data is committed to history again. However, the system will recalculate all startup credits.

---

If you want to set up your run control page but you don't want to execute the process until later, save the run control page using the *[none]* option.

---

**Running the Flexible Service Calculation Process**

With the Service Calc Process page you can process one or all service types within the calculation group, and you can process one employee rather than all employees within the calculation group.

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

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

In this section, we discuss:

- How to specify time periods and calculation groups.
- How the calculation process works.

### Page Used to Run the Flexible Service Calculation Process

Page Name	Object Name	Navigation	Usage
Service Calc Process	RUNCTL_EGPP02	Administer Workforce, Administer Flexible Service, Process, Service Calc Process, Service Calc Process	Process service credits for a specified time period and calculation group.

### Specifying Time Periods and Calculation Groups

Access the Service Calc Process page.

Service Calc Process

Run Control ID: 142 [Report Manager](#) [Process Monitor](#) Run

From Date:

To Date:   Calculation Name: 142

\*Calc Group:   Continuous Service

Calc all Service Types Service Type:

EmplID:   Flynt,Mildred

**Service Date Processing Type**

**Periodic Processing Mode - E&G**

Delete old Calc Results

Delete & Reload History

Commit to History

Service Calc Process page

**Run**

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

**From Date and To Date** Enter the time period for the calculation. These dates *must* match a computational period of the calendar used by the **Calc Group** (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.

**Calculation Name** This field is automatically populated from the run control ID that you entered. It is used internally by the batch process.

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

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

This field is unavailable if you have selected the Calc All Service Types check box.

### **Service Date Processing Type**

**Period Processing Mode - E&G** Select the mode that you want to use from the following options:

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

**Warning!** This mode removes *all* service history based on the calculation group or the employee that you specified.

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

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

### **See Also**

*PeopleSoft Process Scheduler PeopleBook*

---

## Understanding How the Calculation Process Works

The system processes each flexible service type in the calculation group that you select as follows.

### ***Determining an Employee's Eligibility for a Flexible Service Type***

To determine the eligibility criteria for processing, the batch process first establishes if the employee has a service detail record. The system processes all service detail records for all service types, except those records that have the override calculation option selected Service Detail page. If the employee has no service detail record, the system searches job history records within the specified time period and checks the eligibility criteria defined for the service type on the Calculation Group page to determine the employee's eligibility. (When you assign a service type to a calculation group, you define the eligibility criteria as full time or part time and as permanent or temporary.) If the employee is eligible, the process continues for that employee.

---

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

---

### ***Running a Service Calculation***

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

1. The system searches the employee's job history for a calendar period to determine the service credit and uses the elapsed time method by measuring the time between two dates.

In the case of job history, the system measures the time between the effective dates of two job records and applies the service and eligibility rules included under the employee's flexible service type.

2. Once the accrual process runs for a flexible service type for an employee, the system performs Proration by FTE process on the calculated service if prompted to do so by the proration limits established on the Service Definition page.
3. The system writes the service history to a temporary flexible service history file based on the calendar periods that you set up on the Calendar page.

This temporary file is different from the final service history file.

### ***Updating Flexible Service Detail and History***

The batch program processes employees by selecting their service history for each flexible service type from the temporary service history file. If an employee already has a service detail record, the process adds the total calculated service amount to the Service field and

updates the Last Proc Date (last processed date) field to indicate the To Date of the accrual process.

---

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

---

If an employee doesn't have a service detail record, the system creates a record and the service history details.

Once the process has updated the employee records, the employee's service details are purged from the temporary service history file. They are no longer needed.

## Viewing Flexible Service Calculation Results

In this section, we discuss how to view:

- The message log.
- Periodic process results.
- Normal Run results.
- Service history information.
- Service detail information.

---

### Pages Used to View Flexible Service Calculation Results

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Flex Calc. Summ.	EG_CLC_FLX_SUM	Administer Workforce, Administer Flexible Service, Inquire, Flex Service Calc. Summary, Flex Service Calc Summ.	Review the results from a Normal Run of the flexible service accrual process.
Svc History	EG_SVC_HIST_FLX	Administer Workforce, Administer Flexible Service, Use, Service History, Flex Service History	Review the history of service credits for each calendar period, either calculated from the batch process or manually entered.

## Reviewing the Message Log and Periodic Results

After you run the Service Calculation process you can view the messages produced by this process on the Message Log page and the results of the process on the Periodic results page.

### See Also

*PeopleSoft Human Resources PeopleBook: Track Faculty Events, “Tracking Tenure,”*  
Viewing the Message Log and Viewing Periodic Process Results

## Reviewing Normal Run Results

Access the Flex Calc. Summ. page.

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

Flex Calc. Summ. page

This page displays the results from running the flexible service accrual process in Normal Run mode. After the process is run in Update to History mode, the system deletes the data from the temporary file created in Normal Run mode and you can no longer view it on this page.

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

<b>Calculation Name</b>	The name of the run control ID.
<b>Periodic Cycle</b>	The periodic cycle selected on the Service Calc Process page.
<b>From Date and To Date</b>	The From and To dates entered on the run control page. These dates indicate the begin and end dates for this process.

<b>Begin/End Date</b>	The begin and end dates that service credits were accrued for.  One line appears for each of the calendar period dates that fall within the From and To dates that you specified on the run control page.
<b>Service Amt without Breaks</b> (service amount without breaks)	Displays the amount of accrued service without breaks that counts toward flexible service.
<b>Service Amt with Breaks</b> (service amount with breaks)	Displays the amount of accrued flexible service with breaks that counts toward flexible service.
<b>Service Adjustment</b>	Displays the adjustment amount entered on the Svc History page.
<b>Accrued Service</b>	Displays the total amount of accrued service.
<b>Accum Breaks</b> (accumulated breaks)	Displays the total amount of breaks in service.
<b>Action</b>	Displays the job action code that contributed to the service accrual for the calendar period.
<b>Total (#yrs/mths/days)</b> (total number of years, months, and days)	Displays the total years, months, and days of accrued service earned.
<b>Breaks</b>	Displays the amount of breaks in service.

---

## Viewing Service History Information

Access the Svc History page.

**EmpIID:** PA013      Flynt,Mildred

**Calc Group:** SRVC      Continuous Service

**Service Type:** CONTSRV      Continuous Service

[View All](#)    First ◀ 1-3 of 11 ▶ Last

Begin Date End Date	Service w/o Breaks	Service Adjusted	Total Service Accrued	Accum Breaks	+ -
01/01/2000 06/30/2000	0.500000	0.000000	5.330000	0.000000	+ -
Action: HIR Reason Code: Adj Rsn: <input type="text"/> Notes					
07/01/1999 12/31/1999	0.500000	0.000000	4.830000	0.000000	+ -
Action: HIR Reason Code: Adj Rsn: <input type="text"/> Notes					
01/01/1999 06/30/1999	0.500000	0.000000	4.330000	0.000000	+ -
Action: HIR Reason Code: Adj Rsn: <input type="text"/> Notes					

**Svc History page**

You can make manual adjustments to history data on this page. However, you can't make adjustments in between creating the temporary file in Normal Run mode and updating the data to history in Update to History mode. During this time, the fields on this page are unavailable. Once the service data is committed to history—that is, after you run the process in Update to History mode—you can manually adjust the amount fields. The dates remain unavailable.

Ordinarily, you wouldn't change previously earned service credits except to correct an entry mistake. For example, if you forgot to give an employee a startup credit for a service type, you enter the adjustment here.

---

**Note.** Manual adjustments entered on the Svc History page are included in the next Update to History process mode run.

---

- Begin Date and End Date**      The service history begin and end dates calculated for this calendar period.
- Service w/o Breaks** (service without breaks)      The amount of service accrued without service breaks.
- Service Adjusted**      The amount of service adjusted.
- Total Service Accrued**      The total amount of service accrued for the employee.
- Accum Breaks**      The total amount of breaks in service.

<b>Action</b>	Displays the job action from the employee's job record, such as <b>LOA</b> (leave of absence), that falls within the calendar period.
<b>Reason Code</b>	Displays the Reason Code associated with this job action that counts toward accrued service.  Use the HR Action/Category page to define job actions and reasons that count toward service accrual.
<b>Adj Rsn</b> (adjustment reason)	The reason for manual adjustments made on this page.  This field is informational only.

---

### Viewing Service Detail Information

Use the Service Detail to view total accrued service credits after running the flexible service calculation process in Update to History mode. Use this page to establish start-up credits for an employee and record employee exceptions to service accrual.

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



# Index

## C

calculation group  
    assigning an employee 3-1  
    selecting 3-1  
CD-ROM  
    ordering ii

## F

Flex Calc. Summ. page 4-8  
Flexible Service  
    calculation process 4-3  
    explanation 2-1  
    processing 4-1  
    processing modes 4-2  
    reviewing related jobs 3-5  
    viewing results 4-1  
flexible service tracking defaults  
    setting 2-2

## J

Job Code Table  
    setting up for Flexible Service Tracking 2-3

## M

message log  
    viewing 4-7

## P

PeopleBooks  
    CD-ROM, ordering ii  
    printed, ordering ii  
Position Data  
    setting up for flexible service tracking 2-3

## R

related Job for Flex Service page 3-5

## S

service accrual control tables  
    setting up 2-2  
Service Calc Process page 4-4  
service calculation process  
    explanation 4-6  
service detail information  
    viewing 4-11  
Service Detail Page 3-3  
    entering startup credits, exceptions 3-3  
service parameters  
    setting up 2-1  
startup credits and exception  
    entering 3-2  
Svc History page 4-9

