

PeopleSoft®

PeopleSoft 8.8
Human Resources PeopleBook:
Track Flexible Service

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PeopleSoft 8.8
Human Resources PeopleBook:
Track Flexible Service
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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>0</i> , not the letter <i>O</i> . |
| KEY+KEY | Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W. |
| 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) | <p>When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.</p> <p>Ampersands also precede all PeopleCode variables.</p> |
| (ISO) | <p>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.</p> <p>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:</p> <p>(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.</p> |
| 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 Flexible Service 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 either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line.

PeopleSoft Application Fundamentals

The *PeopleSoft Human Resources PeopleBook: Track Flexible Service* 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 HRMS 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: <ul style="list-style-type: none">• How to use the Application Fundamentals book.• How PeopleBooks are structured. |

| Chapters | Description |
|--------------------------|---|
| Getting Started With... | <p>This chapter discusses product implementation guidelines. It explains:</p> <ul style="list-style-type: none"> • The business processes documented within the book. • Integrations between the product and other products. • A high-level documentation 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... | <p>This is an introductory chapter that broadly explains the product and the functionality within the product.</p> |
| Setup and Implementation | <p>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.</p> <p>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.</p> |
| Business Process | <p>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.</p> <p>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.</p> |

| 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 Flexible Service

This chapter provides an overview of PeopleSoft Human Resources Track Flexible Service business processes and discusses:

- PeopleSoft Human Resources Track Flexible Service integrations.
- PeopleSoft Human Resources Track Flexible Service implementation.

PeopleSoft Human Resources Track Flexible Service Business Processes

PeopleSoft Human Resources Track Flexible Service provides the following business processes:

- Track tenure
- Track flexible service

We discuss these business processes in the business process chapters in this PeopleBook.

PeopleSoft Human Resources Track Flexible Service Implementation

The PeopleSoft Human Resources Track Flexible Service table-loading implementation can be divided into two phases: fundamental and core. Set up tables to enable your system to support PeopleSoft Human Resources Track Flexible Service features.

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides and table-loading sequences. *PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, with information about where to find the most current version of each.

This section includes tables that guide you through these phases:

- Setting up PeopleSoft HRMS fundamental tables.
- Setting up core PeopleSoft Human Resources Track Flexible Service tables.

Important! The order in which you set up tables required to implement PeopleSoft Human Resources Track Flexible Service may vary; each individual application isn't necessarily set up in sequence. For example, you may set up HRMS tables, then tables for the PeopleSoft Human Resources Track Flexible Service core application, then several tables specific to the country or industry in which you operate, followed by additional PeopleSoft Human Resources Track Flexible Service 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 documentation 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.

See Also

Setting Up PeopleSoft HRMS Fundamental Tables

PeopleSoft Human Resources Track Flexible Service requires that you set up the fundamental PeopleSoft HRMS tables, which are common to multiple PeopleSoft HRMS applications. Follow these steps to define information in the PeopleSoft HRMS fundamental tables. The information that you define in these tables lays the foundation for the PeopleSoft Human Resources Track Flexible Service 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 Flexible Service Tables

The steps that are discussed in this section suggest the order in which you define information in the core PeopleSoft Human Resources Track Flexible Service tables. The information that you define in the fundamental tables lays the foundation for this setup.

Setting up these core tables prepares the system to support these business processes:

- Track tenure
- Track flexible service
- Review cases

| Step | Reference |
|--|---|
| 1. Set up service parameters. | Chapter 3, "Setting Up PeopleSoft Human Resources Track Flexible Service," page 5 |
| 2. Set up service accrual control tables. | Chapter 3, "Setting Up PeopleSoft Human Resources Track Flexible Service," Understanding Track Flexible Service, page 5 |
| 3. Set flexible service tracking defaults at the job code or position level. | Chapter 3, "Setting Up PeopleSoft Human Resources Track Flexible Service," Setting Flexible Service Defaults, page 6 |

CHAPTER 2

Understanding PeopleSoft Human Resources Track Flexible Service

This chapter discusses:

- PeopleSoft Human Resources Track Flexible Service business processes.
- PeopleSoft Human Resources Track Flexible Service integrations.
- Designing PeopleSoft Human Resources Track Flexible Service.

PeopleSoft Human Resources Track Flexible Service

PeopleSoft Human Resources Track Flexible Service enables you to track service types based on rules that you set up based on your organizational needs. You can define service dates, service types, and calculation rules to associate with each service type.

PeopleSoft Human Resources Track Flexible Service Business Processes

PeopleSoft Human Resources Track Flexible Service uses these business processes:

- Track tenure
- Track flexible service

We discuss these business processes in the business process chapters in this PeopleBook.

PeopleSoft Human Resources Track Flexible Service Integrations

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

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

We discuss integrations in this PeopleBook.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Understanding Enterprise Integration Points in HRMS”

CHAPTER 3

Setting Up PeopleSoft Human Resources Track Flexible Service

This chapter provides an overview of Track Flexible Service in PeopleSoft Human Resources and discusses how to:

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

Understanding Track Flexible Service

PeopleSoft Human Resources Track Flexible Service enables you to track service types based on complex rules that you set up based on your own organizational needs. You define service dates, service types, and calculation rules to associate with each service type.

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

Most organizations have requirements—based on internal procedures and bargaining agreements—that define different types of service and different service calculation rules for different types of eligibility. Other requirements are mandated by local or federal legislation. For example, the Family and Medical Leave Act defines the service date calculation method for compliance with the plan, and the state of Massachusetts includes all periods of service in accrual toward seniority, regardless of breaks. Track Flexible Service provides flexibility in setting up your tracking structure to comply with internal and external regulations. You can establish your own parameters for calculating accrued service, manage as many dates and service types as you need, and notify participants of important service milestones.

Setting Up Service Parameters

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

- Configure the system to use a certain number of days per month or to use the calendar month.
- Define the database alias (EVENT_DT) to define the reference to job history.

- Activate the application trace, which traces the calculation during a calculation run.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Track Faculty Events, “Setting Up Track Faculty Tenure,” Setting Up Service Parameters and Service Accrual Control Tables

Setting Up Service Accrual Control Tables

Methods of calculating and tracking employee service vary among different groups at the same organization and from one organization to the next. In setup tables, you establish the service rules that best fit your organization. These service rules provide the basis for flexible service accrual processing.

You can:

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

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

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

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

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Track Faculty Events, “Setting Up Track Faculty Tenure,” Setting Up Service Parameters and Service Accrual Control Tables

Setting Flexible Service Defaults

The calculation groups that you define provide the service types and processing rules that are associated with either a single employee or groups of employees. Set defaults on the Position Data Table and the Job Code Table to associate a position, a job code, or both with a calculation group. By doing this, you provide a default calculation group for all employees assigned to that position or job code.

This section discusses how to:

- Set up the position data table.
- Set up the job code table.

Setting Up the Position Data Table

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

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

Selecting a service calculation group on the Position Data Table enables you to associate that calculation group with the selected position number.

Select the Calc Group (Flex Service) (calculation group [flexible service]) for which you want accrued service automatically applied on the Position Data - Specific Information page; this provides the default for flexible service tracking to the Position Data Table.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Positions, “Managing Position Data”

Setting Up the Job Code Table

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

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

Set default calculation groups at the job code level on the Job Code Table – Job Code Profile page.

Select the Service Calculation Group for which you want accrued service automatically applied; this provides the default for flexible service tracking to the Job Code Table. This calculation group applies to any employee who is assigned this specific job code.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Setting Up Jobs,” Classifying Jobs

CHAPTER 4

Assigning an Employee to a Calculation Group

This chapter provides an overview of calculation groups and discusses how to:

- Select a calculation group.
- Run the Employee Service Listing Report.
- Enter startup credits and exceptions.
- Review related jobs for flexible service.

Understanding Calculation Groups

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

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

When you assign an employee to a calculation group in PeopleSoft Human Resources: Track Flexible Service:

- Establish the calculation group to which the employee belongs.
- Establish whether the employee has previous startup credits.
- Establish any exceptions that the employee might have based on the calculation group to which the employee belongs.

For example, each service type into which the employee accrues credits may be based on different service accrual start dates.

- Review any related jobs that the employee might have that are eligible for flexible service.

Selecting a Calculation Group

To include an employee in the flexible service accrual process:

1. Select a service calculation group for the employee in Flex Service Calc Group (flexible service calculation group).

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

Defaults for the calculation group come from the following sources:

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

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

See Also

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

PeopleSoft 8.8 Human Resources PeopleBook: Manage Positions, “Setting Up Positions,” Creating Positions

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Setting Up Jobs,” Classifying Jobs

PeopleSoft 8.8 Human Resources PeopleBook: Track Faculty Events, “Setting Up Track Faculty Tenure,” Associating a Calendar, Proration, and Date Method With a Service Definition Name

PeopleSoft 8.8 Human Resources PeopleBook: Track Faculty Events, “Setting Up Track Faculty Tenure,” Defining Service Calculation Groups

Running the Employee Service Listing Report

This section discusses how to run the Employee Service Listing report.

Page Used to Run the Employee Service Listing Report

| Page Name | Object Name | Navigation | Usage |
|--------------|---------------|---|---|
| Service List | RUNCTL_EGPP04 | Workforce Administration, Flexible Service EG, Employee Service Report, Service List | Run the Employee Service Listing report (PER048). The report lists employees by calculation group and service type and within specified time periods. Sort by ascending or descending service time. |

Entering Startup Credits and Exceptions

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

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

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

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

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

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

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

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

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

Note. If you don't enter the start dates for processing the service types, the dates are populated from the Run Control page. If the employee doesn't have any processing exceptions, you don't have to enter the employee's information on the Service Detail page. This section discusses how to enter an employee's startup credits and exceptions.

Page Used to Enter Startup Credits and Exceptions

| Page Name | Object Name | Navigation | Usage |
|----------------|---------------|---|---|
| Service Detail | EG_FLX_SVC_DT | Workforce Administration, Flexible Service EG, Flexible Service, Service Detail | Enter an employee's startup credits and exceptions. |

Entering an Employee's Startup Credits and Exceptions

Access the Service Detail page.

Service Detail

EmpID: PA001 Smith, Maggie

Calc Group: SRVC Continuous Service **Orig Hire:** 01/01/1996 **Per Status:** E Employee

Flexible Service Dates

Find | View All First 1-2 of 2 Last

| *Service Type | Start Date | Service | (Yrs/Months/Days) | Last Proc Dt | Startup Cr | |
|-------------------|------------|----------------|-------------------|--------------|--|-----|
| CONTSRV | 01/01/1995 | 1.000000 | (1 / 0 / 0) | 12/31/1998 | 0.000000 | + - |
| *Change Reason: N | | On: 06/06/2000 | | Notes | <input type="checkbox"/> Override Calc | |
| UNION | 01/01/1995 | 1.000000 | (1 / 0 / 0) | 12/31/1998 | 0.000000 | + - |
| *Change Reason: N | | On: 06/06/2000 | | Notes | <input type="checkbox"/> Override Calc | |

Service Detail page

- Service Type** Select the service type only service types that are valid for the selected calculation group appear.
- Start Date** Enter the date on which you want credits to begin accruing for this service type.
Each service type can have a different start date. However, these dates must fall within the range of dates on the calendar that is used by the calculation group.
- Service** Displays the total accrued service credit amount.
The value that appears here is a result of an Update to History run process; it reflects the actual credit amount.
- (Yrs/Months/Days)**
(years/months/days) Displays the total accrued credits in terms of years, months, and days. The service credits have been converted to service years, months, and days from the accrued credit value.
The values displayed here are a result of the Update to History run process; they reflect an actual length of time.
- Last Proc Dt** (last process date) Displays the date to which the service accrual process has accrued. This is the date that you entered on the run control page.
- Startup Cr** (startup credit) Enter the credit amounts that the employee has previously accrued from another job or organization. This value is included in the service accrual process and is added to the employee's total credits.
The startup credit is based on a yearly unit; enter six months of credit as *0.50*.
- Notes** Click this button to enter supplementary notes that pertain to the service type that you entered for the employee (for example, where the employee earned prior startup credits).

Override Calc (override calculation)

Select to *exclude* the service type from the service accrual process for the employee. Clear to include the service type in the service accrual process for the employee.

Change Reason

Change the start date for the service type, or enter a startup credit, and then record the reason for any changes that you made.

Select one of the following values: *Retroactive Adjustment*, *Other*, and *Error Correction*. You can add values in the translate table.

Reviewing Related Jobs for Flexible Service

This section discusses how to review flexible service credits.

Page Used to Review Related Jobs for Flexible Service

| Page Name | Object Name | Navigation | Usage |
|---|-------------|--|---|
| Related Job for Flex Service (related job for flexible service) | EG_FLX_JOBS | Workforce Administration, Flexible Service EG, View Related Jobs, Related Job for Flex Service | Review jobs and positions that the employee holds that are eligible to accrue flexible service credits. |

Reviewing Flexible Service Credits

Access the Related Job for Flex Service page.

Related Job for Flex Service

ID: PA001 **Smith, Maggie**

Orig Hire: 01/01/1996 **Per Status:** Employee

Jobs Counted for Flexible Service
Find | View All First ◀ 1 of 1 ▶ Last

| Empl Rcd# | Service Calc Group | FTE For Accrual | Department | Job Code | Position |
|-----------|--------------------|-----------------|------------------------------------|------------------------------|----------|
| 0 | SRVC | 1.00 | 95700 Licensing & Certification | 170050 Assistant-Office I | |

Related Job for Flex Service page

The page lists the employee's flexible service tracking status, calculation groups to which an employee belongs for each job and position held, and calculation groups for which an employee accrues flexible service credits.

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

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

Jobs Counted for Flexible Service

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

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

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

CHAPTER 5

Calculating Flexible Service and Viewing Results

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

- Run the flexible service calculation process.
- View flexible service calculation results.
- Run the Service Calculation report.

Understanding Calculating Flexible Service

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

Calculating flexible service is a two-step process:

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

You can calculate service credits for:

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

View the results using the Flexible Service Summary page. Normal Run mode produces the results in a temporary file, which enables you to rerun the process until you are satisfied with the results.

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

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

Update to History mode uses the temporary file that was created in Normal Run mode and applies it to the employee's service history. View the results on the Svc History page (service history page). Once this data is committed to history, the temporary file that was created in Normal Run mode is deleted.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Track Faculty Events, “Setting Up Track Faculty Tenure,” Viewing the Message Log

PeopleSoft 8.8 Human Resources PeopleBook: Track Faculty Events, “Setting Up Track Faculty Tenure,” Viewing Periodic Process Results

Processing Modes

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

Normal Run

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

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

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

Update to History

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

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

Delete_Rebuild History

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

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

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

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

Note. Delete_Rebuild History mode does not reaccrete manual adjustments that were entered on the Svc History page. You must reenter these adjustments after the data is committed to history again. However, the system will recalculate all startup credits.

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

Running the Flexible Service Calculation Process

The service calculation process enables you to process one or all service types within a calculation group. You can process one employee rather than all employees within the calculation group.

Suppose your organization has set up a calculation group called *CLER* (clerical workers). This group includes three service types: *UNION*, *AWARDS5* (five year service award), and *SENIORITY*. When you run the flexible service accrual process for this calculation group, each employee who is assigned to the calculation group—who doesn't have exceptions listed on the Service Detail page—accrues service for all three types, beginning at the from date established on the run control page.

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

This section provides discusses how to:

- Specify time periods and calculation groups.
- Understand the process.

Page Used to Run the Flexible Service Calculation Process

| Page Name | Object Name | Navigation | Usage |
|----------------------|---------------|---|---|
| Service Calc Process | RUNCTL_EGPP02 | Workforce Administration, Flexible Service EG, Calculate Service, Service Calc Process | Specify time periods and calculation groups. |

Specifying Time Periods and Calculation Groups for Processing

Access the Service Calc Process page.

Service Calc Process

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

From Date:

To Date: **Calculation Name:** 123

***Calc Group:**

Calc all Service Types **Service Type:**

EmpID:

Service Date Processing Type

Periodic Processing Mode - EG

Delete old Calc Results
 Delete & Reload History
 Commit to History

Service Calc Process page

- Run** Click this button to calculate time periods and calculation groups.
- From Date and To Date** Enter the time period for the calculation. These dates *must* match a computational period of the calendar that is used by the calculation group that you are processing. The From Date must match a period begin date in the calendar, and the To Date must match a period end date.
- For example, you might want to calculate tenure for an academic year that consists of two computational periods, 01/01/00 to 06/31/00, and 07/01/00 to 12/31/00. Therefore, enter *01/01/00* as the From Date and *12/31/00* as the To Date. The process creates a service history for each computational period.
- Calculation Name** This field is automatically populated from the run control ID that you entered. It is used internally by the batch process.
- Calc all Service Types** (calculate all service types) Select to accrue credits for all service types within the calculation group being processed.
- Service Type** Select the service type for which you want to accrue service credits.
- This field is unavailable if you selected the Calc All Service Types check box.
- Service Date Processing Type**
- Periodic Processing Mode - EG** Select the mode that you want to use:
- Delete & Rebuild History:* This mode deletes the employee's service history and rebuilds it. Use to regenerate service for an individual employee (or all

employees) within a calculation group. When you select this value, the system selects the Delete & Reload History check box.

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

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

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

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler

Understanding the Calculation Process

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

Determine an Employee's Eligibility for a Flexible Service Type

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

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

Run a Service Calculation

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

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

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

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

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

Update Flexible Service Detail and History

The batch program processes employees by selecting their service history for each flexible service type from the temporary service history file. If an employee already has a service detail record, the process adds the total calculated service amount to the Service field and updates the Last Proc Date (last processed date) field to indicate the to date of the accrual process.

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

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

Once the process has updated the employee records, the employee's service details are purged from the temporary service history file.

Viewing Flexible Service Calculation Results

This section discusses how to:

- Review the message log.
- Review Normal Run results.
- View service history information.
- View service detail information.

Pages Used to View Flexible Service Calculation Results

| Page Name | Object Name | Navigation | Usage |
|------------------|-----------------|--|-----------------------------------|
| Flex Calc. Summ. | EG_CLC_FLX_SUM | Workforce Administration, Flexible Service EG, Flexible Service Summary, Flex Calc. Summ | Review normal run results. |
| Svc History | EG_SVC_HIST_FLX | Workforce Administration, Flexible Service EG, Svc History | View service history information. |

Reviewing the Message Log

Review the messages that were produced by the Service Calculation process.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Track Faculty Events, "Setting Up Track Faculty Tenure," Viewing the Message Log

PeopleSoft 8.8 Human Resources PeopleBook: Track Faculty Events, "Setting Up Track Faculty Tenure," Viewing Periodic Process Results

Reviewing Normal Run Results

Access the Flex Calc. Summ. page.

| Flex Calc. Summ. | | | | | |
|--|----------------------------|-------------------------------|------------------------|-----------------|--------------|
| User ID: | PS | | Run Control ID: | lk | |
| Calculation Name: | LK | | From Date: | 01/01/1990 | |
| | | | To Date: | 12/31/1995 | |
| Find View All First 1-2 of 13 Last | | | | | |
| Begin/End Date | Service Amt without Breaks | Service Amt with Breaks | Service Adjustment | Accrued Service | Accum Breaks |
| 12/31/1989 | 5.000000 | 5.000000 | 0.000000 | 5.000000 | 0.000000 |
| 12/31/1989 | Action: (BFW) | Total (#yrs/mths/days) | 5/ 0/ 0 | Breaks: | 0.000000 |
| EmpID: | QHE02 | Flexton,Grace | QCCLER | CONTSRV | |
| 01/01/1990 | 0.500000 | 0.500000 | 0.000000 | 5.500000 | 0.000000 |
| 06/30/1990 | Action: HIR () | Total (#yrs/mths/days) | 5/ 6/ 0 | Breaks: | 0.000000 |
| EmpID: | QHE02 | Flexton,Grace | QCCLER | CONTSRV | |

Flex Calc. Summ. page

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

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

| | |
|---|---|
| Calculation Name | Displays the name of the run control ID. |
| From Date and To Date | Displays the from and to dates that you entered on the run control page. These dates indicate the begin and end dates for this process. |
| Begin/End Date | The begin and end dates for which service credits were accrued. One line appears for each of the calendar period dates that fall within the from and to dates that you specified on the run control page. |
| Service Amt without Breaks (service amount without breaks) | Displays the amount of accrued service without breaks that counts toward flexible service. |
| Service Amt with Breaks (service amount with breaks) | Displays the amount of accrued flexible service with breaks that counts toward flexible service. |
| Service Adjustment | Displays the adjustment amount that you entered on the Svc History page. |
| Accrued Service | Displays the total amount of accrued service. |

Accum Breaks (accumulated breaks) Displays the total amount of breaks in service.

Action Displays the job action code that contributed to the service accrual for the calendar period.

Total (#yrs/mths/days) (total number of years, months, and days) Displays the total years, months, and days of accrued service that was earned.

Breaks Displays the amount of breaks in service.

Viewing Service History Information

Access the Svc History page.

Svc History

EmpID: PA001 Smith, Maggie

Calc Group: SRVC Continuous Service

Service Type: CONTSRV Continuous Service

| Service Information | | | | | Find View All | First ◀ | 1-3 of 4 | ▶ Last |
|---------------------|--|------------------|--------------------------------------|--------------|-----------------|---------|----------|--------|
| Begin Date | Service w/o Breaks | Service Adjusted | Total Service Accrued | Accum Breaks | | | | |
| 07/01/1996 | 0.500000 | 0.000000 | 1.000000 | 0.000000 | + | - | | |
| 12/31/1996 | Action: HIR Reason Code: | | Adj Rsn: <input type="text"/> | Notes | | | | |
| 01/01/1996 | 0.500000 | 0.000000 | 0.500000 | 0.000000 | + | - | | |
| 06/30/1996 | Action: HIR Reason Code: | | Adj Rsn: <input type="text"/> | Notes | | | | |
| 07/01/1995 | 0.000000 | 0.000000 | 0.000000 | 0.000000 | + | - | | |
| 12/31/1995 | Action: XXX Reason Code: | | Adj Rsn: <input type="text"/> | Notes | | | | |

Svc History page

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

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

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

| | |
|--|--|
| Begin Date and End Date | Displays the service history begin and end dates that were calculated for this calendar period. |
| Service w/o Breaks (service without breaks) | View the amount of service that was accrued without service breaks. |
| Service Adjusted | View the amount of service that was adjusted. |
| Total Service Accrued | View the total amount of service that was accrued for the employee. |
| Accum Breaks (accumulated breaks) | View the total amount of breaks in service. |
| Action | View the job action from the employee’s job record, such as <i>LOA</i> (leave of absence), that falls within the calendar period. |
| Reason Code | View the Reason Code that is associated with this job action that counts toward accrued service. Access the HR Action/Category page to define job actions and reasons that count toward service accrual. |
| Adj Rsn (adjustment reason) | View the reason for manual adjustments that were made on this page. |

Viewing Service Detail Information

Access the Svc Detail information page.

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

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

Running the Service Calculation Report

This section discusses how to run the Service Calculation report that shows the results of the Service Calculation process (normal run).

Page Used to Run the Service Calculation Report

| Page Name | Object Name | Navigation | Usage |
|---------------------|---------------|---|--|
| Service Calc Report | RUNCTL_EGPP05 | Workforce Administration, Flexible Service EG, Calculated Service Report, Service Calc Report | Run the Service Calculation report (PER049). This report lists the results of the Normal Run batch process and includes all employees who have a temporary file (resulting from a process in Normal Run mode) that contains details about their accrued service credits. |

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. |

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| 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 dynamically 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. |

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| 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. |

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| 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 | Metastings are special expressions included in SQL string literals. The metastings, 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. |

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| 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 |

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| | 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 |

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| | 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 |

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| | 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. |

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| 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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