

PeopleSoft®

PeopleSoft 8.8
Human Resources PeopleBook:
Track Faculty Events

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Human Resources PeopleBook:
Track Faculty Events
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About This PeopleBook

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical elements and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

See *Using PeopleSoft Applications*.

You might also want to complete at least one PeopleSoft introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by 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.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

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

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection Website. Through the Documentation section of PeopleSoft 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 that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection Website, <http://www.peoplesoft.com/corp/en/login.asp>

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection Website, access the PeopleSoft Press Website under the Ordering PeopleBooks topic. The PeopleSoft Press Website is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact CPI at 800 888 3559.

Email

Send email to CPI at psoftpress@cc.larwood.com.

See Also

PeopleSoft Customer Connection Website, <http://www.peoplesoft.com/corp/en/login.asp>

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.

Typographical Conventions

The following table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number <i>O</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.
Monospace font	Indicates a PeopleCode program or other code example.
(quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
... (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
(ISO)	Information that applies to a specific country, to the U.S. federal government, or to the education and government market, is preceded by a three-letter code in parentheses. The code for the U.S. federal government is USF; the code for education and government is E&G, and the country codes from the International Standards Organization are used for specific countries. Here is an example: (GER) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV Directive.
Cross-references	PeopleBooks provide cross-references either below the heading See Also or on a separate line preceded by the word <i>See</i> . Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note. Example of a note.

A note that is preceded by *Important!* is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Comments and Suggestions

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

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

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements in These PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID 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.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, 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.
Once, Always, and Don't Run	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.

Report Manager	Click to access 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).
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
Request ID	An ID that represents a set of selection criteria for a report or process.
User ID	An ID that represents the person who generates a transaction.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.

See Also

Using PeopleSoft Applications

PeopleSoft Process Scheduler

PeopleSoft Human Resources Track Faculty Events Preface

This preface discusses:

- PeopleSoft application fundamentals.
- PeopleBook structure.

Note. This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then it either requires no additional explanation or is documented with the common elements for the section, chapter, PeopleBook, or product line.

PeopleSoft Application Fundamentals

The *PeopleSoft Human Resources PeopleBook: Track Faculty Events* provides you with implementation and processing information for your PeopleSoft Human Resources system. Additionally, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Application Fundamentals for HRMS PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

PeopleSoft Application Fundamentals for HRMS PeopleBook consists of important topics that apply to many or all PeopleSoft applications across the PeopleSoft HRMS product line. No matter which PeopleSoft products you are implementing, 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.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook

PeopleBook Structure

PeopleSoft PeopleBooks follow a common structure. By understanding this structure, you can use this PeopleBook more efficiently.

Chapters	Description
Preface	This is the chapter you're reading now. It explains: • How to use the Application Fundamentals book. • How PeopleBooks are structured.

Chapters	Description
Getting Started With...	This chapter discusses product implementation guidelines. It explains: • The business processes documented within the book. • Integrations between the product and other products. • A high-level guide to how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.
Understanding...	This is an introductory chapter that broadly explains the product and the functionality within the product.
Setup and Implementation	This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the product. For example, if functionality X is part of a product, this chapter would be devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You would look to the corresponding business process chapter to learn how to use the functionality. Note. There may be times when a small amount of business process information is included in a setup chapter if the amount of business process documentation was insufficient to create a separate section in the book.
Business Process	This can be one or more chapters. These chapters contain documentation that addresses specific business processes with each chapter generally devoted to a specific functional area. For example, if functionality X is part of a product, this chapter would be devoted to explain how the functionality works, not necessarily how to set up functionality X. You would look to the corresponding setup and implementation chapter to learn how to set up the functionality. Note. There may be times when a small amount of setup and implementation information is included in a business process chapter if the amount of setup and implementation documentation was insufficient to create a separate chapter in the book.

Chapters	Description
Appendixes	(optional) If the book requires it, one or more appendixes might be included in the book. Appendixes contain information considered supplemental to the primary documentation.
Reports Appendix	(optional) This appendix contains an abbreviated list of all of the product's reports. The detailed documentation on the use of these reports is usually included in the related business process chapter.

CHAPTER 1

Getting Started With PeopleSoft Human Resources Track Faculty Events

This chapter provides an overview of PeopleSoft Human Resources Track Faculty Events business processes and discusses:

- PeopleSoft Human Resources Track Faculty Events business processes.
- PeopleSoft Human Resources Track Faculty Events integrations.
- PeopleSoft Human Resources Track Faculty Events implementation.

PeopleSoft Human Resources Track Faculty Events Business Processes

PeopleSoft Human Resources Track Faculty Events business processes are:

- Track faculty tenure.
- Track events.
- Manage cases.
- Work with the Statistics Canada Academic Teaching Surveys.
- Reporting DETYA (Department of Education, Training and Youth Affairs) for the Australian Higher Education Sector.

PeopleSoft Human Resources Track Faculty Events Integrations

PeopleSoft Human Resources integrates with all the PeopleSoft HRMS applications, with other PeopleSoft applications, and with third-party applications.

PeopleSoft Human Resources shared tables are available to many PeopleSoft HRMS applications. In addition, data in many HR tables is available to any PeopleSoft application that is set up to subscribe to the published messages.

We cover integration considerations in this PeopleBook.

See Also

PeopleSoft Human Resources Track Faculty Events Implementation

The Track Faculty Events table-loading implementation includes setting up the following:

- PeopleSoft HRMS fundamental tables.
- Track Faculty Events application tables.
- Additional Track Faculty Events application tables.

In the planning phases of your implementation, take advantage of all PeopleSoft sources of information, including installation guides and table-loading sequences.

Note. The order in which you set up tables required to implement PeopleSoft Human Resources Track Faculty Events may vary; each individual application is not necessarily set up in sequence. For example, you may set up HRMS tables, then tables for the Track Faculty Events core application, then several tables specific to the country or industry you operate in, followed by additional Track Faculty Events core tables. In addition, the order in which you set up tables may also depend on the features you want to use. The information provided in this chapter offers a high-level guide of how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.

Setting Up PeopleSoft HRMS Fundamental Tables

The Track Faculty Events business process requires the setup of fundamental HRMS tables, common to multiple HRMS applications. The information that you define on these tables lays the foundation for the Track Faculty Events business process setup.

Step	Reference
1. Set up PeopleSoft HRMS fundamental tables.	<i>PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook</i> , "Getting Started With PeopleSoft HRMS"
2. Set up PeopleSoft Human Resources fundamental tables.	<i>PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook</i> , "Getting Started With PeopleSoft HRMS"

Setting Up Core PeopleSoft Human Resources Track Faculty Events Tables

The steps discussed in this section suggest an order in which you define the information in your core Track Faculty Events tables. The information that you defined in your fundamental tables lays the foundation for this setup.

The steps laid out here assume that you have hired people into your PeopleSoft Human Resources system.

Setting up core Track Faculty Events tables prepares your system to support these business processes:

- Track faculty tenure.

- Track events.
- Manage cases.
- (CAN) Work with the Statistics Canada Academic Teaching Surveys.
- (AUS) Report DETYA for the Australian Higher Education Sector.

Step	Reference
1. Set up service parameters.	Chapter 3, “Setting Up Track Faculty Tenure,” Setting Up Service Parameters, page 13
2. Set up service accrual control tables.	Chapter 3, “Setting Up Track Faculty Tenure,” Setting Up Service Accrual Control Tables, page 22
3. Set up service parameters and service accrual control tables.	Chapter 3, “Setting Up Track Faculty Tenure,” Setting Up Service Parameters and Service Accrual Control Tables, page 9
4. Set up academic ranks.	Chapter 3, “Setting Up Track Faculty Tenure,” Establishing Academic Ranks, page 41
5. Set up experience and credit codes.	Chapter 3, “Setting Up Track Faculty Tenure,” Setting Up Experience and Credit Codes, page 42
6. Set up administrative posts.	Chapter 4, “Tracking Events,” Setting Up Administrative Posts, page 64

Setting Up Additional PeopleSoft Human Resources Track Faculty Events Tables

These steps define information in additional Track Faculty Events tables. The information that you define in your core tables lays the foundation for this Track Faculty Events-specific set up.

Setting up these additional tables prepares your system to support these business processes and tasks:

- Complete and submit the Statistics Canada Academic Teaching Survey.
- Complete and produce Department of Education, Training and Youth Affairs (DETYA) reports.

Step	Reference
1. (CAN) Set up HRMS control tables with Statistics Canada information.	Chapter 6, “(CAN) Working with the Statistics Canada Academic Teaching Surveys Process,” Setting Up PeopleSoft HRMS Control Tables, page 83
2. (CAN) Set up faculty events control tables with Statistics Canada information.	Chapter 6, “(CAN) Working with the Statistics Canada Academic Teaching Surveys Process,” Setting Up Track Faculty Events Tables, page 84
3. (CAN) Define principal subjects taught codes.	Chapter 6, “(CAN) Working with the Statistics Canada Academic Teaching Surveys Process,” Maintaining Principal Subjects Taught Codes, page 85
4. (CAN) Set up faculty codes.	Chapter 6, “(CAN) Working with the Statistics Canada Academic Teaching Surveys Process,” Defining Faculty Codes, page 86

Step	Reference
5. (CAN) Identify non-operational funding sources.	<u>Chapter 6, “(CAN) Working with the Statistics Canada Academic Teaching Surveys Process,” Identifying Non-Operational Funding Sources, page 86</u>
6. (CAN) Create report period dates.	<u>Chapter 6, “(CAN) Working with the Statistics Canada Academic Teaching Surveys Process,” Maintaining Report Period Dates and Parameters, page 87</u>
7. (AUS) Define classification codes.	<u>Chapter 7, “(AUS) Reporting DETYA for the Australian Higher Education Sector,” Maintaining Classification Codes, page 105</u>
8. (AUS) Define organization units.	<u>Chapter 7, “(AUS) Reporting DETYA for the Australian Higher Education Sector,” Pages Used to Set Up DETYA Reporting Codes, page 105</u>

CHAPTER 2

Understanding PeopleSoft Human Resources Track Faculty Events

This chapter provides an overview of the Track Faculty Events business processes and discusses how to:

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

PeopleSoft Human Resources Track Faculty Events

PeopleSoft Human Resources Track Faculty Events business process enables you to track tenure, faculty events, and to manage faculty cases and reporting requirements.

Tracking Tenure

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

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

Tracking Events

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

- Activities.
- Administrative posts.
- Education, both school and professional training.
- Honors and awards.

- Licenses and certificates.
- Memberships in professional organizations.
- Presentations.
- Publications.
- Special projects.
- Student advisement.
- Teaching responsibilities.
- Committee membership.

Managing Cases

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

(CAN) Submitting Statistics Canada Academic Teaching Surveys

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

The Load Teaching Survey Data – FT Survey process creates a FT Academic Teaching Survey record for each employee who meet certain the conditions for full time. The Load Teaching Survey Data – PT Survey process creates a PT Academic Teaching Survey record for each employee who meet the conditions for part time. To produce these reports, some additional HRMS control tables with Statistics Canada fields listed after each table must be set up. This section discusses the details associated with setting up these tables as well as producing the reports.

(AUS) Reporting DETYA for the Australian Higher Education Sector

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

CHAPTER 3

Setting Up Track Faculty Tenure

This chapter provides an overview of tracking tenure and discusses how to:

- Set up service parameters and service accrual control tables.
- Set up service parameters.
- Set up service accrual control tables.
- Set up tenure tracking.
- 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.
-------------------------	---

Setting Up Service Parameters and Service Accrual Control Tables

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

Before setting up service rules, you set up methods to handle the time duration between the dates that are used for measuring accrued service. Once you define your duration, date rounding, and date conversion options, you set up the service accrual control tables so that you can use the Tenure Tracking and Flexible Service Tracking features. These features use the elapsed-time method to measure the time periods (duration) between job actions. This method calculates the duration between two raw dates by subtracting one date from another.

This section discusses service rules, service parameters, and accrual tables for both Track Flexible Service and Track Tenure.

Understanding Service Rules

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

Service parameters are generic across tenure and flexible service calculations. Once you set up a method, you can use it as often as necessary in tenure service and flexible service definitions. For example, you use these options in defining a flexible service definition for a seniority rule. A seniority service rule might state the following:

- A hire date is effective the first day of the month of hire.
- A leave of absence doesn't count toward service. A leave is considered effective the first day of the month if its start date is before the fifteenth.
- A return from leave reinstates service accrual and is considered effective the first day of the month of return.

The service year you are using has two semesters: August 1, 1997 to December 31, 1997 and January 1, 1998 to May 31, 1998. Your rules specify that each semester counts as 0.50 years of service. You set up human resources action categories for Hire, Leave of Absence, and Return from Leave.

You can set up two date-rounding options. One option rounds the effective date of the history to the first of the month; the other rounds the effective date to the first of the month when the date falls before the fifteenth of the month. You apply the two rounding options to the HR action categories, using the Service Rules component. Let's say that an employee is hired on August 3, 1997. The employee begins a leave of absence on October 13, 1997 and returns to work on December 1, 1997. The employee's job history looks like this:

Action	Effective Date	Adjusted Effective Date for Service
Hire	08/03/1997	08/01/1997
Leave	10/13/1997	10/01/1997
Return	12/01/1997	12/01/1997

See *PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce*, "Viewing Summary Workforce Information," Viewing an Employee's Job History.

For the semester August 8, 1997 to December 31, 1997 (08/01/1997 to 12/31/1997), the employee accrues service as follows:

- 0.20 years for the period 08/01/1997 to 09/31/1997.
- 0.10 years for the period 12/01/1997 to 12/31/1997.

For the same semester, 0.20 years aren't counted toward accrual for the period 10/09/1997 to 11/30/1997.

To establish service parameters, you need to:

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

Understanding Date Math Methods

A date that is expressed in terms of years, months, and days (YYYY/MM/DD) is a *raw date*. Raw date subtraction subtracts days from days, months from months, and years from years, for example:

$$1998/01/01 - 1996/08/01 = 0001/05/00$$

or 1 year, 5 months, and 0 days.

- However, consider the subtraction

$$1998/11/01 - 1995/12/15$$

You can't subtract 15 (days) from 1, so you have to convert one of the months to days. However, when you change the 11 months to 10, how many days do you carry to the "day" column?

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

In our example, the tenth month (October) is the most recent full month that you can convert to days. October has 31 days, so 1998/11/01 becomes 1998/10/32. You still have to convert 1 year to months to complete the subtraction, but you know that there are always 12 months in a year.

- Therefore, you end up with a date of 1997/22/32 and the equation is:

$$1997/22/32 - 1995/12/15 = 0002/10/17$$

or 2 years, 10 months, and 17 days.

- If you assume 30 days per month, 1998/11/01 becomes 1998/10/31. After you again convert 1 year to 12 months, you end up with 1997/22/31. The equation is:

$$1997/22/31 - 1995/12/15 = 0002/10/16$$

or 2 years, 10 months, and 16 days.

Setting Decimal to Raw Date Conversion Options

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

The conversion methods use $\left(\text{Months} - 1\right)$ and $\left(\text{Days} - 1\right)$ instead of just Months and Days. This represents the number of whole months and days. For example, in the sample date 06/6/92, you're only six days into the sixth month (June). Therefore, the last whole month is the fifth month (May). The component discounts the present day, ensuring that 01/01/90 becomes 1990.0000, and vice versa.

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

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

Setting Up Date Round Options

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

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

To create a rounding rule, you set up all three parts of the rule: the rounding day, the rounding rule, and the rounding period, as shown in the following table:

Rounding Day	Rounding Rule	Rounding Period
First day of	Next	Month
Last day of	Previous	Month

Establishing Duration Options

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

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

- *Setting Raw Date Subtraction Parameters*

As in our earlier discussion of raw date subtraction, you convert months to days to perform subtractions where the smaller (earlier) date has fewer days than the larger (later) date, for example:

1998/11/01 – 1995/12/15

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

- If you use Assumed Days Per Month, enter a fixed number of days in the adjacent field. This number is used regardless of the month in question.
- If you use Actual Days Per Month, the number of days depends on the month in question. In this case, the tenth month (October) is the most recent full month that you can convert to days. October has 31 days, so 1998/11/01 becomes 1998/10/32.

- *Choosing Rounding Methods*

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

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

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

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

- *Rounding Decimal Dates and Durations*

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

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

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

Setting Up Service Parameters

This section discusses how to:

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

Pages Used to Set Up Service Parameters

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

Selecting a Calculation Method

Access the Calculation Option page.

Calculation Option **Conversion Options**

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

Raw Date Subtraction

☒ Raw Date Subtraction ☐ Actual Days Per Month ☒ Assumed Days Per Month 30

Month Round Rule

☒ Round Up if Periods > 12 (in Months)
☐ Round Up if Periods > 0
 Else Round Down:
☐ None

Day Round Rule

☐ Round Up if Periods > 0 (in Days)
☒ Round Up if Periods > 15
 Else Round Down:
☐ None

For Service Calculation, use "Raw Date Subtraction"

Calculation Option page

Raw Date Subtraction

This option is selected by default.

Actual Days Per Month

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

Assumed Days Per Month

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

Note. We recommend that you use Assumed Days Per Month to avoid possible rounding issues.

Month Round Rules

Round Up if Periods > . . . (in Months)

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

Round Up if Periods > . . . Else Round Down

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

None

Select to avoid rounding.

Day Round Rules

Round Up if Periods > . . . (in Days)

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

Round Up if Periods > . . . Else Round Down

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

None

Select to avoid rounding.

See Also

Chapter 3, “Setting Up Track Faculty Tenure,” Understanding Service Rules, page 10

Chapter 3, “Setting Up Track Faculty Tenure,” Selecting a Conversion Method, page 16

Selecting a Conversion Method

Access the Conversion Options page.

Calculation Option **Conversion Options**

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

Decimal Conversion Assumptions

*Days Per Month: Number of Decimal Places:

*Days Per Year:

Decimal Conversion Method

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

Month Conversion Rules **Year Conversion Rules**

☐ Up ☐ Down ☐ Near ☒ None ☐ Up ☐ Down ☐ Near ☒ None

Conversion Options page

Decimal Conversion Assumptions

Days Per Month

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

Days Per Year

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

Number of Decimal Places

At all points in the conversion process, decimals are rounded to the number of places that you specify in this field.

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

Decimal Conversion Method

The system supports one decimal conversion formula:

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

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

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

Month Conversion Rules

Select Up, Down, Near, or None as the rule for converting months.

See [Chapter 3, “Setting Up Track Faculty Tenure,” Setting Up Date Rounding Rules, page 17.](#)

Year Conversion Rules

Select Up, Down, Near, or None as the rule for converting years.

See [Chapter 3, “Setting Up Track Faculty Tenure,” Setting Up Date Rounding Rules, page 17.](#)

Setting Up Date Rounding Rules

Access the Date Round Option page.

Date Round Option	
Date Rounding Definition Name:	ACAD10
*Description:	1st day of comp. period
Date Type	
☒ Raw Date	User Code
Rounding Day	
☒ First Day of Period (Rounding Period)	☐ Last Day of Period
Rounding Period	
☐ Calendar Month	☐ Calendar Year
(as defined in the calendar)	
Rounding Rule	
☒ Coincident or Next	☐ Next
☐ Coincident or Previous	☐ Previous
☐ Up if Day/Month =>	☐ Up if Day/Month =>
Threshold No.:	Else Down
☐ Near	(Note: Rule based on selected Rounding Period)

Date Round Option page

Date Type

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

Rounding Day

Select whether to round to the First Day of Period or Last Day of Period.

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

However, if you round to the first day of a period, you can round to the Next, the Coincident (with) or Next, the Previous, the Coincident (with) or Previous, or the Near (nearest) rounding day.

Rounding Period

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

Rounding Rule

Make your rounding dependent on a threshold number of days in the month or a threshold number of months in the year by selecting Up if Day/Month => (up if day or month is equal to or greater than) or Up if Day/Month => . . . Else Down. Both options round up after a threshold number of days (if the rounding period is months) or months (if the rounding period is year). However, the first option doesn't round dates that are below the threshold, whereas the second option rounds down.

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

Rounding Rule	Base Date	Rounded Date
Coincident (with) or Next Following	05/01/1995	05/01/1995
Coincident (with) or Next Following	05/02/1995	06/01/1995
Next Following	05/01/1995	06/01/1995
Coincident (with) or First Previous	05/01/1995	05/01/1995
First Previous	05/01/1995	04/01/1995
First Previous	05/02/1995	05/02/1995
Near	05/03/1995	05/01/1995

Threshold Rounding Rule	Base Date	Threshold	Rounded Date
Round Up if . . .	05/17/1995	15	06/01/1995
Round Up if . . . Else Down	05/17/1995	15	06/01/1995
Round Up if . . .	05/17/1995	20	05/17/1995
Round Up if . . . Else Round Down	05/17/1995	20	05/01/1995

Select a rounding rule from the following options:

Coincident or Next

Next

Coincident or Previous

Previous

Up if Day/Month =>

Up if Day/Month => . . . Else Down

Near

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

See Also

[Chapter 3, “Setting Up Track Faculty Tenure,” Defining the Human Resources Service Categories, page 31](#)

Setting Up a Date Conversion Method

Access the Date Conversion page.

Date Conversion

Definition Name: ACAD
Description: Academic 10 month

Option Type
☒ Decimal Conversion

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

Conversion Method
☒ $\text{Yrs} + ((\text{Months} - 1 * (\text{Days} / \text{Mth})) + \text{Days} - 1) / (\text{Days} / \text{Yr})$
☐ $\text{Yrs} + (\text{Months} - 1) / 12 + (\text{Days} - 1) / (\text{Days} / \text{Yr})$

Date Conversion page

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

Option Type

Decimal Conversion is the default.

Assumptions

Days Per Month	Enter the number of days per month that you want the system to assume when performing conversions.
Days Per Year	Enter the number of days per year that you want the system to assume when performing conversions.
Decimal Places	Enter the number of decimal places you want the system to use in the final decimal figure.

Conversion Method

Select one of the two formula methods:

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

See Also

Chapter 3, "Setting Up Track Faculty Tenure," Understanding Service Rules, page 10

Setting Up a Database Alias

Access the Database Alias page.

Database Alias

Database Alias Name: ***Description:**

☒ **PeopleSoft Table**

Record (Table) Name:

Field Name:

Table Key: ED Employee ID & Effective Date

Database Alias page

Database Alias Name	Enter a field value to create a database alias for referencing the Effective Date field on the Job Table.
Description	Enter a description.
PeopleSoft Table	Select this check box.
Field Name	Enter the field name.
Table Key	Enter the code for the table key.

Turning on the Application Trace

Access the Application Trace page.

Application Trace

☒ **Produce Application Trace**

☒ **Trace Tenure Service Calc**

☒ **Trace Flexible Service Calc**

Application Trace page

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

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

Trace Flexible Service Calc (trace flexible service calculations) Select to trace flexible service calculations.

Setting Up Service Accrual Control Tables

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

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

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

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

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

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

To set up service accrual control tables, you need to:

1. Establish service calendars.
2. Define Human Resources actions and categories.
3. Associate a calendar, proration, and date method with a service definition name.
4. Define the Human Resources service categories.
5. Define time adjustments.
6. Define Human Resources status history adjustments.

7. Set up final adjustments to the service amount.
8. Define adjustments that limit the number of hours or service units that can be accrued.
9. Define service calculation groups.

Pages Used to Set Up Service Accrual Control Tables

Page Name	Object Name	Navigation	Usage
Calendar	EG_FLXSVC_CALNDR	- Set Up HRMS, Product Related, Workforce Development, Faculty Events, Calendar - Workforce Development, Faculty Events, Define Faculty Events Data, Calendar	Establish service calendars for accruing service years.
HR Action/Category – HR Action/Reason	EG_HR_CATEGORY	- Set Up HRMS, Product Related, Workforce Development, Faculty Events, HR Action/Category, HR Action/Reason - Workforce Development, Faculty Events, Define Faculty Events Data, HR Action/Category, HR Action/Reason	Group similar actions and reasons that count toward service and tenure accrual.
Service Definition	EG_SVC_DEFINITION	- Set Up HRMS, Product Related, Workforce Development, Faculty Events, Service Rules, Service Definition - Workforce Administration, Flexible Service EG, Define Service Rules, Service Definition - Workforce Development, Faculty Events, Define Faculty Events Data, Service Rules, Service Definition	Associate a calendar, a proration method, and a date method (for rounding) with the service definition name.

Page Name	Object Name	Navigation	Usage
Service Include Category	EG_SVC_STATUS	- Set Up HRMS, Product Related, Workforce Development, Faculty Events, Service Rules, Service Include Category - Workforce Administration, Flexible Service EG, Define Service Rules, Service Definition, Service Include Category - Workforce Development, Faculty Events, Define Faculty Events Data, Service Rules, Service Include Category	Specify which HR service categories are included in the service accrual process in the selected definition name. Specify the date-rounding options for each HR category that is included on this page.
Service Add Periods Rules	EG_SVC_ADD_PERIODS	- Set Up HRMS, Product Related, Workforce Development, Faculty Events, Service Rules, Service Add Periods Rules - Workforce Administration, Flexible Service EG, Define Service Rules, Service Definition, Service Add Periods Rules - Workforce Development, Faculty Events, Define Faculty Events Data, Service Rules, Service Add Periods Rules	Define adjustments where the effective date of a status change moves forward. Select the employee records that are affected by the parameters that you set throughout the Service Rules component.
Service Adj Future (service rules – service adjust future)	EG_SVC_ADJ	- Set Up HRMS, Product Related, Workforce Development, Faculty Events, Service Rules, Service Adj Future - Workforce Administration, Flexible Service EG, Define Service Rules, Service Adj Future - Workforce Development, Faculty Events, Define Faculty Events Data, Service Rules, Service Adj Future	Define HR status history adjustments that depend on future changes in status.

Page Name	Object Name	Navigation	Usage
Service Final Handling	EG_SVC_FINAL_RND	- Set Up HRMS, Product Related, Workforce Development, Faculty Events, Service Rules, Service Final Handling - Workforce Administration, Flexible Service EG, Define Service Rules, Service Final Handling - Workforce Development, Faculty Events, Define Faculty Events Data, Service Rules, Service Final Handling	Set up final adjustments to the service amount.
Min/Max Service Rules (minimum and maximum service rules)	EG_SVC_MIN_MAX_SVC	- Set Up HRMS, Product Related, Workforce Development, Faculty Events, Service Rules, Min/Max Service Rules - Workforce Administration, Flexible Service EG, Define Service Rules, Min/Max Service Rules - Workforce Development, Faculty Events, Define Faculty Events Data, Service Rules, Min/Max Service Rules	Define adjustments that limit the number of hours or service units that can be accrued within a specific period of time.
Calculation Group	EG_CALC_GRP_DFN1	- Set Up HRMS, Product Related, Workforce Development, Faculty Events, Calculation Group - Workforce Development, Faculty Events, Define Faculty Events Data, Calculation Group	Create calculation groups to group employees who have the same calculation rules applied to their service accrual process.

Establishing a Service Calendar

Access the Calendar page.

Calendar

Calendar: 1

Computational Period

☐ Year
 ☒ Semester
 ☐ Term
 ☐ Quarter
 ☐ Month

*Descr: Academic 10

*Year Type: Acad - 10

*Months in a Year: 10

*Periods in a Year: 2

Comments: Semester Calendar

Service Information

Customize | Find | View All | First 1-4 of 21 Last

*Year	Prd.	*Begin Date	*End Date	*Period Name	*Abbrev	Prds Count		
1989	2	01/01/1990	05/31/1990	Semester 2	S2	0.50	+	-
1990	1	08/01/1990	12/31/1990	Semester 1	S1	0.50	+	-
1990	2	01/01/1991	05/31/1991	Semester 2	S2	0.50	+	-
1991	1	08/01/1991	12/31/1991	Semester 1	S1	0.50	+	-

Calendar page

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

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

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

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

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

Computational Period

Select Year, Semester, Term, Quarter, or Month as the time frame for accruing flexible service or tenure.

Year Type

Select a year type on which to base calculations. Then specify the number of months and periods in a year for this year type; for example, an academic year of 10 months divided into 4 periods (quarters).

Your system is delivered with year types *Acad-10* and *Fiscal-12*. You can make additional entries on the Translate Table.

Months in a Year

Enter the number of months in the calendar year that you are defining.

Periods in a Year	Enter the number of periods in the calendar year.
Year	Enter the calendar year that is covered by the defined calendar. For example, if the academic year 2002 comprises two semesters, one starting in September 2001 and the other in January 2002, enter 2002 in this column for both semester rows.
Prd (period)	Enter the period for the defined calendar year. Enter the calendar period numbers in sequence; for example, <i>1</i> through <i>4</i> , if you selected <i>Acad-10</i> divided into <i>4</i> periods.
Begin Date and End Date	Enter the period's start and end dates.
Period Name	Enter the period name.
Abbrev (abbreviation)	Enter an abbreviated name for the period.
Prds Count (periods count)	Using a decimal value of up to two decimal places, indicate how much the period counts toward the entire year (for example, for four periods, each period can count as 0.25 of the total year). This value is used to calculate how much credit an employee receives for working the period.

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

Defining Human Resources Actions and Categories

Access the HR Action/Reason page.

HR Action/Reason

Category Name: CAT_HIRE ***Description:** Hire Categories

Date of Action Find | View All First 1 of 1 Last

***Effective Date:** 01/01/1990 [Calendar Icon] + -

Action Information Find | View All First 1 of 1 Last

*Action	Reason	All Reasons
Hire		☒ + -

HR Action/Reason page

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

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

See [Chapter 3, "Setting Up Track Faculty Tenure," Defining the Human Resources Service Categories, page 31.](#)

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

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

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

- Action** Select the job action that should accrue toward service in this HR category. To include more than one action for this category, click the Insert Row button to add rows.
- Reason** To include reason codes for a job action and make it eligible to accrue service credits, select a reason.
- You can specify more than one reason for an action by adding a row and selecting the same action and a different reason.
- All Reasons** Select to specify that all reason codes for a job action are eligible to accrue service credits. You don't need to add a row for each reason.

See Also

Chapter 3, "Setting Up Track Faculty Tenure," [Associating a Calendar, Proration, and Date Method With a Service Definition Name](#), page 29

Associating a Calendar, Proration, and Date Method With a Service Definition Name

Access the Service Definition page.

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

Service Definition page

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

Definition Name	Displays the name that you selected. Enter a new definition name for this set of service rules in the Add-Service Rules search page.
Service Type	Displays the method used to calculate accrued service. By default, the system uses <i>Elps Time</i> (elapsed time). This method measures the time duration between two dates, taking into account the HR Action/Category event changes on the employee's job history. See Chapter 3, "Setting Up Track Faculty Tenure," Defining the Human Resources Service Categories, page 31.

Tenure Clock/Service Calendar

Calendar ID	Select the calendar ID to use for this definition name. Calendars are maintained on the Calendar page. For example, you might link the definition name <i>FACULTY</i> to a service calendar that is based on the academic year using the computational period of a semester (10 months in a year and 2 periods in a year). See Chapter 3, "Setting Up Track Faculty Tenure," Establishing a Service Calendar, page 25.
Months in a Year	Based on the Calendar ID field, the system displays the number of months per year for the selected calendar, as defined on the Calendar page. See Chapter 3, "Setting Up Track Faculty Tenure," Establishing a Service Calendar, page 25.
Computational Period	Based on the Calendar ID field, the system displays the period of time on which the service calculation is based; for example, <i>S</i> (semester). This field is populated from the selected calendar, which is maintained on the Calendar page. See Chapter 3, "Setting Up Track Faculty Tenure," Establishing a Service Calendar, page 25.
Periods in a Year	Based on the Calendar ID field, the system displays the number of periods per year for the selected calendar.
Prorate Method	
Prorate By	Select a prorate method of <i>None</i> or <i>FTE</i> (full-time equivalency), depending on the type of service being tracked.
Pro-rate if below	Enter the percentage of FTE (for example, <i>80</i>) below which you want the system to prorate accrued service. The system calculates any FTE value that is equal to or greater than this value as 1.0, for the purpose of

proration. This field isn't visible if you selected *None* in the Prorate By field. The system calculates all FTE values as 1.0.

Elapsed Time Method

Duration Option

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

See [Chapter 3, “Setting Up Track Faculty Tenure,” Setting Up Service Parameters, page 13.](#)

Date Method

Date Round Option

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

See [Chapter 3, “Setting Up Track Faculty Tenure,” Setting Up Date Rounding Rules, page 17.](#)

Date Conversion Option

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

See [Chapter 3, “Setting Up Track Faculty Tenure,” Setting Up Date Rounding Rules, page 17.](#)

See Also

[Chapter 3, “Setting Up Track Faculty Tenure,” Setting Up a Date Conversion Method, page 19](#)

Defining the Human Resources Service Categories

Access the Service Include Category page.

Service Definition		Service Include Category		Service Add Periods Rules		Service Adj Future	
Definition Name: FACULTY		Description: Faculty Tenure					
HR Status Adjustment Order							
Future Status: 3		Date Round: 1		Add Time to Date: 2			
Tenure/Service Categories Find View All First 1-4 of 4 Last							
Include/Add	*Category Type	*Category Name	Date Round Option				
☒	Hire Category	CAT_HIRE	TOPRVMTMTH	+ -			
		Hire Categories	Round to current if < 15 days				
☐	Other	CAT_LOA	TONXTMTH	+ -			
		Leave of Absence	Round to 1st of Following Mont				
☒	Other	CAT_PLA	TONXTMTH	+ -			
		Paid Leave of Absence	Round to 1st of Following Mont				
☐	Termination Category	CAT_TERM	TONXTMTH	+ -			
		Termination	Round to 1st of Following Mont				

Service Include Category page

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

See [Chapter 3, “Setting Up Track Faculty Tenure,” Defining Human Resources Actions and Categories, page 27.](#)

HR Status Adjustment Order

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

Future Status

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

See [Chapter 3, “Setting Up Track Faculty Tenure,” Defining Human Resources Status History Adjustments, page 34.](#)

Date Round

Refers to the date round options set on this page.

Add Time to Date

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

See [Chapter 3, “Setting Up Track Faculty Tenure,” Defining Time Adjustments, page 33.](#)

Tenure/Service Categories

Include/Add

Select to have the service category in the Category Name field count toward service accrual. For example, select this check box if you want *Leave of Absence* to count toward service accrual.

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

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

See [Chapter 3, “Setting Up Track Faculty Tenure,” Defining Human Resources Actions and Categories, page 27.](#)

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

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

See [Chapter 3, “Setting Up Track Faculty Tenure,” Setting Up Date Rounding Rules, page 17.](#)

Defining Time Adjustments

Access the Service Add Periods Rules page.

Service Definition Service Include Category **Service Add Periods Rules** Service Adj Future

Definition Name: FACULTY **Description:** Faculty Tenure

Find | View All First 1-2 of 4 Last

Category Name: CAT_HIRE Hire Categories + -

Record Impacted: None

Adjustment Rule

☒ **Periods to Add** Number: Unit of the Period:

Category Name: CAT_LOA Leave of Absence + -

Record Impacted: None

Adjustment Rule

☒ **Periods to Add** Number: Unit of the Period:

Service Add Periods Rules page

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

Category Name

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

See [Chapter 3, “Setting Up Track Faculty Tenure,” Defining the Human Resources Service Categories, page 31.](#)

Record Impacted

Select the instances in which a new status should receive an adjustment. When you add time to an Action/Reason effective date, you are giving additional service (or breaks) by delaying the impact of the change. For example, you grant a 30-day leave of absence adjustment for only the first leave and do not adjust any subsequent leaves.

Adjustment Rule

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

Periods to Add

Select to add time to an effective date.

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

Number

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

Unit of the Period

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

Defining Human Resources Status History Adjustments

Access the Service Adj Future page.

Service Definition | Service Include Category | Service Add Periods Rules | **Service Adj Future** ▶

Definition Name: FACULTY **Description:** Faculty Tenure

Category Find | View All First ◀ 1 of 4 ▶ Last + -

Category Name: CAT_HIRE Hire Categories

Service Information Find | View All First ◀ 1 of 1 ▶ Last + -

Service Adjustment Type: Add + -

***Service Adjustment Action Cd:** [] 🔍 **Adjust. Reason:** [] 🔍

Occurs Within: AdjWin Num: [] Type: [] Add: [] Type: []

To Current Action/Reason

Service Adj Future page

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

Adding Time to the Effective Date of a Status Change

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

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

Ignoring the Current Status Change

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

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

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

This adjustment has the following effect:

Hire	01/01/1997	Hire	01/01/1997
Leave	05/01/1997	None	
Return	05/15/1997	Return	05/15/1997

Notice that this employee's 15-day leave is ignored. Because it was less than 1 month, the system doesn't consider it a break in service.

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

Service Adjustment Type	Select from the list of options. Some of the fields that appear below this field vary, depending on the value that you select here. Select <i>Add</i> , <i>Ignore Cur</i> , (ignore current) <i>Ignore Fut</i> (ignore future) or <i>Insert</i> .
Service Adjustment Action Cd (service adjustment action code)	Select the type of service adjustment action, such as <i>HIRE</i> (hire).
Adjust. Reason (adjustment reason)	Select the reason for the adjustment, such as <i>LTDP</i> (long term disability with pay).
Occurs Within	Select the time frame in which the adjustment occurs, such as <i>D</i> (days). This field appears when you select <i>Add</i> , <i>Ignore Cur</i> , <i>Ignore Fut</i> or <i>Insert</i> in the Service Adjustment Type field.
Does Not Occur Within	Select the time frame in which the adjustment does not occur, such as <i>D</i> . This field appears when you select <i>Insert</i> in the Service Adjustment Type field.
Add	Select a time period to add to the service adjustment. This field appears when you select <i>Add</i> in the Service Adjustment Type field.
Ignore Future	Select the type of service adjustment action that is to be ignored in the future. This field appears when you select <i>Ignore Fut</i> in the Service Adjustment Type field.
Insert	Select the type of service adjustment action that is to be inserted. This field appears when you select <i>Insert</i> in the Service Adjustment Type field.
Reason	Select the action/reason code that is defined in the HR category. This field appears when you select <i>Insert</i> or <i>Ignore Fut</i> in the Service Adjustment Type field.

Setting Up a Final Adjustment to the Service Amount

Access the Service Final Handling page.

	Service Add Periods Rules	Service Adj Future	Service Final Handling	Min/Max Service Rules
Definition Name: FACULTY		Description: Faculty Tenure		
Final Result Conversion				
Final Service Result Units:		Years ▼		
Final Result Adjustment				
Add Service Amount:				
Subtract Service Amount:				
Final Service Limit				
Minimum Service Amount:				
Maximum Service Amount:		8.00		

Service Final Handling page

The adjustment or service limit on this page applies to the total service amount for the employee. For example, the maximum service cap for a service type is 8 years. Once you enter 8 in the Maximum Service Amount field, the calculation process doesn't accrue more than 8 years of service for the employee.

Final Result Conversion

Final Service Result Units Select the calendar unit, such as *Years*, that is to be used in the final conversion. *Y* is the only value that is available for Track Flexible Service and Track Faculty Events.

Final Result Adjustment

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

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

Final Service Limit

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

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

Defining Adjustments That Limit Accrual of Hours or Service Units

Access the Min/Max Service Rules page.

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

Definition Name: FACULTY **Description:** Faculty Tenure

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

Category	Description	Limit	Service
CAT_HIRE	Hire Categories	☐ Minimum ☐ Maximum ☒ None	
CAT_LOA	Leave of Absence	☐ Minimum ☐ Maximum ☒ None	
CAT_PLA	Paid Leave of Absence	☐ Minimum ☐ Maximum ☒ None	
CAT_TERM	Termination	☐ Minimum ☐ Maximum ☒ None	

Min/Max Service Rules page

These rules apply to a HR Action/Category that is based on a calendar period.

Use the scroll arrow to display more categories and rules. To add a new row, click the Insert Row button.

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

See [Chapter 3, “Setting Up Track Faculty Tenure,” Defining the Human Resources Service Categories, page 31.](#)

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

See [Chapter 3, “Setting Up Track Faculty Tenure,” Defining the Human Resources Service Categories, page 31.](#)

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

Service Enter the minimum or maximum amount of service for the selected category. This field is required if you selected Minimum or Maximum in the Limit field.

Defining Service Calculation Groups

Access the Calculation Group page.

Calculation Group

Service Calculation Group: FAC

*Function Indic.: Tenure

Description: Faculty Tenure Calc. Group

Use Start-Up: Y

Short Description: Faculty

Find | View All First 1 of 1 Last

Service Type: FACTENURE

Description: Tenure Service

☒ Service Type Active

Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900

Start Date: 01/01/1900

Stop Date:

Or Alias: EVENT_DT

*Definition Name: FACULTY

Faculty Tenure

Calculation Group page

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

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

See *PeopleSoft 8.8 Human Resources PeopleBook: Track Flexible Service*, "Calculating Flexible Service and Viewing Results," Viewing Service History Information.

Service credit is accrued against each service type. The service types are linked to a Definition Name. The Definition Name stipulates which service or calculation rules are applied during the service accrual process. Each service type has its own set of service or calculation rules based on how you set them up. The Definition Name provides a link to the service rules (the Calendar, HR Categories, and Date Rounding options).

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

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

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

Service Calculation Group	Displays the name that you entered for this calculation group in the Add (if you are creating a new calculation group) or search page. A calculation group name can be up to 6 characters.
Function Indic. (function indicator)	Select the function, or process, for which this calculation group will be used. Options are <i>Flex Srv</i> (flexible service) and <i>Tenure</i> .
Use Start-Up	Enter <i>Y</i> (yes) to include startup credits to the employee's accrued service. Startup credit is maintained on the Service Detail page for the employee. See <i>PeopleSoft 8.8 Human Resources PeopleBook: Track Flexible Service</i>, "Assigning an Employee to a Calculation Group," Entering Startup Credits and Exceptions. Enter <i>N</i> (no) to <i>not</i> include prior service credits in the calculations.
Service Type	Enter the service type to assign to this calculation group. To assign additional service types, press F7 or click the Insert Row button to add rows.
Service Type Active	Select to activate a service type for the current calculation group. If you clear the check box for a service type, that service type isn't included in the service accrual process.
Start Date	Enter a valid calendar date as the start date for this calculation group. The start date determines when the change is added to the system. Use a valid calendar date, not an alias, as the start date.
Stop Date	Enter a stop date in this field or select an alias in the Alias field. You must do one or the other.
Or Alias	If you did not enter a stop date in the Stop Date field, select an alias in this field. Or Alias is a critical field. Select the alias <i>EVENT_DT</i> (event date), which links to the job history in the calculation process. The <i>EVENT_DT</i> alias is maintained on the Database Alias page. In the case of a service calculation, the through date is used as the <i>EVENT_DT</i>.
Definition Name	Once you enter a service type for this calculation group, you must indicate the service rules definition name that the service type will use. This is where your calendar links in. The definition name (maintained on the Service Rules component) dictates what calendar is used. The definition name provides the following information to the system: Which calendar to use. Which date rounding and proration methods to use. What service categories (action/category code groupings) are eligible for inclusion in the service calculation process.

See Also

Chapter 3, "Setting Up Track Faculty Tenure," Setting Up a Database Alias, page 20

Setting Up Tenure Tracking

This section discusses how to:

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

Pages Used to Set Up Tenure Tracking

Page Name	Object Name	Navigation	Usage
Academic Rank	EG_RANK_TBL	• Set Up HRMS, Product Related, Workforce Development, Faculty Events, Academic Rank • Workforce Development, Faculty Events, Define Faculty Events Data, Academic Rank	Establish academic ranks, tenure tracking eligibility for those ranks, and probationary periods. Before using this page, set up the Calculation Group page.
Experience/Credit Codes	EG_EXP_DFN	• Set Up HRMS, Product Related, Workforce Development, Faculty Events, Experience/Credit Codes • Workforce Development, Faculty Events, Define Faculty Events Data, Experience/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.

Establishing Academic Ranks

Access the Academic Rank page.

Academic Rank

Academic Rank: 001

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

*Effective Date: 01/01/1990 *Status: Active

*Description: Professor Rank-IPEDS: Professor

Short Description: Prof

☒ Eligible for Tenure Tracking

Tenure Tracking Eligibility

Service Calculation Group: FAC ☐ Partial Credit Allowed

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

Academic Rank page

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

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

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

Service 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.

Partial Credit Allowed

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

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

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

Carry Automatic Tenure

Select 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

Experience or Credit Code Information	Find 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.

Assigning an Employee to Tenure

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

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

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.

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 8.8 Application Fundamentals for HRMS PeopleBook, “Setting Up Organization Foundation Tables,” Enabling and Controlling Department Information for Specified Customers

Pages Used to Assign an Employee to Tenure

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

Miller, Gerard ID: K0G013

*Tenure Status: Tenure Home Rank: 004 Lecturer

Track Start Date: 07/23/2002 Change Date: 07/23/2002 Change Reason: Retro Adj

Original Track Date: 8/01/1998 *Tenure Home: 13000 Finance Grant Tenure: N

Service Calc. Group: FAC Mandatory Review Dt: Granted Date:

☐ Override Calculation Committed FTE: Notes

Probation (Number of Years)

Total Required:	0.000000	Time Accrued:	0.000000	Current As Of Date:
Extended By:	0.000000	Time To Accrue:	0.000000	☐ Terminal Year

Other Tenure Departments List

Department	Description	Grant	Rank	Rank Description	Tenure Status	Effective Date	FTE
1 10000	Human Resources	N	001	Professor	On Track	08/24/2002	

Tenure Data page

Tenure Status

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

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

Home Rank

This value 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 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 09/01/2000, then the calendar begin date must be 09/01/2000. For this reason, you might define calendars only to accommodate track start dates.

Change Date and 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 Change Reason field does not display a default, select one of the options in the Tenure Status field.

Original Track Date

Displays the date tenure tracking begins for the employee. The default is the track start date.

Tenure Home	Displays the department granting the employee's tenure. This value is automatically populated from the employee's current Job record.
Grant Tenure	This display-only check box is selected if the Tenure Home field displays the department granting the tenure status.
Service Calc. Group (service calculation group)	Select the group used to calculate tenure accrual.
Mandatory Review Dt (mandatory review date)	Enter the employee's mandatory review date.
Granted Date	Enter the date tenure was granted.
Override Calculation	Select if you do not want this employee to be included in the tenure calculation process.
Committed FTE (committed full-time equivalent)	Enter the percentage of time the employee is a committed FTE. This enables you to track the tenure FTE committed for budgetary reasons. The 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 link to enter notes regarding the employee's tenure.

Probation (Number of Years)

Total Required	Displays the total number of probationary years required before granting tenured status. This value is automatically populated from the Academic Rank Table.
Time Accrued	Displays the number of accrued probationary years. This value populates the Tenure Data – Service History page.
Current As Of Date	Displays the end date of the last processed computational period.
Extended By	Enter the number of years by which the probationary period is extended for this employee, if appropriate.
Time To Accrue	Displays the remaining probationary years the employee must accrue.
Terminal Year	Select when the employee is in the last year of probation. For example, if the total of required probationary years is 8 and the time to accrue is 1, select this check box. The Time Accrued and Time To Accrue fields display 0 years when you select this check box.

Other Tenure Departments

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

Department

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

Note. If the check box next to the Department 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 Date

Enter the date the tenure status is effective.

FTE (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																								
Miller, Gerard															ID: K0G013																													
Hire Date: 05/01/1998															Per Status: E Employee															Highest Education Level: A-Not Indicated														
Summary Totals																																												
Total Time Required: 0.000000										Total Time Accrued: 0.000000										Prior: 0.000000										Time To Accrue:														
Prior Experience/Credit																																												
Customize Find View 1 First 1-3 of 3 Last																																												
*Exp / Credit	Description	From Date	To Date	Credit Granted	Add to Tenure	Rank	Rank Description	Notes																																				
1	PUNV	Prior University Experience	04/12/2001																																									
2	PRSH	Prior Research Experience	11/14/2000	03/05/2001																																								
3	PRSH	Prior Research Experience	07/12/1999	09/25/2000																																								

Prior Experience/Credits page

Hire Date

Displays the date the employee was hired.

Per Status

Displays the employee's status, such as *Employee* or *Contractor*.

Highest Education Level

Displays the employee's highest level of education.

Summary Totals

Total Time Required	Displays the total number of service years required to receive tenure. This value is automatically populated from the Total Required field on the Tenure Data page.
Total Time Accrued	Displays the total number of service years accrued toward tenure. This value is automatically populated from the Time Accrued field on the Tenure Data page. The number changes if you make an online adjustment to the service history.
Prior	Displays the total number of years from prior employment that count toward tenure service (calculated to two decimal places).
Time To Accrue	Displays the number of years remaining to accrue tenure status. This value is automatically populated from the Time To Accrue field on the Tenure Data page. The number of years remaining to accrue tenure status changes if you make an online adjustment to the service history.

Prior Experience/Credit

Exp/Credit (experience/credit)	Select the employee's previous experience or credit type, such as <i>RSHR</i> (research).
From Date and To Date	Enter the beginning and ending dates of the experience or credit.
Credit Granted	Enter the amount of credit granted for the prior experience.
Add to Tenure	Select this check box to add these credits to tenure accrual.
Rank	Select the rank at which the credits were granted, such as <i>005</i> (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
Tenure Home: 90310
Track Start Dt: 02/01/1995

Tenure Status: NTK On Track
Override Calc:

PU018
Calc Group: FAC
Tenure Granted Date:

Home Department Rank/Status Change History
Find | View All First ◀ 1 of 1 ▶ Last

Eff Date	Academic Rank	Tenure Status	Action Date	Change Reason
02/01/1995	001 Professor	NTK On Track	05/31/2000	

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

Home Department Rank/Status Change History

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

Viewing Related Jobs

Access the Related Jobs page.

Related Jobs

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

Jobs Counted for Tenure Accrual

[Find](#) | [View All](#) First ◀ 1 of 1 ▶ Last

Empl Rcd#	FTE For Accrual	Current Department	Job Code	Position
0	0.50	90310 Electrical Engineering	720000 Professor	PUU6027

Related Jobs page

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

Jobs Counted for Tenure Accrual

Empl Rcd# (employee record number)	Maintain this number in the Job Data component.
FTE For Accrual	Displays the employee's FTE value, such as .80 for an employee working 80 percent of a normal full-time schedule. Maintain the FTE for accrual on the 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

This section provides an overview of the tenure calculation process and discuss how to:

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

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.

- 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.

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

See Also

Chapter 3, "Setting Up Track Faculty Tenure," Setting Up Service Parameters and Service Accrual Control Tables, page 9

Pages Used to Run the Tenure Calculation Process

Page Name	Object Name	Navigation	Usage
Batch Tenure Calc (batch tenure calculation)	RUNCTL_EGPP01	Workforce Development, Faculty Events, Calculate Tenure, Perform Tenure Calculations, 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	- Workforce Administration, Flexible Service EG, Message Log, Message Log - Workforce Development, Faculty Events, Calculate Tenure, Review Processing Messages, Message Log	View dated and timed information about calculation processes. Track errors in processes and searches for error messages associated with a particular run.
Periodic Process	EG_PRDIC_RSLTS	- Workforce Administration, Flexible Service EG, View Periodic Results, Periodic Process - Workforce Development, Faculty Events, Calculate Tenure, Review 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	Workforce Development, Faculty Events, Calculate Tenure, Review 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.
Service History	EG_SVC_HIST	Workforce Development, Faculty Events, Calculate Tenure, Create Tenure Data, Service History	Maintain service history for employees and enter service adjustments and codes. Maintain adjustment action/reason codes on the HR Action/Category page.

Calculating Tenure

Access the Batch Tenure Calc page.

Batch Tenure Calc

Run Control ID: 123 [Report Manager](#) [Process Monitor](#) **Run**

From Date:

To Date:

*Calc Group:

EmplID:

Tenure Processing Type

Periodic Processing Mode - EG

☐ Delete old Calc Results
☒ Delete & Reload History
☐ Commit to History

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. 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 (calculation 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.

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.

Periodic Processing Mode - EG

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

Delete & Rebuild History: Select this mode to regenerate tenure service for an individual employee (or all employees) within a tenure calculation group. None of the adjustments that you entered on the Tenure Data - Service History page re-accrue. You must reenter 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 option 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 option.

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

Update to History: Select this option to update the Tenure Data – Service History page. The results from using Normal Run become the input data for this option. When you select this option, the system selects the Commit to History check box.

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

Viewing the Message Log

Access the Message Log page.

The screenshot shows the 'Message Log' page with a search bar and a table of messages. The search bar includes fields for 'Search Criteria' (set to 'Instance'), 'Process Instance' (set to '1'), 'To Instance' (set to '1'), and 'Job ID' (empty). There is a 'Show Program Names' checkbox and a magnifying glass icon. The table below shows four messages, all from 'APP ENGINE' at '10/29/2002 12:03:57PM'. Each message is an 'Updating' action for a specific program name, with a progress indicator and a document icon.

Instance	Job ID	DateTime	Program Name
1	APP ENGINE	10/29/2002 12:03:57PM	Updating 1 of 58 - PS_ARCH_PRO J (0,0)
1	APP ENGINE	10/29/2002 12:03:57PM	Updating 2 of 58 - PS_PROCSDEFN (0,0)
1	APP ENGINE	10/29/2002 12:03:57PM	Updating 3 of 58 - PS_PROCSJOBDEFN (0,0)
1	APP ENGINE	10/29/2002 12:03:57PM	Updating 4 of 58 - PS_PROCSRECUR (0,0)

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 background 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.

Date Time

Displays the date and time the program ran.

Program Name

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



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

Viewing Periodic Process Results

Access the Periodic Process page.

Periodic Process											
Run Control ID:	Faculty	Run Date:	06/05/2000								
Process Instance:	541	Run Status:	Complete with no Errors								
To Date:	12/31/1998	Periodic Cycle:									
Service Calculation Group:	FAC	Process Mode:	Normal Run								
Calculate All Groups:	N	Name:									
Delete & Reload History:	N	Delete old Calc Results:	Y								
		Commit to History:	N								
Find View All First ◀ 1 of 1 ▶ Last											
Calc Group:	FAC	Employees Processed:	7								
Service Type:	FACTENURE	Employees with Errors:	7								
Find View All First ◀ 1-3 of 7 ▶ Last											
<table border="1"> <thead> <tr> <th colspan="2">Employees with Errors</th> </tr> </thead> <tbody> <tr> <td>PJ015</td> <td>Wysocki,Wendy</td> </tr> <tr> <td>PJ016</td> <td>Honda,Dennise</td> </tr> <tr> <td>PJ018</td> <td>Niko,Noreen</td> </tr> </tbody> </table>				Employees with Errors		PJ015	Wysocki,Wendy	PJ016	Honda,Dennise	PJ018	Niko,Noreen
Employees with Errors											
PJ015	Wysocki,Wendy										
PJ016	Honda,Dennise										
PJ018	Niko,Noreen										

Periodic Process page

Run Date

Displays the date the calculation process ran.

Process Instance	Displays the calculation process instance number.
Run Status	Displays basic information about the calculation process, including whether the system encountered problems.
To Date	Displays the end date of the period covered in this calculation process.
Periodic Cycle	Displays the periodic cycle for this run control ID.
Process Mode	Displays the period processing mode from the Batch Tenure Calc page (for Track Faculty Events) or the Service Calc page (for Track Flexible Service).
Service Calculation Group	Displays the calculation group included in this calculation process run.
Name	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.
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:	lk
Calculation Name:	LK	From Date:	01/01/1995
		To Date:	12/31/1997

Find View All First 1-2 of 6 Last					
Begin/End Date	Service Amt without Breaks	Service Amt with Breaks	Service Adjustment	Accrued Service	Accum Breaks
01/01/1995	0.300000	0.300000	0.000000	0.300000	0.000000
05/31/1995		Action: HIR ()		Breaks:	0.000000
EmplID:	PJ015	Wysocki,Wendy			
08/01/1995	0.500000	0.500000	0.000000	0.800000	0.000000
12/31/1995		Action: HIR ()		Breaks:	0.000000
EmplID:	PJ015	Wysocki,Wendy			

Tenure Calc Summary page

From Date and To Date	Displays the dates between which the tenure calculation process ran.
Begin/End Date	Displays the beginning and ending dates for this calculation process.
Service Amt without Breaks (service amount without breaks)	Displays the amount of service without breaks that counts toward tenure.
Service Amt with Breaks (service amount with breaks)	Displays the amount of service with breaks that counts toward tenure.
Accrued Service	Displays the total amount of accrued service time.
Accum Breaks (accumulated breaks)	Displays the total amount of accumulated breaks in service.
Note. If the employee has existing service history, the total service amount comes forward in an entry with an action of <i>BFW</i> . Begin and end dates for the entry show the date prior to the from date of the period specified on the 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 Service History page.

Tenure DataPrior Experience/CreditsService History

Miller, GerardID: K0G013

Total Time Required:0.000000Total Time Accrued:0.000000Prior:0.000000Time To Accrue:

Detail InformationFind | View AllFirst1 of 1Last

Begin Date	End Date	Service w/o Breaks	Total Service Accrued	Accum Breaks	Rank	Calc Group	Gen /Adj
		0.000000	0.000000	0.000000	004	FAC	A

Action:Reason Code:Adjustment Reason:RecalcNotes

Service History page

- Total Time Required

Displays the total number of service years required from the Tenure Data page.
- Total Time Accrued

Displays the number of years accrued toward tenure.
- Prior

Displays tenure credits for prior experience from the Prior Experience/Credits page.
- Time to Accrue

Displays the remaining number of years before tenure is granted.
- Begin Date and End Date

Displays the beginning and ending dates of the tenure in this calculation process. You cannot change these dates if the service history for the period already exists.
- Service w/o Breaks (service without breaks)

Displays the percent of FTE accrued without service breaks.
- Total Service Accrued

Displays the total percentage of services accrued. This field increases incrementally when the calculation process is run.
- Accum Breaks (accumulated breaks)

Displays the accumulated service breaks.
- Rank

Displays the rank for the calculation group.

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

CHAPTER 4

Tracking Events

This chapter discusses how to:

- Track faculty events
- Track committee information.

Tracking Faculty Events

This section discusses how to:

- Track an employee's activities.
- Set up administrative posts.
- Track administrative posts, title, and appointments.
- Track school education.
- Track professional education and training.
- Track honors and awards.
- Track licenses and certifications.
- Track memberships in professional organizations.
- Track publications.
- Track significant special projects.
- Track student advisees.
- Track a faculty member's 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.

Pages Used to Track Faculty Events

Page Name	Object Name	Navigation	Usage
Activities	EG_ACTIVITIES	Workforce Development, Faculty Events, Track Events, Activities, Activities	Track employee activities.
Administrative Post Table	EG_ADMIN_POST_TBL	- Set Up HRMS, Product Related, Workforce Development, Faculty Events, Administrative Posts, Administrative Post Table - Workforce Development, Faculty Events, Define Faculty Events Data, Administrative Posts, Administrative Post Table	Set up administrative posts.
Administrative Posts	EG_ADMIN_POSTS	Workforce Development, Faculty Events, Track Events, Administrative Posts, Administrative Posts	Track administrative posts and appointments and titles that you do not want to track in the Job Data component. Before using this page, set up the Administrative Post Table page.
School Education	EG_SCHOOL_EDUCAT	Workforce Development, Faculty Events, Track Events, Education, School Education	Track educational background. Use this information to determine employee abilities for career and tenure planning.
Professional Ed. and Training (professional education and training)	EG_EDUCAT_TRAIN_GB	Workforce Development, Faculty Events, Track Events, Education, Professional Ed. and Training	Track professional education and training.
Honors & Awards	EG_HONORS_AWARDS	Workforce Development, Faculty Events, Track Events, Honors and Awards, Honors & Awards	Track honors and awards.
Licenses and Certifications	EG_LICENSE_CERTIFS	Workforce Development, Faculty Events, Track Events, Licenses and Certifications, Licenses and Certifications	Track licenses and certificates.
Memberships	EG_MEMBERSHIPS	Workforce Development, Faculty Events, Track Events, Memberships, Memberships	Track memberships.

Page Name	Object Name	Navigation	Usage
Presentations	EG_PRESENTATIONS	Workforce Development, Faculty Events, Track Events, Presentations, Presentations	Track presentations.
Publications	EG_PUBLICATIONS	Workforce Development, Faculty Events, Track Events, Publications, Publications	Track publications.
Significant Special Projects	EG_SPECIAL_PROJECT	Workforce Development, Faculty Events, Track Events, Significant Special Projects, Significant Special Projects	Track special projects.
Student Advisement	EG_ADVISEMENT	Workforce Development, Faculty Events, Track Events, Student Advisement, Student Advisement	Track student advisement.
Teaching Responsibilities	EG_TEACHING_RESP	Workforce Development, Faculty Events, Track Events, Teaching Responsibilities, Teaching Responsibilities	Track teaching responsibilities.

Tracking an Employee's Activities

Access the Activities page.

Activities

Niles, William

ID: PU018

Tenure/Home Dept: 90310

Tenure Status: On Track

Academic Rank: Professor

Activities

Find | View All First 1 of 1 Last

Activity Type: Scholarly Research

Activity: Research

Sponsor: Department

Internal/External: Internal

From Date: 03/01/1999

Thru Date: 11/13/2000

*Compensated: 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:

Chair

Post Type:

Academic Responsibility

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)

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

Tracking Administrative Posts, Titles, and Appointments

Access the Administrative Posts page.

Administrative Posts

Niles, William **ID:** PU018

Tenure/Home Dept: 90310

Academic Rank: Professor **Tenure Status:** On Track

Administrative Posts Find | View All First 1 of 1 Last

***Administrative Post:** Chair Chair + -

Post Type: Academic Responsibility

***Appointment Type:** Initial Appointment

Description: Chair of Admissions Board

***From Date:** 09/01/1999 **End Date:**

Revision Date: **Reason:**

SetID: PSUSI **Department:** 90310 Electrical Engineering

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 School Education

Access the School Education page.

School Education		Professional Ed. and Training	
Niles,William		ID: PU018	
Country:	USA		
School Type:	UNK Unknown	Level Achieved:	DEG Degree
Date Acquired:	06/06/2002		
Average Grade:	4.0	☒ Completed	
School Code:	F00001	School Name:	Berkeley, University of CA
State:	CA California		

Area of Study		Customize Find View 1		First	1 of 1	Last
	*Area of Study	Grade				
1	Computer Science	4.0				

School Education page

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

Completed Select this check box if the program is complete.

Tracking Professional Education and Training

Access the Professional Ed. and Training page.

School Education		Professional Ed. and Training	
Niles,William		ID: PU018	
Professional Education Find View All First 1 of 1 Last			
Country:	USA	United States	
*Degree:	BS	Bachelor of Science	☐ Terminal Degree
Date Acquired	05/13/1982	Average Grade:	3.25 ☒ Graduated
Major Code:	K000012	Major:	Mechanical Engineering
School Code:	KUS021	School:	Georgetown University
Educator:			
State:	DC	District of Columbia	☐ Minority Institution

Training		Customize Find View All		First	1 of 1	Last
	Course Title	School Name	Start Date	End Date		
1						

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 Honors and Awards

Access the Honors & Awards page.

Honors & Awards

Niles, William
ID: PU018

Honors and Awards									
Customize Find View All									
First ◀ 1-3 of 3 ▶ Last									
	*Honor or Award		Grantor	Issue Date	End Date				
1	BOD		Board of Directors Appointment	Bill Haley	01/15/1999				
2	CSS		Community Service Award	David Petrillo	03/21/2001				
3	NMS		National Merit Scholarship	Evan Jones	05/09/2002				

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 Licenses and Certifications

Access the Licenses and Certifications page.

Licenses and Certifications

Niles,William

ID: PU018

Licenses and Certifications

Find | View All First 1 of 1 Last

*License/Certificate Code:

SRP

Search

Safety Recognition Program

+

-

Issue Date:

03/29/1996

BT

License #:

123456

Issued By:

WH Safety Board

Expiration Date:

03/29/1998

BT

☒ License Verified

☒ Renewal in Progress

Issued In

Country: USA

State:

Licenses and Certifications page

License/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 Memberships in Professional Organizations

Access the Memberships page.

Memberships

Niles,William

ID: PU018

Memberships

Customize | Find | View All | 1-3 of 3 Last

	*Organization	Description	Membership Date	Mandate	Mandate Position	Mandate Begin Date	Mandate End Date		
1	AIT	Association Intl Toastmasters	02/13/1991					+	-
2	CBP	Certified Benefits Professionals	11/24/1998					+	-
3	AGM	Alliance of Gov't Managers	09/26/2002					+	-

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 Publications

Access the Publications page.

Publications

Niles, William ID: PU018

Publication Information Find | View All First 1 of 1 Last

*Publication Number: + -

Publication Type: Author Type:

Publication Title:

Publication Name:

Publisher:

Publication Information

☒ **Date Format For PowerPlay** Date:

Volume: Issue: Page Number(s):

Notes:

Publications page

Date Format For PowerPlay and Date

Select to enter the publication date in the format *MM/DD/YYYY*. Clear this check box 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: 90310	
Academic Rank: Professor	Tenure Status: On Track
Special Projects Find View All First 1 of 1 Last	
*Date Completed:	04/28/1988
Department:	90310
Organization:	Science World / State University
Description:	Supervising professor to engineering students setting up exhibit at Science World

Significant Special Projects page

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

Tracking Student Advisees

Access the Student Advisement page.

Student Advisement	
Niles,William	ID: PU018
Tenure/Home Dept: 90310	
Academic Rank: Professor	Tenure Status: On Track
Student Advisement Find View All First 1 of 1 Last	
*Student Name:	Brady,Shawn
Advisement Level:	Master's Thesis
From Date:	09/01/1998
Thru Date:	10/15/2000
Project:	Electrical Engineering in the New Millenium
Date Due:	11/30/2000
Comments:	

Student Advisement page

Student Name

Enter the student advisee's name in the following format:
Last Name, First Name.

Tracking a Faculty Member's Teaching Responsibilities

Access the Teaching Responsibilities page.

Teaching Responsibilities	
Niles, William	ID: PU018
Tenure/Home Dept: 90310	
Academic Rank: Professor	Tenure Status: On Track
Teaching Responsibilities Find View All First 1 of 1 Last	
*Course ID: 1357	+ -
Title: The Future of Electrical Engineering	
Course Type: Discussion	Units: 3
Term: 1 Year: 2000	☐ Team Taught Percent: 50.00
Enrollment Information Find View All First 1 of 1 Last	
Enrollment Type: UnderGrad	Number Enrolled: 45
	+ -

Teaching Responsibilities page

Course ID (course identification)

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

Term

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

This section discusses how to:

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

Pages Used to Track Committee Information

Page Name	Object Name	Navigation	Usage
Committee Type	EG_COMMITTEE_TABLE	- Set Up HRMS, Product Related, Workforce Development, Faculty Events, Committee Type, Committee Type - Workforce Development, Define Faculty Events Data, Committee Type, Committee Type	Maintain committee types and committee roles within each type.
Committee	EG_COMMITTEE	- Set Up HRMS, Product Related, Workforce Development, Faculty Events, Committees, Committee - Workforce Development, Faculty Events, Define Faculty Events Data, Committees, Committee	Establish a committee and attach a committee type.
Committee Members	EG_COMMITT_MEMBRS	- Set Up HRMS, Product Related, Workforce Development, Faculty Events, Committees, Committee Members - Workforce Development, Faculty Events, Define Faculty Events Data, Committees, Committee Members	Assign employees to a committee.
Employee Committees	EG_COMM_MBR_VW	Workforce Development, Faculty Events, Review Committee Membership, Employee Committees	View the committees to which an individual employee belongs. This page is display-only.

Setting Up Committee Types

Access the Committee Type page.

Committee Type

Committee Type: SOCIAL

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

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

***Description:** Social Events

Short Description: Social

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

***Committee Role:** Staff

***Description:** Social Planners

Short Description: Planners

Committee 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, and not to existing committee types.

Establishing Committees

Access the Committee page.

Committee **Committee Members**

Committee: SOCIAL

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

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

***Committee Name:** Social Events

Committee Type: SOCIAL Social Events

Description: Coordinate staff and student social events.

Committee page

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

Assigning Committee Members

Access the Committee Members page.

The screenshot shows the 'Committee Members' page. At the top, there are tabs for 'Committee' and 'Committee Members', with 'Committee Members' being the active tab. Below the tabs, the committee name 'SOCIAL Social Events' is displayed. The page is divided into two main sections: 'Committee Type Information' and 'Member Information'. The 'Committee Type Information' section shows the committee type as 'SOCIAL Social Events' and its status as 'Active'. The 'Member Information' section shows a list of members, with the first member being 'Niles, William' with employee ID 'PU018'. The role is 'Social Planners' and the start date is '01/04/2000' and end date is '01/03/2001'.

Committee Members page

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

Role Select the role of the committee member.

Start Date and End Date Enter the beginning and ending dates of the committee membership.

CHAPTER 5

Managing Cases

This chapter discusses how to define and review employee cases.

Defining and Reviewing Employee Cases

This section discusses how to:

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

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

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.

Pages Used to Define and Review Employee Cases

Page Name	Object Name	Navigation	Usage
Case Review	EG_CASE_REVIEW	Workforce Development, Faculty Events, Manage Cases, Identify Employee Case, 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	Workforce Development, Faculty Events, Manage Cases, Case Information, Review Path	Review case information by selecting the employee and the case ID that you want to review.
Case View	EG_CASE_REVIEW_VW	Workforce Development, Faculty Events, Manage Cases, Case Progress, Case View	View the less sensitive information from the Case Review and Review Path pages. This page is display only.
Case Final Status	EG_CASE_FIN_VW	Workforce Development, Faculty Events, Manage Cases, Review Case 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.
Faculty Events Report	RUNCTL_EVENTS	Workforce Development, Faculty Events, Track Events, Faculty Events Hist Rpt, Faculty Events Report	List all tracking events for the employee specified, including activities, administrative posts, appointments and titles, education, training and so on.

Defining the Purpose of a Case

Access the Case Review page.

Case Review

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

Case Information Find | View All First 1 of 2 Last
***Case ID:** P001 ***Case Type:** Title ***Case Status:** Disapprove + -

Proposed
Tenure Status: Not on Trk **Academic Rank:**
Title: Professor **FTE:** 1.000000
Annual Rate: 40000.000 **Begin Date:** 01/01/1996
☐ **Outside Offer Details:**
☐ **Forward Case Portfolio**
Notes/Portfolio Description:

Case Review page

- Case ID** (case identification) Enter a unique case identification number for the employee.
- Tenure Status** Displays the employee's tenure status from the Tenure Data page.
- Annual Rate** Displays the employee's current annual salary from the Job Data component.

Proposed

- 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			
Niles, William		ID:	PU018
Tenure/Home Dept:	90310	Electrical Engineering	Annual Rate:
Academic Rank:	Professor		Tenure Status:
Case ID:	P001	Case Type:	Title
		Case Status:	Disapprove
Recommendation Find View All First 1 of 2 Last			
*Review Dept:	90310	*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:	90310	Electrical Engineering	
Final Action	☒	Next Case Type:	Tenure
Next Review Date:	12/01/1998		
Notes:			

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

Step

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

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

Reviewer EmplID (reviewer employee identification)

Select the employee ID of the person reviewing the case.

Reviewer Team

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

Case Received Date

Enter the date the reviewer received the case.

Recommendation Date

Enter the date the reviewer made the recommendation.

Recommendation

Select the proposed action for the case. For example, select *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.

Viewing Case Data and Recommendations

Access the Case View page.

Case View

Niles,William
ID: PU018

Tenure/Home Dept: 90310
Annual Rate: 40000.000

Academic Rank: Professor
Tenure Status: On Track

Proposed

Find | View All First 1 of 2 Last

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

Tenure Status: Not on Trk Acad Rank:

Title: Professor FTE: 1.000000

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

Recommendation

Find | View All First 1 of 2 Last

Review Dept: 90310 Step: 2

Reviewer EmplID:

Reviewer Team: Board of Directors

Case Received Date: 06/01/1998 Recommendation Date: 06/01/1998

Forward Department: 90310 Forward Dt: 06/01/1998

Final Action ☒ Next Case Type: Tenure Next Review Date: 12/01/1998

Case View page

View the less sensitive information from the Case Review and Review Path pages. This page is display-only.

Reviewing Case Status

Access the Case Final Status page.

Case Final Status	
Niles, William	ID: PU018
Tenure/Home Dept: 90310	Annual Rate: 40000.000
Academic Rank: Professor	Tenure Status: On Track
Case Final Information	
Find View All	First 1 of 1 Last
Case ID:	Case Type:
Tenure Status:	Academic Rank:
Title:	FTE:
Begin Date:	
☐ Outside Offer	Details:
Notes:	

Case Final Status page

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.

Generating the Faculty Events History Report

Access the Faculty Events Report page.

Faculty Events Report	
Run Control ID: 123	Report Manager Process Monitor Run
Report Request Parameters	
EmplID: 0002	Allerseelen, Gregor

Faculty Events Report page

Run Control ID

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

EmplID

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

Run

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

CHAPTER 6

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

This chapter provides an overview of the Statistics Canada (StatsCan) Academic Teaching Surveys business process and discusses how to:

- Set up the Statistics Canada Academic Teaching Surveys business process.
- Load and modify data in the FT Academic Teaching Member Table.
- Load data into the Academic Teaching Survey Tables.
- View and modify survey results.
- Create the survey report flat files.
- Verify survey results with Statistics Canada.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports,” Track Faculty Events Reports

Understanding the Statistics Canada Academic Teaching Surveys Business Process

Track Faculty Events business process provides the functionality to create the legislatively required Academic Teaching Survey 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 values in the Faculty Code Table.
- Job Code component: StatsCan Teaching Survey Codes.
- Company Table: StatsCan Institution Code.
- Country Table: Statistics Canada Location Code.

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

- Canadian Tax Table: StatsCan Province Code.

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

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

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook

Setting Up Track Faculty Events Tables

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

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

See Also

Chapter 3, “Setting Up Track Faculty Tenure,” Establishing Academic Ranks, page 41

Chapter 4, “Tracking Events,” Setting Up Administrative Posts, page 64

Setting Up the Statistics Canada Academic Teaching Surveys Business Process

This section discusses how to:

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

Pages Used to Set Up the Canadian Teaching Surveys Business Process

Page Name	Object Name	Navigation	Usage
Principal Subjects Taught	HP_STATS_SUBJECTS	Set Up HRMS, Product Related, Workforce Development, Faculty Events, Principal Subjects Taught, Principal Subjects Taught	Maintain Statistics Canada principal subjects taught codes and descriptions.
Faculty Code Table	HP_STATS_FACULTY	Set Up HRMS, Product Related, Workforce Development, Faculty Events, Faculty Code Stats CAN, 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	Set Up HRMS, Product Related, Commitment Accounting, Fringe Costs CAN, Non-Operational Funds Table, Non-Operation Funds Table	Identify non-operational funding sources. This table is for Ontario universities only.
Reporting Period Table	HP_RPTNG_PRD_PNL	Set Up HRMS, Product Related, Workforce Development, Faculty Events, Reporting Period Stats CAN, 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: 61200

***Description:** Mechanical Engineering

Short Description: Mech. Eng.

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:

000000001

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

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: 06/14/2002 (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, Other Paid Leave, Workload Reduction, and Unpaid Leave

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

FT Filename (full-time filename)

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

For Part-Time Survey

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

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

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

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

Loading and Modifying Data in the FT Academic Teaching Member Table

This section provides 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.

Part-time 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

Page Name	Object Name	Navigation	Usage
Load FT Teaching Member Data (load full-time teaching member data)	RUNCTL_HPH900CN	Workforce Development, Faculty Events, Load Teaching Data CAN, Load FT Teaching Member Data, Load FT Teaching Member Data	Load teaching member data into the FT Academic Teaching Member Table.
Member Data	HP_FT_TEACH_MEMBER	Workforce Development, Faculty Events, Qualify Academic Teaching CAN, Full-Time Member, Member Data	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: GN2
 [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 8.8 Human Resources PeopleBook: Administer Workforce, “Hiring Your Workforce,”
Entering Employee Job Location and Position Information

Maintaining Teaching Member Records

Access the Member Data page.

Member Data

Niles,WilliamEmployeeEmplID: PU018

Member InformationFind | View AllFirst1 of 1Last

*Reporting Year:2002

Reportable Employment Rcd Nbr:0

Canadian Resident StatusVisiting Faculty

*Previous Employment:Military

Previous Employment Province:Stats-Can Province Code:

*Previous Employment Country:BRBStats-Can Country Code:04623

*Salary Status:Regular

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

This section provides an overview of the Load Teaching Survey Data process and discuss how to load FT 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*).

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.

Pages Used to Load Data Into the Academic Teaching Survey Tables

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

Loading FT Survey Data

Access the FT Survey page.

FT Survey

PT Survey

Run Control ID: GN5

[Report Manager](#)
[Process Monitor](#)

Run

Reporting Period: 1999

Start Date: 01/08/1999

End Date: 01/07/2000

EmpID:

HR Action/Categories

Sabbatical: CAT_PSB

Workload Reduction: CAT_PAY

Unpaid Leave: CAT_LOA

Other Paid Leave: CAT_PLA_SC

Administrative Stipend Earnings Codes

[Customize](#) | [Find](#) | [View All](#) |

First 1 of 1 Last

Earnings Code	Description
1 QBA	Bonus/Award

FT Survey page

Sabbatical, Workload Reduction, Unpaid Leave and Other Paid Leave

Displays the HR Action/Categories from the Reporting Period Table.

Earnings Code

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

Viewing and Modifying Survey Results

This section discusses how to:

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

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.

Pages Used to View and Modify Academic Teaching Survey Results

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

Viewing FT Survey Results (Part 1)

Access the FT Survey Part 1 page.

FT Survey Part 1		FT Survey Part 2	
Niles, William		Employee	
		EmplID: PU018	
FT Survey Information		Find 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			
		Level of Highest Degree:	No Degree/Diploma/Prof.Desgntn
Year of First Degree:	9998	Year of Highest Degree:	9998
Province of First Degree:	99899	Province of Highest Degree:	99899
Stats-Can Citizenship			
Country Code:	99999	Immigrtn Status:	Unknown

FT Survey Part 1 page

FT Survey Information

Year of Appointment

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

Previous Employment Location

Displays the employee's previous employment location from the Member Data page.

Reporting Institution

Displays the Statistics Canada reporting institution from the Company Table.

Previous Employment

Displays the employee's previous employment from the Member Data page.

Stats-Can Dept Code (Statistics Canada department code)

Displays the Statistics Canada code associated with the department of the primary reported job from the Department Table.

Degree Earned

Year of First Degree

Displays the year the employee received his or her first degree from the Professional 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 (Statistics Canada citizenship country code)

Displays the Statistics Canada citizenship country code associated with the employee's country of citizenship from the Citizenship/Passport page.

Maintain country codes in the Country Table.

Immigrtn Status
(immigration status)

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

Viewing FT Survey Results (Part 2)

Access the FT Survey Part 2 page.

FT Survey Part 1		FT Survey Part 2	
Niles, William		Employee	
		EmplID: PU018	
FT Survey Information			
Find 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
Administrative Stipends:		Salary Status:	Regular
Ontario Final Rate of Salary:		Months Not On Leave	9
Ontario Salary Source:	00	Months On Sabbatical	
Percentage of Load Reduction:		Months On Other Paid Leave	
		Months On Unpaid Leave	3
		12 Total Months	
		Last Load Date:	06/01/2000
		Last Date Changed:	06/01/2000
		Last Date Reported:	

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 non-operational funding accounts, excluding administrative stipend amounts.

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

The system calculates this value as follows:

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

Months Not On Leave, Months On Sabbatical, Months On Other Paid Leave, and Months On Unpaid Leave Displays the number of months the employee was on this type of leave during the reporting year, based on the Action/Reason field in the Job Data component and the HR Action/Categories on the Reporting Period Table page.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, “Hiring Your Workforce,” Entering Optional Employment-Related Data

Viewing PT Survey Results (Part 1)

Access the PT Survey Part 1 page.

PT Survey Part 1		PT Survey Part 2	
Starr,Rhonda C		Employee	
		EmplID: PU019	
		Find View All First 1 of 1 Last	
Reporting Year: 1994			
Gender: Female		Year of Birth: 1958	
☐ Bargaining Agent			
Degree Earned			
Level of Highest Degree:		No Degree/Diploma/Prof.Desgnth	
Year of Highest Degree:		9898	
		Last Load Date: 06/14/2002	
Number of Appointments To Be Reported: 1		Last Date Changed:	
		Last Date Reported:	

PT Survey Part 1 page

Bargaining Agent

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

Number of Appointments To Be Reported

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

Viewing PT Survey Results (Part 2)

Access the PT Survey Part 2 page.

PT Survey Part 1 PT Survey Part 2

Starr,Rhonda C Employee EmplID: PU019

Find | View All First 1 of 1 Last

Reporting Year: 1994

Find | View All First 1 of 1 Last

Employment Rcd Nbr: 0

Work Duration Start Date: 01/01/1995 End Date: 09/30/1995

Appointment Status: Part Time Appointment

Type of Appointment: Non-Tenure on Track

Principal Subject: Guidance and Counselling

Salary Paid: 1384 Stats-Can Teaching Load: 0.08

Full-Time Teaching Equivalent: 0.06

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. Values include:

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

2: Part-time appointment.

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

Type of Appointment

Displays the type of appointment, based on the tenure status on the Tenure Data page and the duties in the Statistics Canada Academic Teaching Employment Table 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 8.8 Human Resources PeopleBook: Administer Workforce, “Hiring Your Workforce,” Entering Optional Employment-Related Data

Creating the Survey Report Flat Files

This section provides common elements and pages used to create the survey report flat files.

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.

Pages Used to Create the Survey Report Flat Files

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

Verifying Survey Results With Statistics Canada

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

Page Used to Verify Survey Results

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

CHAPTER 7

(AUS) Reporting DETYA 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 DETYA reports data.

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

This section discusses how to:

- Maintain classification codes.
- Maintain organizational units.

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

Pages Used to Set Up DETYA Reporting Codes

Page Name	Object Name	Navigation	Usage
Classification Codes	DETYA_CLSN_AUS	- Workforce Development, Faculty Events, Define Faculty Events Data, Classification Codes AUS, Classification Codes - Set Up HRMS, Product Related, Workforce Development, Faculty Events, Classification Codes AUS, Classification Codes	Define classification codes specific to DETYA reporting.
Organization Unit	DETYA_ORGUNIT_AUS	- Workforce Development, Faculty Events, Define Faculty Events Data, Organization Unit AUS, Organization Unit - Set Up HRMS, Product Related, Workforce Development, Faculty Events, Organization Unit 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.
Find | View All
First 1 of 1 Last

Effective Date:
11/05/2002

***Status:**
Active

***Description:**
Academic

Short Description:

***Classification Group Code:**
Level A

Classification Codes page

Classification Group Code

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

Maintaining Organizational Units

Access the Organization Unit page.

Organization Unit

Organizational Unit: 154

Australia Higher Education Organization Unit Codes. Find | View All First 1 of 1 Last

Effective Date:	11/05/2002	*Status:	Active
*Description:	University		
Short Description:	Univ		

Organization Unit page

Effective Date, Description and Short Description Define the information for each organizational unit.

Generating DETYA Reports Data

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

Pages Used to Generate DETYA Reports

Page Name	Object Name	Navigation	Usage
DETYA Data Generation	DETYA_PROCESS	Workforce Development, Faculty Events, Manage DETYA Information AUS, Create DETYA, 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.
DETYA File Creation	DETYA_FILE	Workforce Development, Faculty Events, Manage DETYA Information AUS, Create DETYA File, 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.
DETYA Inquiry	DETYA_PRCs_INQ	Workforce Development, Faculty Events, Manage DETYA Information AUS, Review DETYA, 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 rerun.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports,” Administer Workforce Reports

Glossary of PeopleSoft Terms

absence entitlement	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
absence take	This element defines the conditions that must be met before a payee is entitled to take paid time off.
account	You use an account code to record and summarize financial transactions as expenditures, revenues, assets, or liabilities balances. The use of this delivered PeopleSoft ChartField is typically defined when you implement PeopleSoft General Ledger.
accounting class	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
accounting date	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
accounting entry	A set of related debits and credits. An accounting entry is made up of multiple accounting lines. In most PeopleSoft applications, accounting entries are always balanced (debits equal credits). Accounting entries are created to record accruals, payments, payment cancellations, manual closures, project activities in the general ledger, and so forth, depending on the application.
accounting split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
action reason	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
activity	In PeopleSoft Enterprise Learning Management, an instance of a catalog item delivery method it may also be called a class. The activity defines such things as meeting times and locations, instructors, reserved equipment and materials, and detailed costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure

	from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
application agent	An application agent is an online agent that is loaded into memory with a PeopleSoft page. It detects when a business rule has been triggered and determines the appropriate action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attachment	In PeopleSoft Enterprise Learning Management, nonsystem-defined electronic material that supplements a learning resource, such as an equipment items user handbook or the site map of a large facility.
background process	In PeopleSoft, background processes are executed through process-specific COBOL programs and run outside the Windows environment.
benchmark job	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called system-maintained account.
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business event	In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, Introduction to Microsoft Word. A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods.
category	In PeopleSoft Enterprise Learning Management, a way to classify catalog items so that users can easily browse and search relevant entries in the learning catalog. Categories can be hierarchical.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
child	In PeopleSoft Tree Manager trees, a child is a node or detail on a tree linked to another, higher-level node (referred to as the parent). Child nodes can be rolled up into the parent. A node can be a child and a parent at the same time depending on its location within the tree.
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
clone	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
configuration parameter catalog	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
corporate account	Equivalent to the Account ChartField. Distinguishes between the chart of accounts typically used to record and report financial information for management, stockholders, and the general public, as opposed to a chart of statutory (alternate) accounts required by a regulatory authority for recording and reporting financial information.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.

data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
data row	Contains the entries for each field in a table. To identify each data row uniquely, PeopleSoft applications use a key consisting of one or more fields in the table.
data validation	In PeopleSoft Enterprise Incentive Management, a process of validating and cleansing the feed data to resolve conflicts and make the data processable.
DAT file	This text file, used with the Verity search engine, contains all of the information from documents that are searchable but not returned in the results list.
delivery method	In PeopleSoft Enterprise Learning Management, identifies a learning activity's delivery method type. An activity can have one or more delivery methods.
delivery method type	In PeopleSoft Enterprise Learning Management, specifies a method that your organization uses to deliver learning activities, for example, scheduled or self-paced learning.
distribution	The process of assigning values to ChartFields. A distribution is a string of ChartField values assigned to items, payments, and budget amounts.
double byte character	If you're working with Japanese or other Asian employees, you can enter the employee's name using double-byte characters. The standard double byte character set name format in PeopleSoft applications is: [last name] space [first name].
dynamic tree	A tree that takes its detail values directly from a table in the database, rather than from a range of values entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM job	Abbreviation for <i>Enterprise Incentive Management job</i> . In PeopleSoft Enterprise Incentive Management, a collection of job steps that corresponds to the steps in an organization's compensation-related business process. An EIM job can be stopped to allow manual changes or corrections to be applied between steps, and then resumed from where it left off, continuing with the next step. A run can also be restarted or rolled back.
EIM ledger	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
equipment	In PeopleSoft Enterprise Learning Management, resource items that can be assigned to a training facility, to a specific training room, or directly to an activity session. Equipment items are generally items that are used (sometimes for a fee) and returned after the activity is complete.

event	Events are predefined points either in the application processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program associated with that component and that event. Examples of events are FieldChange, SavePreChange, and OnRouteSubscription. In PeopleSoft Human Resources, <i>event</i> also refers to incidents that affect benefits eligibility.
event propagation process	In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
external system	In PeopleSoft, any system that is not directly compiled with PeopleTools servers.
fact	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
filter	In PeopleSoft applications, a filter creates a subset of information. Filters are used in templates to limit your information from a pick list of attribute values.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
group	Any set of records associated under a single name or variable in order to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
homepage	Users can personalize the homepage, or the page that first appears when they access the portal.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.
incentive rule	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
key	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners within the same learning environment that share the same attributes, such as department or job code.
learning activity	See <i>activity</i> .
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities.
learning plan	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned and in-progress learning activities.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

level	A section of a tree that organizes groups of nodes.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
load	The feature that initiates a process to automatically load information into a PeopleSoft application for example, populating the PeopleSoft Benefits database with plan-level election information.
local functionality	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addresses for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location indicated by a <i>1</i> is the address you use most often and may be different from the main address.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
material	In PeopleSoft Enterprise Learning Management, a resource item that can be assigned to the sessions of an activity. Material items are generally consumed during the duration of an activity and not returned, and they may have an associated cost.
message definition	An object definition specified in PeopleSoft Application Designer that contains message information for PeopleSoft Application Messaging.
meta-SQL	Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
metastring	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	Processes in PeopleSoft applications that can create both application entries and general ledgers denominated in more than one currency.
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
objective	In PeopleSoft Enterprise Learning Management, an individual's learning goal. An example of a learning goal is a competency gap.
override	In PeopleSoft Enterprise Incentive Management, the ability to make a change to a plan that applies to only one plan context.
pagelet	Each block of content on the homepage is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.

parent node	A tree node linked to lower-level nodes or details that roll up into it. A node can be a parent and a child at the same time, depending on its location within the tree.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also <i>participant object</i> .
payout	In PeopleSoft Enterprise Incentive Management, the resulting incentive plan computation that is provided to payroll.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of an RDBMS, an application server, a Web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
per seat cost	In PeopleSoft Enterprise Learning Management, the cost per learner, based on the total activity costs divided by either minimum attendees or maximum attendees. Organizations use this cost to price PeopleSoft Enterprise Learning Management activities.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context. If three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan section	In PeopleSoft Enterprise Incentive Management, a segment of a plan that handles a specific type of event processing.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
portal registry	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that

	defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
private view	A user-defined view that is available only to the user who created it.
process	See <i>Batch Processes</i> .
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as an SQR, a COBOL program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
record definition	A logical grouping of data elements.
record field	A field within a record definition.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
reference data	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to

	automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
results management process	In PeopleSoft Sales Incentive Management, the process during which compensation administrators may review processing results, manually change transactions, process draws, update and review payouts, process approvals, and accumulate and push payments to the EIM ledger.
role user	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
role	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
routing	Connects activities in PeopleSoft Workflow. Routings specify where the information goes and what form it takes email message, electronic form, or worklist entry.
run control	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
run control ID	A unique ID to associate each user with his or her own run control table entries.
run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
self-service application	Self-service refers to PeopleSoft applications that are accessed by end users with a browser.
session	In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise

	Learning Management activity characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
sibling	A tree node at the same level as another node, where both roll up into the same parent. A node can be a sibling, parent, and child all at the same time, depending on its location in the tree.
single signon	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
source transaction	In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
SQR	See <i>Structured Query Report (SQR)</i> .
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
Structured Query Report (SQR)	A type of printed or displayed report generated from data extracted from a PeopleSoft SQL-based relational database. PeopleSoft applications provide a variety of standard SQRs that summarize table information and data. You can use these reports as is, customize them, or create your own.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.

table	The underlying PeopleSoft data format, in which data is stored by columns (fields) and rows (records, or instances).
TableSet sharing	Specifies control table data for each business unit so that redundancy is eliminated.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
template	A template is HTML code associated with a Web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
territory	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction loading process	In PeopleSoft Enterprise Incentive Management, the process during which transactions are loaded into Sales Incentive Management. During loading, the source currency is converted to the business unit currency while retaining the source currency code. At the completion of this stage, the transaction is in the first state.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and picked up by a different section for further processing.
transaction type	In PeopleSoft Enterprise Incentive Management, a way to categorize transactions to identify specific transaction types (for example, shipment, order, opportunity, and so on). Plan sections process only one type of transaction type. Transaction types can be defined based on a company's specific processes model.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
uniform resource locator (URL)	In PeopleSoft, the term URL refers to the entire query string. The following is an example of a URL: <code>http://serverx/InternetClient/InternetClientServlet?ICType=Script&ICScriptProgramName=WEBLIB_BEN_401k.PAGES.FieldFormula.iScript_Home401k</code>
universal navigation header	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to

providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

URL

See *uniform resource locator (URL)*.

user interaction object

In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

variable

In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.

warehouse

A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

worksheet

A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

workflow

The background process that creates a list of administrative actions based on selection criteria and specifies the procedure associated with each action.

worklist

The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

zero-rated VAT

Abbreviation for *zero-rated value-added tax*. A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged.

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