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# PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Track Faculty Events

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**April 2005**

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## Preface

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# About This PeopleBook Preface

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

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

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**Note.** PeopleBooks document only page elements, such as fields and check boxes, 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.

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## 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.

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

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft menus, and pages, forms, or windows. 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.

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## PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft applications.

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**Note.** Application fundamentals PeopleBooks are not applicable to the PeopleTools product.

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For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most PeopleSoft product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across one or more product lines. 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 the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

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## Documentation Updates and Printed 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.

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**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.

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### See Also

PeopleSoft Customer Connection, <https://www.peoplesoft.com/corp/en/login.jsp>

### 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 PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

## Telephone

Contact MMA Partners at 877 588 2525.

## Email

Send email to MMA Partners at [peoplebookspress@mmapartner.com](mailto:peoplebookspress@mmapartner.com).

## See Also

PeopleSoft Customer Connection, <https://www.peoplesoft.com/corp/en/login.jsp>

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## Additional Resources

The following resources are located on the PeopleSoft Customer Connection website:

| Resource                                                   | Navigation                                                                                                                                                                                 |
|------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Application maintenance information                        | Updates + Fixes                                                                                                                                                                            |
| Business process diagrams                                  | Support, Documentation, Business Process Maps                                                                                                                                              |
| Interactive Services Repository                            | Interactive Services Repository                                                                                                                                                            |
| Hardware and software requirements                         | Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Hardware and Software Requirements                                                           |
| Installation guides                                        | Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Installation Guides and Notes                                                                |
| Integration information                                    | Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Pre-built Integrations for PeopleSoft Enterprise and PeopleSoft EnterpriseOne Applications |
| Minimum technical requirements (MTRs) (EnterpriseOne only) | Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms                                                                                                                   |
| PeopleBook documentation updates                           | Support, Documentation, Documentation Updates                                                                                                                                              |
| PeopleSoft support policy                                  | Support, Support Policy                                                                                                                                                                    |
| Prerelease notes                                           | Support, Documentation, Documentation Updates, Category, Prerelease Notes                                                                                                                  |
| Product release roadmap                                    | Support, Roadmaps + Schedules                                                                                                                                                              |
| Release notes                                              | Support, Documentation, Documentation Updates, Category, Release Notes                                                                                                                     |

| Resource                    | Navigation                                                                         |
|-----------------------------|------------------------------------------------------------------------------------|
| Release value proposition   | Support, Documentation, Documentation Updates, Category, Release Value Proposition |
| Statement of direction      | Support, Documentation, Documentation Updates, Category, Statement of Direction    |
| Troubleshooting information | Support, Troubleshooting                                                           |
| Upgrade documentation       | Support, Documentation, Upgrade Documentation and Scripts                          |

## Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

### Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

| Typographical Convention or Visual Cue | Description                                                                                                                                                                                                                                                                                                                   |
|----------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Bold</b>                            | Indicates PeopleCode function names, business function names, event names, system 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.<br><br>We also use italics when we refer to words as words or letters as letters, as in the following: Enter 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 the W key.                                                                                                         |
| Monospace font                         | Indicates a PeopleCode program or other code example.                                                                                                                                                                                                                                                                         |

| Typographical Convention or Visual Cue | Description                                                                                                                                                                                |
|----------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| “ ” (quotation marks)                  | Indicate chapter titles in cross-references and words that are used differently from their intended meanings.                                                                              |
| . . . (ellipses)                       | Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.                                                                                       |
| { } (curly braces)                     | Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ( ).                                                                                           |
| [ ] (square brackets)                  | Indicate optional items in PeopleCode syntax.                                                                                                                                              |
| & (ampersand)                          | When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.<br><br>Ampersands also precede all PeopleCode variables. |

## 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.

---

If the note is preceded by *Important!*, the note 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.

---

### Cross-References

PeopleBooks provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See*. Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

## Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: “(FRA) Hiring an Employee”

Example of a region-specific heading: “(Latin America) Setting Up Depreciation”

### Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

### Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

### Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

## Currency Codes

Monetary amounts are identified by the ISO currency code.

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## 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](mailto:doc@peoplesoft.com).

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

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## Common Elements Used in PeopleBooks

|                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>As of Date</b>                  | The last date for which a report or process includes data.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Business Unit</b>               | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Description</b>                 | Enter up to 30 characters of text.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Effective Date</b>              | 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.                                                                                                                                                                                                                                                                                                                                                |
| <b>Once, Always, and Don't Run</b> | <p>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.</p> <p>Select Always to run the request every time the batch process runs.</p> <p>Select Don't Run to ignore the request when the batch process runs.</p>                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Process Monitor</b>             | Click to access the Process List page, where you can view the status of submitted process requests.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Report Manager</b>              | 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).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Request ID</b>                  | An ID that represents a set of selection criteria for a report or process.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Run</b>                         | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>SetID</b>                       | 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. |
| <b>Short Description</b>           | Enter up to 15 characters of text.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>User ID</b>                     | An ID that represents the person who generates a transaction.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |



# PeopleSoft Enterprise Human Resources Track Faculty Events Preface

This preface discusses:

- PeopleSoft products.
- PeopleSoft Enterprise HRMS Application Fundamentals.
- PeopleBook structure.

---

## PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Enterprise Human Resources Track Faculty Events.

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## PeopleSoft Enterprise HRMS Application Fundamentals

Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

### See Also

*PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, “PeopleSoft Enterprise HRMS 8.9 Application Fundamentals Preface”

---

## PeopleBook Structure

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

The PeopleBooks structure conveys a task-based hierarchy of information. Each chapter describes a process that is required to set up or use the application. Chapter sections describe each task in the process. Subsections within a section describe a single step in the process task.

Some PeopleBooks may also be divided into parts. PeopleBook parts can group together similar implementation or business process chapters within an application or group together two or more applications that integrate into one overall business solution. When a book is divided into parts, each part is divided into chapters.

The following table provides the order and descriptions of chapters in a PeopleBook

| Chapters                 | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Preface                  | <p>This is the chapter you're reading now. It explains:</p> <ul style="list-style-type: none"> <li>• How to use the Application Fundamentals book.</li> <li>• How PeopleBooks are structured.</li> <li>• Common elements used in the PeopleBook, if necessary.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                     |
| Getting Started With...  | <p>This chapter discusses product implementation guidelines. It explains:</p> <ul style="list-style-type: none"> <li>• The business processes documented within the book.</li> <li>• Integrations between the product and other products.</li> <li>• 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.</li> </ul>                                                                                                                                                                                                            |
| Navigation               | <p>(Optional) Some PeopleSoft applications provide custom navigation pages that contain groupings of folders that support a specific business process, task, or user role. When an application contains custom navigation pages, this chapter provides basic navigation information for these pages.</p> <p><b>Note.</b> Not all applications have delivered custom navigation pages.</p>                                                                                                                                                                                                                                                                     |
| Understanding...         | <p>(Optional) 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><b>Note.</b> 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> |

| Chapters                    | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|-----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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><b>Note.</b> 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> |
| Appendixes                  | <p>(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.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Delivered Workflow Appendix | <p>(Optional) The delivered workflow appendix describes all of the workflows that are delivered for the application.</p> <p><b>Note.</b> Not all applications have delivered workflows.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Reports Appendix            | <p>(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.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |



# CHAPTER 1

## Getting Started with Track Faculty Events

This chapter provides an overview of Track Faculty Events business process in Human Resources and discusses:

- Track Faculty Events business process overview.
- Track Faculty Events business process implementation.

---

### Track Faculty Events Overview

The PeopleSoft Enterprise Human Resources: Track Faculty Events provides these business processes:

- Track faculty tenure.

Track the tenure eligibility of your faculty using predetermined rules and calendars. Set up service and service accrual parameters, assign employees to tenure, and calculate tenure for employees.

- Track events.

Keep track of a variety of faculty events, such as activities, honors and awards, licenses and certificates, professional and committee memberships, publications, special projects, and teaching responsibilities.

- Manage cases.

Prepare cases and forward them to others for review while maintaining employee confidentiality. Define the purpose of the case, and manage the review process within a case review group by reviewer, reviewer team, process step, dates received and forwarded, recommendations, and final actions.

- Work with the Statistics Canada Academic Teaching Surveys.

Prepare and submit the StatsCan Academic Teaching Survey for your organization, required by Statistics Canada for all Canadian universities and degree-granting institutions.

- Report DETYA (Department of Education, Training, and Youth Affairs) for the Australian Higher Education Sector.

Generate and submit these DETYA required reports: the Full Time and Fractional Staff Report and the Casual Report.

---

## Track Faculty Events Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

### Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation documentation, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in the PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, with information about where to find the most current version of each.

### See Also

*PeopleSoft Setup Manager for PeopleSoft Enterprise HRMS and Campus Solutions 8.9 PeopleBook*

## CHAPTER 2

# Understanding Track Faculty Events

This chapter provides an overview of the Track Faculty Events business process in Human Resources.

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## Track Faculty Events Business Process

Track Faculty Events is a business process in Human Resources that enables you to track tenure, faculty events, and to manage faculty cases and reporting requirements. This section provides an overview of how to:

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

### Tracking Tenure

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

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

### Tracking Events

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

- Activities.
- Administrative posts.
- Education, both school and professional training.
- Honors and awards.
- Licenses and certificates.
- Memberships in professional organizations.
- Presentations.
- Publications.
- Special projects.
- Student advisement.

- Teaching responsibilities.
- Committee membership.

## Managing Cases

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

## (CAN) Submitting Statistics Canada Academic Teaching Surveys

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

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

## (AUS) Reporting DETYA for the Australian Higher Education Sector

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

## CHAPTER 3

# Setting Up Track Faculty Tenure

This chapter provides an overview of service parameters and accrual control tables and discusses how to:

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

---

## Understanding Service Parameters and Accrual Control Tables

This section discusses:

- Tracking accrued service.
- Service rules.

### Common Element Used in This Chapter

|                         |                                                                                                                                                                                             |
|-------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Calculation Name</b> | Displays the name of the calculation process. This is the same as the run control ID.<br><br>See <a href="#">Chapter 3, “Setting Up Track Faculty Tenure,” Calculating Tenure, page 47.</a> |
|-------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

### Understanding Tracking Accrued Service

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

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

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

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

## Understanding Service Rules

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

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

- A hire date is effective the first day of the month of hire.
- A leave of absence doesn't count toward service.  
A leave is considered effective the first day of the month if its start date is before the 15th.
- A return from leave reinstates service accrual and is considered effective the first day of the month of return.

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

You can set up two date-rounding options. One option rounds the effective date of the history to the first of the month; the other rounds the effective date to the first of the month when the date falls before the fifteenth of the month. Apply the two rounding options to the human resources action categories, using the Service Rules (EG\_SERVICE\_ELAPSED) component. Suppose that an employee is hired on August 3, 1997. The employee begins a leave of absence on October 13, 1997 and returns to work on December 1, 1997. This table lists the employee's job history:

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

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Viewing Summary Workforce Information," Viewing a Worker's Job History.

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

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

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

To establish service parameters, you must:

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

## Understanding Date Math Methods

A date that is expressed in terms of years, months, and days (YYYY/MM/DD) is a *raw date*. Raw date subtraction subtracts days from days, months from months, and years from years, for example  $1998/01/01 - 1996/08/01 = 0001/05/00$ , or 1 year, 5 months, and 0 days.

However, consider the subtraction  $1998/11/01 - 1995/12/15$ . You can't subtract 15 (days) from 1; therefore, you must convert one of the months to days. However, when you change the 11 months to 10, how many days do you carry to the day column?

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

In our example, the tenth month (October) is the most recent full month that you can convert to days. October has 31 days, so  $1998/11/01$  becomes  $1998/10/32$ . You still have to convert 1 year to months to complete the subtraction, but you know that there are always 12 months in a year. As a result, you end up with a date of  $1997/22/32$ , and the equation is  $1997/22/32 - 1995/12/15 = 0002/10/17$  or 2 years, 10 months, and 17 days.

If you assume 30 days per month,  $1998/11/01$  becomes  $1998/10/31$ . After you again convert 1 year to 12 months, you end up with  $1997/22/31$ . The equation is  $1997/22/31 - 1995/12/15 = 0002/10/16$  or 2 years, 10 months, and 16 days.

## Setting Decimal to Raw Date Conversion Options

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

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

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

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

## Setting Up Date Round Options

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

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

To create a rounding rule, set up all three parts of the rule: the rounding day, the rounding rule, and the rounding period.

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

## Establishing Duration Options

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

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

- Setting raw date subtraction parameters.

As in our earlier discussion of raw date subtraction, you convert months to days to perform subtractions where the smaller (earlier) date has fewer days than the larger (later) date, for example 1998/11/01 – 1995/12/15.

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

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

- Choosing rounding methods.

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

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

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

---

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

---

- Rounding decimal dates and durations.

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

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

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

---

## Setting Up Service Parameters

To set up service parameters, use the Duration Option (EG\_DURATION\_OPTS), Date Round Option (EG\_DATE\_ROUNDING), Date Conversion Option (EG\_DATE\_CONVERSION), Database Alias (EG\_DB\_ALIAS), and Application Trace (EG\_APPLICATION\_TRACE) components.

This section discusses how to:

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

## Pages Used to Set Up Service Parameters

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

## Selecting a Calculation Method

Access the Calculation Option page.

**Calculation Option** **Conversion Options**

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

**Raw Data Subtraction**

☒ **Raw Date Subtraction**

☐ **Actual Days Per Month** ☒ **Assumed Days Per Month** 30

**Month Round Rule**

☒ **Round Up if Periods >** 12 (in Months)

☐ **Round Up if Periods >** 0

**Else Round Down:**

☐ **None**

**Day Round Rule**

☐ **Round Up if Periods >** 0 (in Days)

☒ **Round Up if Periods >** 15

**Else Round Down:**

☐ **None**

For Service Calculation, use "Raw Date Subtraction"

Calculation Option page

### Raw Date Subtraction

This option is selected by default.

### Actual Days Per Month

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

### Assumed Days Per Month

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

**Note.** Select Assumed Days Per Month to avoid possible rounding issues.

## Month Round Rules

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

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

### Round Up if Periods > Else Round Down

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

### None

Select to avoid rounding.

## Day Round Rules

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

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

### Round Up if Periods > Else Round Down

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

### None

Select to avoid rounding.

## See Also

[Chapter 3, "Setting Up Track Faculty Tenure," Understanding Service Rules, page 6](#)

[Chapter 3, "Setting Up Track Faculty Tenure," Selecting a Conversion Method, page 12](#)

## Selecting a Conversion Method

Access the Conversion Options page.

**Calculation Option** **Conversion Options**

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

**Decimal Conversion Assumptions**

\*Days Per Month: 30 Number of Decimal Places: 2

\*Days Per Year: 300.00

**Decimal Conversion Method**

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

**Month Conversion Rules** **Year Conversion Rules**

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

Conversion Options page

### Decimal Conversion Assumptions

#### Days Per Month

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

#### Days Per Year

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

#### Number of Decimal Places

Specify a number of places to round decimals for all points in the conversion process.

---

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

---

### Decimal Conversion Method

The system supports one decimal conversion formula:

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

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

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

## Month Conversion Rules

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

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

## Year Conversion Rules

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

## Setting Up Date Rounding Rules

Access the Date Round Option page.

**Date Round Option**

**Date Rounding Definition Name:** ACAD10      **\*Description:** 1st day of comp. period

**Date Type**

☒ **Raw Date**      **User Code**

**Rounding Day**

☒ **First Day of Period** (Rounding Period)      ☐ **Last Day of Period**

**Rounding Period**

☐ **Calendar Month**      ☐ **Calendar Year** (as defined in the calendar)

**Rounding Rule**

☒ **Coincident or Next**      ☐ **Next**

☐ **Coincident or Previous**      ☐ **Previous**

☐ **Up if Day/Month =>** Threshold  No.:      ☐ **Up if Day/Month =>**  **Else Down**

☐ **Near**      (Note: Rule based on selected Rounding Period)

Date Round Option page

## Date Type

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

## Rounding Day

Select whether to round to the first day of the period or the last day of the period.

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

However, if you round to the first day of a period, you can round to the next, the coincident (with) or next, the previous, the coincident (with) or previous, or the near (nearest) rounding day.

## Rounding Period

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

## Rounding Rule

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

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

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

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

Select a rounding rule from the following options:

Coincident or Next

Next

Coincident or Previous

Previous

Up if Day/Month =>

Up if Day/Month => Else Down

Near

---

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

---

## See Also

Chapter 3, “Setting Up Track Faculty Tenure,” Defining the Human Resources Service Categories, page 27

## Setting Up a Date Conversion Method

Access the Date Conversion page.

**Date Conversion**

**Definition Name:** ACAD **Description:** Academic 10 month

**Option Type**

☒ Decimal Conversion

**Assumptions**

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

**Conversion Method**

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

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

Date Conversion page

---

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

---

## Option Type

Decimal Conversion is the default.

## Assumptions

### Days Per Month

Enter the number of days per month that you want the system to assume when performing conversions.

- Days Per Year

Enter the number of days per year that you want the system to assume when performing conversions.
- Decimal Places

Enter the number of decimal places that you want the system to use in the final decimal figure.

Conversion Method

Select one of the two formula methods:

- $$Yrs + (Months - 1 * (Days / Mth) + Days - 1) / (Days / Yr)$$
- $$Yrs + (Months - 1) / 12 + (Days - 1) / (Days / Yr)$$

See Also

Chapter 3, “Setting Up Track Faculty Tenure,” Understanding Service Rules, page 6

Setting Up a Database Alias

Access the Database Alias page.

Database Alias

Database Alias Name:

EMPL\_TYPE

\*Description:

Employee Type

☒ PeopleSoft Table

Record (Table) Name:

JOB

Field Name:

EMPL\_TYPE

Table Key:

ED

Employee ID & Effective Date

Database Alias page

- Database Alias Name

Enter a field value to create a database alias for referencing the Effective Date field on the Job Table.
- PeopleSoft Table

Select this check box to create the table in PeopleSoft format.
- Record (Table) Name

Enter the PeopleSoft record that contains the field you want to use.
- Field Name

Enter the field name (must be a field present on the Record Name)
- Table Key

Enter the code for the table key.

Turning On the Application Trace

Access the Application Trace page.

Application Trace

☒ **Produce Application Trace**  
☒ **Trace Tenure Service Calc**  
☒ **Trace Flexible Service Calc**

Application Trace page

Setting the application trace is useful during the implementation phase of the tenure and flexible service calculation process. Don't turn on the trace if you run the calculation on a regular basis. The application trace writes to the Service Audit table (EG\_AUDIT\_TRACE) and stores the internal calculation details during a calculation run.

**Produce Application Trace**      Select to turn on the application trace.

**Trace Tenure Service Calc** (trace tenure service calculations)      Select to trace tenure service calculations.

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

---

## Setting Up Service Accrual Control Tables

To set up the service accrual control tables, use the Calendar (EG\_FLEX\_CALENDAR), Action/Category (EG\_ACTION\_CATEGORY), Service Rules (EG\_SERVICE\_ELAPSED), and Calculation Group (EG\_CALC\_GROUPS) components.

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

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

## Understanding Service Accrual Tables

Methods of calculating and tracking employee service and tenure vary among different groups at the same organization and from one organization to the next. Flexible Service AG and Faculty Events provide set up tables where you establish the service rules that best fit your organization. These service rules provide the basis for the flexible service and tenure accrual processing.

You can define your service calendars, establish human resource action and categories to categorize the job action and reason codes that count toward service accrual, and define your date rounding options.

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

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

To set up service accrual control tables, you must:

1. Establish service calendars.
2. Define human resources actions and categories.
3. Associate a calendar, proration, and date method with a service definition name.
4. Define the human resources service categories.
5. Define time adjustments.
6. Define human resources status history adjustments.
7. Set up final adjustments to the service amount.
8. Define adjustments that limit the number of hours or service units that can be accrued.
9. Define service calculation groups.

## Pages Used to Set Up Service Accrual Control Tables

| Page Name | Object Name      | Navigation                                                                                                                                                       | Usage                                                   |
|-----------|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------|
| Calendar  | EG_FLXSVC_CALNDR | Set Up HRMS, Product Related, Workforce Development, Faculty Events, Calendar<br><br>Workforce Development, Faculty Events, Define Faculty Events Data, Calendar | Establish service calendars for accruing service years. |

| Page Name                             | Object Name       | Navigation                                                                                                                                                                                                                                                                                                                                                     | Usage                                                                                                                                                                                                                                   |
|---------------------------------------|-------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| HR Action/Category - HR Action/Reason | EG_HR_CATEGORY    | <p>Set Up HRMS, Product Related, Workforce Development, Faculty Events, HR Action/Category, HR Action/Reason</p> <p>Workforce Development, Faculty Events, Define Faculty Events Data, HR Action/Category, HR Action/Reason</p>                                                                                                                                | Group similar actions and reasons that count toward service and tenure accrual.                                                                                                                                                         |
| Service Definition                    | EG_SVC_DEFINITION | <p>Set Up HRMS, Product Related, Workforce Development, Faculty Events, Service Rules, Service Definition</p> <p>Workforce Administration, Flexible Service EG, Define Service Rules, Service Definition</p> <p>Workforce Development, Faculty Events, Define Faculty Events Data, Service Rules, Service Definition</p>                                       | Associate a calendar, a proration method, and a date method (for rounding) with the service definition name.                                                                                                                            |
| Service Include Category              | EG_SVC_STATUS     | <p>Set Up HRMS, Product Related, Workforce Development, Faculty Events, Service Rules, Service Include Category</p> <p>Workforce Administration, Flexible Service EG, Define Service Rules, Service Definition, Service Include Category</p> <p>Workforce Development, Faculty Events, Define Faculty Events Data, Service Rules, Service Include Category</p> | <p>Define the human resources service categories included in the service accrual process in the selected definition name.</p> <p>Specify the date-rounding options for each human resources category that is included on this page.</p> |

| Page Name                                                  | Object Name        | Navigation                                                                                                                                                                                                                                                                                                                                                        | Usage                                                                                                                                                                                                                |
|------------------------------------------------------------|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Service Add Periods Rules                                  | EG_SVC_ADD_PERIODS | <p>Set Up HRMS, Product Related, Workforce Development, Faculty Events, Service Rules, Service Add Periods Rules</p> <p>Workforce Administration, Flexible Service EG, Define Service Rules, Service Definition, Service Add Periods Rules</p> <p>Workforce Development, Faculty Events, Define Faculty Events Data, Service Rules, Service Add Periods Rules</p> | <p>Define the adjustments where the effective date of a status change moves forward.</p> <p>Select the employee records that are affected by the parameters that you set throughout the Service Rules component.</p> |
| Service Adj Future (service rules - service adjust future) | EG_SVC_ADJ         | <p>Set Up HRMS, Product Related, Workforce Development, Faculty Events, Service Rules, Service Adj Future</p> <p>Workforce Administration, Flexible Service EG, Define Service Rules, Service Adj Future</p> <p>Workforce Development, Faculty Events, Define Faculty Events Data, Service Rules, Service Adj Future</p>                                          | <p>Define human resource status history adjustments that depend on future changes in status.</p>                                                                                                                     |
| Service Final Handling                                     | EG_SVC_FINAL_RND   | <p>Set Up HRMS, Product Related, Workforce Development, Faculty Events, Service Rules, Service Final Handling</p> <p>Workforce Administration, Flexible Service EG, Define Service Rules, Service Final Handling</p> <p>Workforce Development, Faculty Events, Define Faculty Events Data, Service Rules, Service Final Handling</p>                              | <p>Set up final adjustments to the service amount.</p>                                                                                                                                                               |

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

## Establishing a Service Calendar

Access the Calendar page.

Calendar

Calendar: 1

Computational Period

☐ Year
☒ Semester
☐ Term
☐ Quarter
☐ Month

\*Descr: Academic 10

\*Year Type: Acad - 10

\*Months in a Year: 10

\*Periods in a Year: 2

Description: Semester Calendar

Service Information

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

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

Calendar page

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

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

- An academic year of 10 months (August 1 to May 31).

The year has 2 periods; each period spans 5 months. Service is accrued based on each 5-month period.

- A fiscal year of 12 months (July 1 to June 30).

The year has 1 period spanning the full 12 months. A fiscal year calendar might be used to accrue service credits for seniority.

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

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

## Computational Period

|                                         |                                                                                                                                                                                                                                                                                                                                                                 |
|-----------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Year, Semester, Term, or Quarter</b> | Select a time frame to accrue flexible service or tenure.                                                                                                                                                                                                                                                                                                       |
| <b>Year Type</b>                        | <p>Select a year type on which to base calculations. Then specify the number of months and periods in a year for this year type, for example, an academic year of 10 months divided into 4 periods (quarters).</p> <p>Your system is delivered with year types <i>Acad-10</i> and <i>Fiscal-12</i>. You can make additional entries on the translate table.</p> |
| <b>Months in a Year</b>                 | Enter the number of months in the calendar year that you are defining.                                                                                                                                                                                                                                                                                          |
| <b>Periods in a Year</b>                | Enter the number of periods in the calendar year.                                                                                                                                                                                                                                                                                                               |
| <b>Year</b>                             | Enter the calendar year that is covered by the defined calendar. For example, if the academic year 2002 comprises two semesters, one starting in September 2001 and the other in January 2002, enter 2002 in this column for both semester rows.                                                                                                                |
| <b>Prd. (period)</b>                    | Enter the period for the defined calendar year. Enter the calendar period numbers in sequence; for example, 1 through 4, if you selected <i>Acad-10</i> divided into 4 periods.                                                                                                                                                                                 |
| <b>Begin Date and End Date</b>          | Enter the period's start and end dates.                                                                                                                                                                                                                                                                                                                         |
| <b>Period Name</b>                      | Enter the period name.                                                                                                                                                                                                                                                                                                                                          |
| <b>Abbrev (abbreviation)</b>            | Enter an abbreviated name for the period.                                                                                                                                                                                                                                                                                                                       |
| <b>Prds Count (periods count)</b>       | Using a decimal value of up to two decimal places, enter how much the period counts toward the entire year (for example, for four periods, each period can count as 0.25 of the total year). Use this value to calculate how much credit an employee receives for working the period.                                                                           |

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

## Defining Human Resources Actions and Categories

Access the HR Action/Reason page.

HR Action/Reason page

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

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

See [Chapter 3, "Setting Up Track Faculty Tenure," Defining the Human Resources Service Categories, page 27.](#)

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

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

|                      |                                                                                                                                                                                                                                                                                                                                              |
|----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Category Name</b> | Displays the service category name that you entered on the page. If you are adding a new category, enter a new category name that describes the type of job actions and reasons to which the category applies on the HR Action/Reason page. Examples of category names are CAT_LOA (category leave of absence) and CAT_HIRE (category hire). |
| <b>Action</b>        | Select the job action that should accrue toward service in this human resources category. To include more than one action for this category, click the Insert Row button to add rows.                                                                                                                                                        |
| <b>Reason</b>        | Select a reason to include reason codes for a job action and make it eligible to accrue service credits.<br><br>You can specify more than one reason for an action by adding a row and selecting the same action and a different reason.                                                                                                     |
| <b>All Reasons</b>   | Select to specify that all reason codes for a job action are eligible to accrue service credits. You don't need to add a row for each reason.                                                                                                                                                                                                |

### See Also

Chapter 3, "Setting Up Track Faculty Tenure," Associating a Calendar, Proration, and Date Method with a Service Definition Name, page 24

## Associating a Calendar, Proration, and Date Method with a Service Definition Name

Access the Service Definition page.

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

Service Definition page

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

**Definition Name** Displays the name that you selected. Enter a new definition name for this set of service rules in the Add-Service Rules search page.

**Service Type** Displays the method used to calculate accrued service. By default, the system uses *Elps Time* (elapsed time). This method measures the time duration between two dates, taking into account the human resources action and category event changes on the employee's job history.

See [Chapter 3, "Setting Up Track Faculty Tenure," Defining the Human Resources Service Categories, page 27.](#)

## Tenure Clock/Service Calendar

**Calendar ID** Enter the calendar ID to use for this definition name. Calendars are maintained on the Calendar page. For example, you might link the definition name, FACULTY, to a service calendar that is based on the academic year using the computational period of a semester (10 months in a year and 2 periods in a year).

See [Chapter 3, "Setting Up Track Faculty Tenure," Establishing a Service Calendar, page 21.](#)

|                               |                                                                                                                                                                                                                                                                                                                                                                                                    |
|-------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Months in a Year</b>       | <p>Displays the number of months per year for the selected calendar, as defined on the Calendar page and based on the Calendar ID field.</p> <p>See <a href="#">Chapter 3, “Setting Up Track Faculty Tenure,” Establishing a Service Calendar, page 21.</a></p>                                                                                                                                    |
| <b>Computational Period</b>   | <p>Displays the period of time during which the service calculation is based. This is based on the Calendar ID field, for example, <i>S</i> (semester). This field is populated by the selected calendar, which is maintained on the Calendar page.</p> <p>See <a href="#">Chapter 3, “Setting Up Track Faculty Tenure,” Establishing a Service Calendar, page 21.</a></p>                         |
| <b>Periods in a Year</b>      | <p>Displays the number of periods per year for the selected calendar and is based on the Calendar ID field.</p>                                                                                                                                                                                                                                                                                    |
| <b>Prorate Method</b>         |                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Prorate By</b>             | <p>Select a prorate method of <i>None</i> or <i>FTE</i> (full-time equivalency), depending on the type of service being tracked.</p>                                                                                                                                                                                                                                                               |
| <b>Pro-rate if below</b>      | <p>Enter the percentage of FTE (for example, <i>80</i>) below which you want the system to prorate accrued service. The system calculates any FTE value that is equal to or greater than this value as 1.0, for the purpose of proration. This field isn't visible if you selected <i>None</i> in the Prorate By field. The system calculates all FTE values as 1.0.</p>                           |
| <b>Elapsed Time Method</b>    |                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Duration Option</b>        | <p>Enter a duration from the list of options. You can set up different ways to calculate elapsed time using the Duration Option pages.</p> <p>See <a href="#">Chapter 3, “Setting Up Track Faculty Tenure,” Setting Up Service Parameters, page 9.</a></p>                                                                                                                                         |
| <b>Date Method</b>            |                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Date Round Option</b>      | <p>Enter a date rounding method to be used in calculating service dates. You set date rounding options on the Date Round Option page.</p> <p>See <a href="#">Chapter 3, “Setting Up Track Faculty Tenure,” Setting Up Date Rounding Rules, page 13.</a></p>                                                                                                                                        |
| <b>Date Conversion Option</b> | <p>Enter a date conversion method, such as <i>ACAD</i>, from the list of options. Date conversion methods are established and maintained on the Date Conversion Options page. This field applies only to the flexible service tracking. It doesn't apply to tenure tracking.</p> <p>See <a href="#">Chapter 3, “Setting Up Track Faculty Tenure,” Setting Up Date Rounding Rules, page 13.</a></p> |

## See Also

[Chapter 3, “Setting Up Track Faculty Tenure,” Setting Up a Date Conversion Method, page 15](#)

## Defining the Human Resources Service Categories

Access the Service Include Category page.

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

Definition Name: FACULTY Description: Faculty Tenure

**HR Status Adjustment Order**

Future Status: 3 Date Round: 1 Add Time to Date: 2

| Include/Add                         | *Category Type       | *Category Name                   | Date Round Option                          |
|-------------------------------------|----------------------|----------------------------------|--------------------------------------------|
| <input checked="" type="checkbox"/> | Hire Category        | CAT_HIRE<br>Hire Categories      | TOPRVMTH<br>Round to current if < 15 days  |
| <input type="checkbox"/>            | Other                | CAT_LOA<br>Leave of Absence      | TONXTMTH<br>Round to 1st of Following Mont |
| <input checked="" type="checkbox"/> | Other                | CAT_PLA<br>Paid Leave of Absence | TONXTMTH<br>Round to 1st of Following Mont |
| <input type="checkbox"/>            | Termination Category | CAT_TERM<br>Termination          | TONXTMTH<br>Round to 1st of Following Mont |

Service Include Category page

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

See [Chapter 3, "Setting Up Track Faculty Tenure," Defining Human Resources Actions and Categories, page 23](#).

### HR Status Adjustment Order (human resources status adjustment order)

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

- |                         |                                                                                                                                                                                                      |
|-------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Future Status</b>    | Refers to the status entered on the Service Adj Future page.<br><br>See <a href="#">Chapter 3, "Setting Up Track Faculty Tenure," Defining Human Resources Status History Adjustments, page 30</a> . |
| <b>Date Round</b>       | Refers to the date round options set on this page.                                                                                                                                                   |
| <b>Add Time to Date</b> | Refers to the adjustment entered on the Service Add Periods Rules page.<br><br>See <a href="#">Chapter 3, "Setting Up Track Faculty Tenure," Defining Time Adjustments, page 28</a> .                |

## Tenure/Service Categories

|                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Include/Add</b>       | Select to have the service category in the Category Name field count toward service accrual. For example, select this check box if you want a leave of absence to count toward service accrual.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Category Type</b>     | Select a category type such as <i>Hire Category</i> , <i>Other</i> , or <i>Termination Category</i> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Category Name</b>     | <p>Enter a human resources category name, such as <i>CAT_LOA</i> (category leave of absence). A human resources category comprises one or more job action and reason codes. You establish human resources categories and their component human resources' action and category groups on the HR Action/Category page.</p> <p>See <a href="#">Chapter 3, "Setting Up Track Faculty Tenure," Defining Human Resources Actions and Categories, page 23</a>.</p> <p>For example, if you select the category <i>CAT_HIRE</i> (category hire), which you set up to include the action codes <i>HIRE</i> (hire) and <i>REH</i> (rehire), select the Include/Add check box to make both of these job action codes eligible for accrual within the definition name.</p> |
| <b>Date Round Option</b> | <p>Enter the option that is to be used for each human resources category. For example, you might round all hire and rehire dates to the first of the month. Thus, credit is accrued based on the first of the month, regardless of the date in the month that the employee was hired. These options are maintained on the Date Round Option page.</p> <p>See <a href="#">Chapter 3, "Setting Up Track Faculty Tenure," Setting Up Date Rounding Rules, page 13</a>.</p>                                                                                                                                                                                                                                                                                       |

## Defining Time Adjustments

Access the Service Add Periods Rules page.

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

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

Find | View All      First 1-2 of 4 Last

|                                                        |          |                     |     |
|--------------------------------------------------------|----------|---------------------|-----|
| <b>Category Name:</b>                                  | CAT_HIRE | Hire Categories     | + - |
| <b>Record Impacted:</b>                                | None     |                     |     |
| <b>Adjustment Rule</b>                                 |          |                     |     |
| <input checked="" type="radio"/> <b>Periods to Add</b> | Number:  | Unit of the Period: |     |
|                                                        |          |                     |     |
| <b>Category Name:</b>                                  | CAT_LOA  | Leave of Absence    | + - |
| <b>Record Impacted:</b>                                | None     |                     |     |
| <b>Adjustment Rule</b>                                 |          |                     |     |
| <input checked="" type="radio"/> <b>Periods to Add</b> | Number:  | Unit of the Period: |     |

Service Add Periods Rules page

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

### Category Name

The category name refers to the human resources service category, such as CAT\_HIRE (category hire) that is specified on the Service Include Category page. To set up adjustment rules for more than one category name, add new rows. If you entered more than one category name, click the insert row button to add information for each category.

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

### Record Impacted

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

### Adjustment Rule

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

### Periods to Add

Select to add time to an effective date.

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

|                           |                                                                                                                                                                                                                      |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Number</b>             | Enter the number of periods to add to the accrued service.                                                                                                                                                           |
| <b>Unit of the Period</b> | Select the unit for the periods that you are adding. For instance, if you select <i>Days</i> in this field and enter 2 in the Number field, the system adds two days to the effective date of the selected category. |

## Defining Human Resources Status History Adjustments

Access the Service Adj Future page.

Service Adj Future page

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

### Adding Time to the Effective Date of a Status Change

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

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

### Ignoring the Current Status Change

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

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

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

This adjustment has the following effect:

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

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

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

## Service Information

|                                                                      |                                                                                                                                                                                                                                                                                                                                                  |
|----------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Service Adjustment Type</b>                                       | <p>Select from the list of values. Options are:</p> <ul style="list-style-type: none"> <li>• <i>Add</i></li> <li>• <i>Ignore Cur</i> (ignore current)</li> <li>• <i>Ignore Fut</i> (ignore future)</li> <li>• <i>Insert</i></li> </ul> <p>Some of the fields that appear below this field vary, depending on the value that you select here.</p> |
| <b>Service Adjustment Action Cd</b> (service adjustment action code) | Enter the type of service adjustment action, such as <i>HIRE</i> (hire).                                                                                                                                                                                                                                                                         |
| <b>Adjust. Reason</b> (adjustment reason)                            | Enter the reason for the adjustment, such as <i>LTDP</i> (long term disability with pay).                                                                                                                                                                                                                                                        |
| <b>Occurs Within</b>                                                 | The system displays this when you select <i>Add</i> , <i>Ignore Cur</i> , or <i>Ignore Fut</i> in the Service Adjustment Type field.                                                                                                                                                                                                             |
| <b>Does Not Occur Within</b>                                         | The system displays this when you select <i>Insert</i> in the Service Adjustment Type field.                                                                                                                                                                                                                                                     |
| <b>AdjWin Num (adjustment window number)</b>                         | Enter a number to use in conjunction with the Type field.                                                                                                                                                                                                                                                                                        |
| <b>Type</b>                                                          | Select <i>Days</i> , <i>Months</i> , <i>User Code</i> , <i>Weeks</i> , or <i>Years</i> .                                                                                                                                                                                                                                                         |
| <b>Add</b>                                                           | Enter a time period to add to the service adjustment. This field appears when you select <i>Add</i> in the Service Adjustment Type field.                                                                                                                                                                                                        |
| <b>Ignore Future</b>                                                 | Select the type of service adjustment action that is to be ignored in the future. This field appears when you select <i>Ignore Fut</i> in the Service Adjustment Type field.                                                                                                                                                                     |

|                                        |                                                                                                                                                                                                |
|----------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Adj Act 2 (adjustment action 2)</b> | Select a service adjustment action that is define in the human resources category. This field appears when you select <i>Insert</i> or <i>Ignore Fut</i> in the Service Adjustment Type field. |
| <b>Reason</b>                          | Select the reason code that is defined in the human resources category. This field appears when you select <i>Insert</i> or <i>Ignore Fut</i> in the Service Adjustment Type field.            |
| <b>Insert</b>                          | Select the type of service adjustment action that is to be inserted. This field appears when you select <i>Insert</i> in the Service Adjustment Type field.                                    |

## Setting Up a Final Adjustment to the Service Amount

Access the Service Final Handling page.

Service Final Handling page

Service Final Handling page

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

### Final Result Conversion

**Final Service Result Units** Select the calendar unit, such as *Years*, that is to be used in the final conversion. *Y* is the only value that is available for track flexible service and track faculty events.

### Final Result Adjustment

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

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

## Final Service Limit

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

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

## Defining Adjustments That Limit Accrual of Hours or Service Units

Access the Min/Max Service Rules page.

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

Definition Name: FACULTY      Description: Faculty Tenure

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

| Category | Description           | Limit                                                                                             | Service              |
|----------|-----------------------|---------------------------------------------------------------------------------------------------|----------------------|
| CAT_HIRE | Hire Categories       | <input type="radio"/> Minimum <input type="radio"/> Maximum <input checked="" type="radio"/> None | <input type="text"/> |
| CAT_LOA  | Leave of Absence      | <input type="radio"/> Minimum <input type="radio"/> Maximum <input checked="" type="radio"/> None | <input type="text"/> |
| CAT_PLA  | Paid Leave of Absence | <input type="radio"/> Minimum <input type="radio"/> Maximum <input checked="" type="radio"/> None | <input type="text"/> |
| CAT_TERM | Termination           | <input type="radio"/> Minimum <input type="radio"/> Maximum <input checked="" type="radio"/> None | <input type="text"/> |

Min/Max Service Rules page

These rules apply to a human resources action and category that is based on a calendar period.

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

**Category** Displays the service category, such as *CAT\_HIRE* (category hire), which is defined on the Service Include Category page.

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

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

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

|                |                                                                                                                                                 |
|----------------|-------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Limit</b>   | Select Minimum or Maximum to specify a minimum or maximum service limit for each category that is listed. Select None for no limit.             |
| <b>Service</b> | Enter the minimum or maximum amount of service for the selected category. This field is required if you selected Minimum or Maximum as a limit. |

## Defining Service Calculation Groups

Access the Calculation Group page.

**Calculation Group**

**Service Calculation Group:** FAC **\*Function Indic.:** Tenure

**Description:** Faculty Tenure Calc. Group **Use Start-Up:** Y

**Short Description:** Faculty

**Service Type:** FACTENURE **Description:** Tenure Service ☒ **Service Type Active**

**\*Effective Date:** 01/01/1900 **Start Date:** 01/01/1900 **Stop Date:** **Or Alias:** EVENT\_DT

**\*Definition Name:** FACULTY Faculty Tenure

Calculation Group page

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

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

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Track Flexible Service*, “Calculating Flexible Service and Viewing Results,” Viewing Service History Information.

Service credit accrues against each service type. The service types are linked to a definition name that stipulates which service or calculation rules are applied during the service accrual process. Each service type has its own set of service or calculation rules based on how you set them up. The definition name provides a connection between the service rules (calendar, human resource categories, and date rounding options) and the service type.

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

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

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

|                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|---------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Service Calculation Group</b>            | Displays the name that you entered for this calculation group in the Add (if you are creating a new calculation group) or search page. A calculation group name can be up to six characters.                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Function Indic.</b> (function indicator) | Select the function, or process, for which this calculation group will be used. Values are <i>Flex Srv</i> (flexible service) and <i>Tenure</i> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Use Start-Up</b>                         | Enter <i>Y</i> (yes) to include start-up credits to the employee's accrued service. Start-up credit is maintained on the Service Detail page for the employee.<br><br>Enter <i>N</i> (no) exclude prior service credits in the calculations.                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Service Type</b>                         | Enter the service type to assign to this calculation group. To assign additional service types, press F7 or click the Insert Row button to add rows.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Service Type Active</b>                  | Select to activate a service type for the current calculation group.<br><br>If you clear the check box for a service type, that service type isn't included in the service accrual process.                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Start Date</b>                           | Enter a valid calendar date as the start date for this calculation group. The start date determines when the change is added to the system. Use a valid calendar date, not an alias, as the start date.                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Stop Date</b>                            | Enter a stop date in this field or select an alias in the Alias field. You must do one or the other.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Or Alias</b>                             | If you did not enter a stop date in the Stop Date field, enter an alias in this field.<br><br>Or Alias is a critical field. Enter the alias, <i>EVENT_DT</i> (event date), which links to the job history in the calculation process. The <i>EVENT_DT</i> alias is maintained on the Database Alias page. In the case of a service calculation, the through date is used as the event date.                                                                                                                                                                                                                                                |
| <b>Definition Name</b>                      | Once you enter a service type for this calculation group, you must indicate the service rules definition name that the service type is to use. This is where your calendar links. The definition name (maintained on the Service Rules component) dictates the calendar that is used. The definition name provides the following information to the system: <ul style="list-style-type: none"> <li>• Which calendar to use.</li> <li>• Which date rounding and proration methods to use.</li> <li>• What service categories (action and category code groupings) are eligible for inclusion in the service calculation process.</li> </ul> |

## See Also

Chapter 3, "Setting Up Track Faculty Tenure," Setting Up a Database Alias, page 16

## Setting Up Tenure Tracking

To set up tenure tracking, use the Academic Rank (EG\_RANK\_TBL) and the Experience/Credit Codes (EG\_EXP\_DEFINITION) components.

This section discusses how to:

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

### Pages Used to Set Up Tenure Tracking

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

### Establishing Academic Ranks

Access the Academic Rank page.

**Academic Rank**

Academic Rank: 001

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

\*Effective Date: 01/01/1990  
 \*Description: Professor  
 Short Description: Prof  
 \*Status: Active  
 Rank-IPEDS: Professor

☒ Eligible for Tenure Tracking

**Tenure Tracking Eligibility**

Service Calculation Group: FAC  
 Probationary Period (# of yrs): 6.0  
☐ Partial Credit Allowed  
☐ Carry Automatic Tenure

Academic Rank page

## Academic Rank Information

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

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

**Eligible for Tenure Tracking**

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

## Tenure Tracking Eligibility

**Service Calculation Group**

Enter the calculation group for this academic rank. For example, enter *FAC* (faculty) to include the associate professor rank in the faculty calculation group.

**Partial Credit Allowed**

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

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

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

**Carry Automatic Tenure**

Select if tenure automatically applies to this rank. This does not affect the tenure calculation process.

## Setting Up Experience and Credit Codes

Access the Exp/Credit Codes page.

**Exp/Credit Codes**

**Experience or Credit Code:** PUNV

| Experience or Credit Code Information                             |                             | Find   View All | First 1 of 1 Last |
|-------------------------------------------------------------------|-----------------------------|-----------------|-------------------|
| *Effective Date:                                                  | 01/01/1950                  | *Status:        | Active            |
| *Description:                                                     | Prior University Experience |                 |                   |
| Short Description:                                                | Prior Univ                  |                 |                   |
| <input checked="" type="checkbox"/> <b>Add to Tenure Services</b> |                             |                 |                   |

Exp/Credit Codes page

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

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

## Assigning an Employee to Tenure

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

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

## Understanding Employee Tenure

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

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

### Departments Capable of Granting Tenure

On the Comm. Acctg. and EG (commitment accounting and education and government) page, select the Can Grant Tenure check box to indicate that the department can grant or award tenure. The system automatically activates the Grant Tenure field on the Tenure Data page for employees assigned to tenure granting departments.

## Pages Used to Assign an Employee to Tenure

| Page Name                | Object Name    | Navigation                                                                                            | Usage                                                                                                                                                                                 |
|--------------------------|----------------|-------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Tenure Data              | EG_EMPL_TENURE | Workforce Development, Faculty Events, Calculate Tenure, Create Tenure Data, Tenure Data              | Maintain tenure tracking data for employees. Default information is automatically populated from the Job Data component.                                                              |
| Prior Experience/Credits | EG_PRIOR_EXP   | Workforce Development, Faculty Events, Calculate Tenure, Create Tenure Data, Prior Experience/Credits | Track an employee's service accrued from other institutions that counts toward your organization's tenure service clock. Maintain experience and credit types on the Exp/Credit page. |
| Change History           | EG_TENURE_CHG  | Workforce Development, Faculty Events, Calculate Tenure, Review Rank/Status History, Change History   | View changes made to academic rank and tenure status associated with a home department. The system automatically tracks changes. This page is display-only.                           |
| Related Jobs             | EG_JOB_VW      | Workforce Development, Faculty Events, Calculate Tenure, Review Related Jobs, Related Jobs            | Review current jobs that count toward an employee's tenure. This page is display-only.                                                                                                |

## Activating Tenure Accrual

To activate tenure tracking for an employee:

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

---

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

---



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

---

## Defining Tenure Data

Access the Tenure Data page.

| Tenure Data                                                                                                                                                                                                                                                                                                                                                                          |                 | Prior Experience/Credits |            | Service History                        |                 |                |             |       |      |                  |               |                |     |         |                 |   |     |           |          |            |  |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|--------------------------|------------|----------------------------------------|-----------------|----------------|-------------|-------|------|------------------|---------------|----------------|-----|---------|-----------------|---|-----|-----------|----------|------------|--|
| Gerard Miller                                                                                                                                                                                                                                                                                                                                                                        |                 |                          | ID: K0G013 |                                        |                 |                |             |       |      |                  |               |                |     |         |                 |   |     |           |          |            |  |
| *Tenure Status:                                                                                                                                                                                                                                                                                                                                                                      | Tenure          | Home Rank:               | 004        | Lecturer                               |                 |                |             |       |      |                  |               |                |     |         |                 |   |     |           |          |            |  |
| Track Start Date:                                                                                                                                                                                                                                                                                                                                                                    | 06/23/2004      | Change Date:             | 06/23/2004 | Change Reason: Retro Adj               |                 |                |             |       |      |                  |               |                |     |         |                 |   |     |           |          |            |  |
| Original Track Date:                                                                                                                                                                                                                                                                                                                                                                 | 07/01/2000      | *Tenure Home:            | 13000      | Finance                                | Grant Tenure: N |                |             |       |      |                  |               |                |     |         |                 |   |     |           |          |            |  |
| Service Calc. Group:                                                                                                                                                                                                                                                                                                                                                                 | FAC             | Mandatory Review Dt:     |            | Granted Date:                          |                 |                |             |       |      |                  |               |                |     |         |                 |   |     |           |          |            |  |
| <input type="checkbox"/> Override Calculation                                                                                                                                                                                                                                                                                                                                        |                 | Committed FTE:           |            | <a href="#">Notes</a>                  |                 |                |             |       |      |                  |               |                |     |         |                 |   |     |           |          |            |  |
| <b>Probation (Number of Years)</b>                                                                                                                                                                                                                                                                                                                                                   |                 |                          |            |                                        |                 |                |             |       |      |                  |               |                |     |         |                 |   |     |           |          |            |  |
| Total Required:                                                                                                                                                                                                                                                                                                                                                                      | 0.000000        | Time Accrued:            | 0.000000   | Current As Of Date:                    |                 |                |             |       |      |                  |               |                |     |         |                 |   |     |           |          |            |  |
| Extended By:                                                                                                                                                                                                                                                                                                                                                                         | 0.000000        | Time To Accrue:          | 0.000000   | <input type="checkbox"/> Terminal Year |                 |                |             |       |      |                  |               |                |     |         |                 |   |     |           |          |            |  |
| <b>Other Tenure Departments List</b>                                                                                                                                                                                                                                                                                                                                                 |                 |                          |            |                                        |                 |                |             |       |      |                  |               |                |     |         |                 |   |     |           |          |            |  |
| <table border="1"> <thead> <tr> <th>Department</th> <th>Description</th> <th>Grant</th> <th>Rank</th> <th>Rank Description</th> <th>Tenure Status</th> <th>Effective Date</th> <th>FTE</th> </tr> </thead> <tbody> <tr> <td>1 10000</td> <td>Human Resources</td> <td>N</td> <td>001</td> <td>Professor</td> <td>On Track</td> <td>08/01/2004</td> <td></td> </tr> </tbody> </table> |                 |                          |            |                                        |                 | Department     | Description | Grant | Rank | Rank Description | Tenure Status | Effective Date | FTE | 1 10000 | Human Resources | N | 001 | Professor | On Track | 08/01/2004 |  |
| Department                                                                                                                                                                                                                                                                                                                                                                           | Description     | Grant                    | Rank       | Rank Description                       | Tenure Status   | Effective Date | FTE         |       |      |                  |               |                |     |         |                 |   |     |           |          |            |  |
| 1 10000                                                                                                                                                                                                                                                                                                                                                                              | Human Resources | N                        | 001        | Professor                              | On Track        | 08/01/2004     |             |       |      |                  |               |                |     |         |                 |   |     |           |          |            |  |

Tenure Data page

**Tenure Status**

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

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

**Home Rank**

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

**Track Start Date**

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

The track start date must correspond to the begin date of the calendar associated with the calculation group to ensure that the tenure calculation process runs correctly. For example, if an employee's track start date is 09/01/2000, then the calendar begin date must be 09/01/2000. For this reason, you might define calendars only to accommodate track start dates.

**Change Date and Change Reason**

Display the date the rank or status change is effective and the reason for the change. The default date is the track start date. If the Change Reason field does not display a default, select one of the options in the Tenure Status field.

**Original Track Date**

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

**Tenure Home**

Displays the department granting the employee's tenure. This value is automatically populated from the employee's current job record.

**Grant Tenure**

The system automatically activates this display-only field for employees assigned to tenure granting departments shown in the Tenure Home field. The Y (yes) or N (no) data indicates if the home department can grant tenure.

|                                                                                                             |                                                                                                                                                                                                                                                                     |
|-------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Service Calc. Group</b><br>(service calculation group)                                                   | Select the group used to calculate tenure accrual.                                                                                                                                                                                                                  |
| <b>Mandatory Review Dt</b><br>(mandatory review date)                                                       | Enter the employee's mandatory review date.                                                                                                                                                                                                                         |
| <b>Granted Date</b>                                                                                         | Enter the date that tenure was granted.                                                                                                                                                                                                                             |
| <b>Override Calculation</b>                                                                                 | Select to not include this employee in the tenure calculation process.                                                                                                                                                                                              |
| <b>Committed FTE</b> (committed full-time equivalent)                                                       | Enter the percentage of time the employee is a committed FTE. This enables you to track the tenure FTE committed for budgetary reasons. The Tenure FTE field on the Employment Data - Employment Information page determines the proration for the accrual process. |
| <hr/> <b>Note.</b> The tenure calculation process does not use other tenure departments' information. <hr/> |                                                                                                                                                                                                                                                                     |
| <b>Notes</b>                                                                                                | Click to enter notes regarding the employee's tenure.                                                                                                                                                                                                               |

### Probation (Number of Years)

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

### Other Tenure Departments

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

|                      |                                                                                                                                     |
|----------------------|-------------------------------------------------------------------------------------------------------------------------------------|
| <b>Department</b>    | Enter other departments in which the employee is accruing tenure. For example, an employee might hold positions in two departments. |
| <b>Rank</b>          | Enter the rank that the employee holds in that department. Maintain ranks in the Academic Rank table.                               |
| <b>Tenure Status</b> | Enter the employee's tenure status for the position.                                                                                |

**Effect Date** Enter the date the tenure status is effective.

**FTE (full-time equivalent)** Enter the percentage of time the employee is a committed FTE.

## See Also

*PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, “Setting Up Organization Foundation Tables,” Enabling and Controlling Department Information for Specified Customers

## Defining Prior Experience and Credits

Access the Prior Experience/Credits page.

The screenshot displays the 'Prior Experience/Credits' page for Gerard Miller (Person ID: K0G013). The page includes tabs for 'Tenure Data', 'Prior Experience/Credits', and 'Service History'. Key fields shown are 'Original Start Date' (05/01/1998) and 'Highest Education Level' (A-Not Indicated). A 'Summary Totals' section shows 'Total Time Required', 'Total Time Accrued', 'Prior', and 'Time To Accrue' all as 0.000000. Below this is a table of prior experience credits with columns for Exp / Credit, Description, From Date, To Date, Credit Granted, Add to Tenure, Rank, Rank Description, and Notes. Three entries are listed: Prior University Experience (PUNV), Prior Research Experience (PRSH), and another Prior Research Experience (PRSH).

| Summary Totals       |  |                     |  |          |  |                 |  |  |  |
|----------------------|--|---------------------|--|----------|--|-----------------|--|--|--|
| Total Time Required: |  | Total Time Accrued: |  | Prior:   |  | Time To Accrue: |  |  |  |
| 0.000000             |  | 0.000000            |  | 0.000000 |  |                 |  |  |  |

| Prior Experience/Credit |                             |            |            |                |                                     |      |                  |       |     |
|-------------------------|-----------------------------|------------|------------|----------------|-------------------------------------|------|------------------|-------|-----|
| *Exp / Credit           | Description                 | *From Date | To Date    | Credit Granted | Add to Tenure                       | Rank | Rank Description | Notes |     |
| 1 PUNV                  | Prior University Experience | 04/12/2001 |            |                | <input checked="" type="checkbox"/> |      |                  | Notes | + - |
| 2 PRSH                  | Prior Research Experience   | 11/14/2000 | 03/05/2001 |                | <input checked="" type="checkbox"/> |      |                  | Notes | + - |
| 3 PRSH                  | Prior Research Experience   | 07/12/1999 | 09/25/2000 |                | <input checked="" type="checkbox"/> |      |                  | Notes | + - |

Prior Experience/Credits page

**Original Start Date** Displays the employee's hire date.

**Highest Education Level** Displays the employee's highest level of education.

## Summary Totals

**Total Time Required** Displays the total number of service years required to receive tenure. This value is automatically populated from the Total Required field on the Tenure Data page.

**Total Time Accrued** Displays the total number of service years accrued toward tenure. This value is automatically populated from the Time Accrued field on the Tenure Data page. The number changes if you make an online adjustment to the service history.

**Prior** Displays the total number of years from prior employment that count toward tenure service (calculated to two decimal places).

**Time To Accrue** Displays the number of years remaining to accrue tenure status. This value is automatically populated from the Time To Accrue field on the Tenure Data page. The number of years remaining to accrue tenure status changes if you make an online adjustment to the service history.

## Prior Experience/Credit

|                                            |                                                                                           |
|--------------------------------------------|-------------------------------------------------------------------------------------------|
| <b>Exp / Credit</b><br>(experience/credit) | Select the employee's previous experience or credit type, such as <i>RSHR</i> (research). |
| <b>From Date and To Date</b>               | Enter the beginning and ending dates of the experience or credit.                         |
| <b>Credit Granted</b>                      | Enter the amount of credit granted for the prior experience.                              |
| <b>Add to Tenure</b>                       | Select this check box to add these credits to tenure accrual.                             |
| <b>Rank</b>                                | Select the rank at which the credits were granted, such as <i>005</i> (professor).        |
| <b>Notes</b>                               | Click to enter comments regarding prior experience.                                       |

## Viewing the Change History

Access the Change History page.

Change History

Employee:

Niles,William

PU018

Tenure Home:

90310

Tenure Status:

NTK On Track

Calc Group:

FAC

Track Start Dt:

02/01/1995

Override Calc:

Tenure Granted Date:

Home Department Rank/Status Change History

Find | View All First 1 of 1 Last

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

Change History page

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

**Tenure Granted Date** Displays the date tenure was granted if the employee received tenure status.

## Home Department Rank/Status Change History

**Academic Rank** Displays the employee's academic rank at the time of the rank or status change.

**Tenure Status** Displays the employee's tenure status at the time of the rank or status change.

**Action Date** Displays the date the rank or status change takes place.

**Change Reason** Displays the reason for the rank or status change.

## Viewing Related Jobs

Access the Related Jobs page.

Related Jobs

**Employee:** Niles,William PU018

**Tenure Home:** 90310 Electrical Engineering **Tenure Status:** NTK On Track

**Track Start Dt:** 02/01/1995 **Calc Group:** FAC **Override Calc:** **Tenure Granted Dt:**

| Jobs Counted for Tenure Accrual |                 |                                 |                     |          | Find   View All | First | 1 of 1 | Last |
|---------------------------------|-----------------|---------------------------------|---------------------|----------|-----------------|-------|--------|------|
| Empl Rcd#                       | FTE For Accrual | Current Department              | Job Code            | Position |                 |       |        |      |
| 0                               | 0.50            | 90310<br>Electrical Engineering | 720000<br>Professor | PUU6027  |                 |       |        |      |

Related Jobs page

**Employee** Displays the employee's name and ID.

**Tenure Home** Displays the code for the department in which the employee received, or will receive, tenure.

**Tenure Status** Displays the employee's tenure status.

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

**Calc Group** (calculation group) Displays the calculation group used to calculate this employee's tenure, such as *FAC*.

|                                                |                                                                                                |
|------------------------------------------------|------------------------------------------------------------------------------------------------|
| <b>Override Calc</b> (override calculation)    | This check box is selected only if the Override Calc check box is selected on the Tenure page. |
| <b>Tenure Granted Dt</b> (tenure granted date) | Displays the date the employee received tenure status.                                         |

### Jobs Counted for Tenure Accrual

|                                           |                                                                                                                                                                                                      |
|-------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Empl Rcd#</b> (employee record number) | Maintain this number in the Job Data component.                                                                                                                                                      |
| <b>FTE For Accrual</b>                    | Displays the employee's FTE value, such as .80 for an employee working 80 percent of a normal full-time schedule. Maintain the FTE for accrual on the Employment Data - Employment Information page. |
| <b>Job Code</b>                           | Maintain job code IDs on the Job Code component.                                                                                                                                                     |
| <b>Position</b>                           | Displays the employee's position number and a description of the position.                                                                                                                           |

---

## Running the Tenure Calculation Process

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

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

## Understanding the Tenure Calculation Process

Tenure calculation is a two-step process:

1. Calculate tenure service in Normal Run mode for a specific time period, such as a semester or quarter.  
Calculate tenure service for a calculation group or an individual employee. View the results on the Periodic Process page; these results are temporary until you run the calculation process in Update to History mode.  
Also view messages about the processing on the Message Log page. This enables you to ensure that tenure calculation processes are running correctly before you commit them to history by using Update to History mode.
2. Use Update to History mode to make the results of the Normal Run mode permanent.  
Running the calculation process in Update to History mode updates the tenure service totals on the employee tenure data record and adds new service details to the employee service history. View the results on the Tenure Data - Service History page.

---

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

---

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

## How the System Calculates Tenure Service

To calculate tenure service, the system:

- Determines an employee's eligibility by checking the tenure status on the tenure data record.  
The calculation process processes employees with the Non Tenure On Track status only.
- Calculates service based on the from date and to date, which constitute the computational period specified on the Batch Tenure Calc page.

---

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

---

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

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

See [Chapter 3, "Setting Up Track Faculty Tenure," Setting Up Service Accrual Control Tables, page 17.](#)

- Performs any prorating by FTE on the calculated service before writing the service details to a temporary service history file.

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

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

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

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

## How the System Updates Tenure and Service History

To update tenure service and service history, the system:

- Processes employees by selecting their service details from the temporary service history file.
- Updates employee tenure data records:
  - Adds the total calculated tenure amount to the Time Accrued field.
  - Subtracts the amount from the Time to Accrue field to show the remaining time the employee needs to accrue to reach the amount in the Total Required field.
  - Updates the Current As Of field to show the to date of the calculation period.
- Updates the employee service history with the new tenure accrual details from the temporary file.
- Purges the tenure accrual details from the temporary service history file.

## See Also

[Chapter 3, “Setting Up Track Faculty Tenure,” Setting Up Service Parameters, page 9](#)

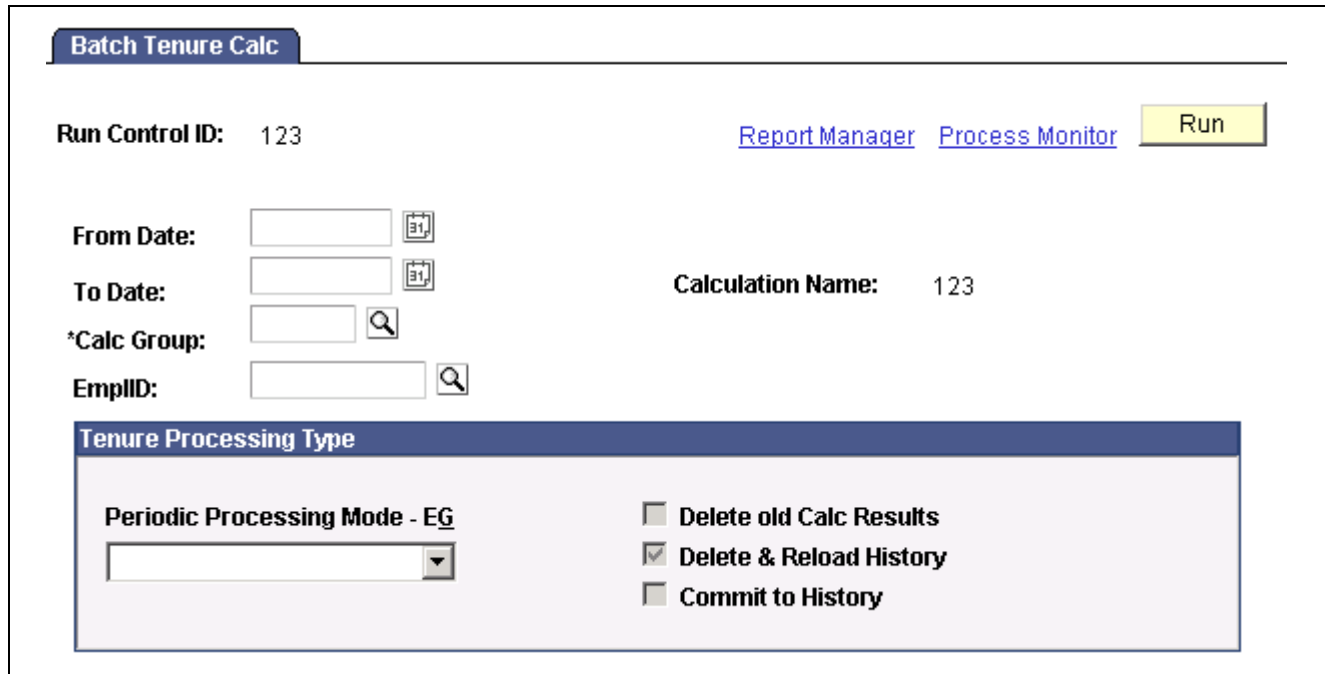
[Chapter 3, “Setting Up Track Faculty Tenure,” Setting Up Service Accrual Control Tables, page 17](#)

## Pages Used to Run the Tenure Calculation Process

| Page Name                                          | Object Name    | Navigation                                                                                                                                                                                         | Usage                                                                                                                                                                                                                                                                     |
|----------------------------------------------------|----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Batch Tenure Calc , (batch tenure calculation)     | RUNCTL_EGPP01  | Workforce Development, Faculty Events, Calculate Tenure, Perform Tenure Calculations, Batch Tenure Calc                                                                                            | Calculate tenure. Run tenure calculation processes and update tenure service history. Before using this page, set up the Calculation Group page.                                                                                                                          |
| Message Log                                        | EG_MESSAGE_LOG | Workforce Administration, Flexible Service EG, Message Log, Message Log<br><br>Workforce Development, Faculty Events, Calculate Tenure, Review Processing Messages, Message Log                    | View dated and timed information about calculation processes. Track errors in processes and searches for error messages associated with a particular run.                                                                                                                 |
| Periodic Process                                   | EG_PRDIC_RSLTS | Workforce Administration, Flexible Service EG, View Periodic Results, Periodic Process<br><br>Workforce Development, Faculty Events, Calculate Tenure, Review Tenure Run Results, Periodic Process | View the results of the tenure calculation process, such as the employee’s tenure status, what was processed, and whether the run was successful or not.<br><br>This information is temporary and changes when you run the calculation process in Update to History mode. |
| Tenure Calc Summary , (tenure calculation summary) | EG_CLC_SVC_SUM | Workforce Development, Faculty Events, Calculate Tenure, Review Tenure Calc Summary, Tenure Calc Summary                                                                                           | View the tenure calculation summary for the calculation process run in Normal Run or Delete_Rebuild History mode. When you run the calculation process in Update to History mode, you can no longer view this page.                                                       |
| Service History                                    | EG_SVC_HIST    | Workforce Development, Faculty Events, Calculate Tenure, Create Tenure Data, Service History                                                                                                       | View the service history for employees and enter service adjustments and codes. Maintain adjustment action and reason codes on the HR Action/Category page.                                                                                                               |

## Calculating Tenure

Access the Batch Tenure Calc page.



Batch Tenure Calc page

**From Date and To Date**

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

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

**Calc Group** (calculation group)

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

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

**EmplID** (employee ID)

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

**Periodic Processing Mode - EG**

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

*Delete & Rebuild History:* Select to regenerate tenure service for an individual employee (or all employees) within a tenure calculation group. None of the adjustments that you entered on the Tenure Data - Service History page re-accrue. You must re-enter the adjustments. All start-up credits are recalculated.

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

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

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

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

*Update to History:* Select to update the Tenure Data - Service History page. The results from using normal run become the input data for this value. When you select this value, the system selects the Commit to History check box.

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

## Viewing the Message Log

Access the Message Log page.

Message Log

View Messages

\*Search Criteria

Instance

Process Instance

To Instance

Job ID

Search

☐ Show Program Names

Find | View 100

First 1-4 of 123 Last

| Instance | Job ID     | DateTime             | Program                                    |
|----------|------------|----------------------|--------------------------------------------|
| 1        | APP ENGINE | 10/06/2004 1:02:49PM | Updating VERSION of PS_ARCH_PR OJ (0,0)    |
| 1        | APP ENGINE | 10/06/2004 1:02:49PM | Updating VERSION of PS_PRCSD EFN (0,0)     |
| 1        | APP ENGINE | 10/06/2004 1:02:49PM | Updating VERSION of PS_PRC SJOB DEFN (0,0) |
| 1        | APP ENGINE | 10/06/2004 1:02:49PM | Updating VERSION of PS_PRC SREC UR (0,0)   |

Message Log page

### Search Criteria

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

**Process Instance and To Instance**

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

**Job ID**

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

**Show Program Names**

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

**Search**

Click to display the error messages.

**Date Time**

Displays the date and time the program ran.

**Program Name**

Displays the program message in the text box if you selected the Retain Program Names check box.



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

## Viewing Periodic Process Results

Access the Periodic Process page.

Periodic Process

Run Control ID: Faculty

Run Date: 06/05/2000

Process Instance: 541

Run Status: Complete with no Errors

To Date: 12/31/1998

Periodic Cycle:

Process Mode: Normal Run

Service Calculation Group: FAC

Name:

Calculate All Groups: N

Delete & Reload History: N

Delete old Calc Results: Y

Commit to History: N

Find | View All

First 1 of 1 Last

Calc Group: FAC

Service Type: FACTENURE

Employees Processed: 7

Employees with Errors: 7

Employees with Errors

Find | View All

First 1-3 of 7 Last

|       |               |
|-------|---------------|
| PJ015 | Wysocki,Wendy |
| PJ016 | Honda,Dennise |
| PJ018 | Niko,Noreen   |

Periodic Process page

**Run Date**

Displays the date that the calculation process ran.

**Process Instance**

Displays the calculation process instance number.

**Run Status**

Displays basic information about the calculation process, including whether the system encountered problems.

**To Date**

Displays the end date of the period covered in this calculation process.

|                                                                                    |                                                                                                                                                       |
|------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Periodic Cycle</b>                                                              | Displays the periodic cycle for this run control ID.                                                                                                  |
| <b>Process Mode</b>                                                                | Displays the period processing mode from the Batch Tenure Calc page (for track faculty events) or the Service Calc page (for track flexible service). |
| <b>Service Calculation Group</b>                                                   | Displays the calculation group included in this calculation process run.                                                                              |
| <b>Name</b>                                                                        | Displays the employee's ID number if you are running the calculation process for an individual employee.                                              |
| <b>Calculate All Groups</b>                                                        | Displays <i>N</i> (no).                                                                                                                               |
| <b>Delete &amp; Reload History, Delete old Calc Results, and Commit to History</b> | Displays <i>Y</i> (yes) or <i>N</i> (no), depending on the period processing mode that you selected.                                                  |
| <b>Service Type</b>                                                                | Displays the service type included in the calculation process.                                                                                        |
| <b>Employees Processed</b>                                                         | Displays the number of employees processed during this calculation.                                                                                   |
| <b>Employees with Errors</b>                                                       | Displays the number of employee records the system designated as erroneous during the calculation process.                                            |

## Viewing the Tenure Calculation Summary

Access the Tenure Calc Summary page.

Tenure Calc Summary

|                   |        |                 |            |
|-------------------|--------|-----------------|------------|
| User ID:          | PS     | Run Control ID: | TENURE     |
| Calculation Name: | TENURE | From Date:      | 01/01/1992 |
|                   |        | To Date:        | 05/31/1998 |

| Find   View All First 3-4 of 5 Last |                            |                         |                    |                 |              |
|-------------------------------------|----------------------------|-------------------------|--------------------|-----------------|--------------|
| Begin/End Date                      | Service Amt without Breaks | Service Amt with Breaks | Service Adjustment | Accrued Service | Accum Breaks |
| 01/01/1997                          | 0.500000                   | 0.500000                | 0.000000           | 1.500000        | 0.000000     |
| 05/31/1997                          |                            | Action: HIR ( )         |                    | Breaks:         | 0.000000     |
| EmplID:                             | QGE18                      | Judy Tenson             |                    |                 |              |
| 08/01/1997                          | 0.500000                   | 0.500000                | 0.000000           | 2.000000        | 0.000000     |
| 12/31/1997                          |                            | Action: HIR ( )         |                    | Breaks:         | 0.000000     |
| EmplID:                             | QGE18                      | Judy Tenson             |                    |                 |              |

Tenure Calc Summary page

|                              |                                                                       |
|------------------------------|-----------------------------------------------------------------------|
| <b>From Date and To Date</b> | Displays the dates between which the tenure calculation process ran.  |
| <b>Begin/End Date</b>        | Displays the beginning and ending dates for this calculation process. |

|                                                                                                                                                                                                                                                                            |                                                                                               |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
| <b>Service Amt without Breaks</b> (service amount without breaks)                                                                                                                                                                                                          | Displays the amount of service without breaks that counts toward tenure.                      |
| <b>Service Amt with Breaks</b> (service amount with breaks)                                                                                                                                                                                                                | Displays the amount of service with breaks that counts toward tenure.                         |
| <b>Accrued Service</b>                                                                                                                                                                                                                                                     | Displays the total amount of accrued service time.                                            |
| <b>Accum Breaks</b> (accumulated breaks)                                                                                                                                                                                                                                   | Displays the total amount of accumulated breaks in service.                                   |
| <b>Note.</b> If the employee has existing service history, the total service amount comes forward in an entry with an action of <i>BFW</i> . Begin and end dates for the entry show the date prior to the from date of the period specified on the Batch Tenure Calc page. |                                                                                               |
| <b>Action</b>                                                                                                                                                                                                                                                              | Displays the job action code that contributed to the service accrual for the calendar period. |
| <b>Breaks</b>                                                                                                                                                                                                                                                              | Displays the amount of breaks in service.                                                     |
| <b>EmplID</b>                                                                                                                                                                                                                                                              | Displays the ID of the employee whose service information was processed.                      |

## Viewing the Service History

Access the Service History page.

Tenure Data

Prior Experience/Credits

Service History

Gerard Miller
ID: K0G013

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

Detail Information

Find | View All First 1 of 1 Last

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

Action: Reason Code: Adjustment Reason: Recalc
Notes

Service History page

|                            |                                                                                |
|----------------------------|--------------------------------------------------------------------------------|
| <b>Total Time Required</b> | Displays the total number of service years required from the Tenure Data page. |
|----------------------------|--------------------------------------------------------------------------------|

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



# CHAPTER 4

## Tracking Events

This chapter discusses how to:

- Track faculty events
- Track committee information.

---

### Tracking Faculty Events

This section discusses how to:

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

### Common Elements Used in This Section

|                          |                                                                                                                                                                                         |
|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Average Grade</b>     | Enter an average grade, using letters or numbers. For example, 3.8.                                                                                                                     |
| <b>School Code</b>       | Select a school code. When you press the tab key, the system automatically displays the school name, state, and country. If no code exists, enter the school name in the related field. |
|                          | Maintain school codes in the School Table.                                                                                                                                              |
| <b>Country and State</b> | Enter the school country and state if the system does not automatically display them.                                                                                                   |

If you select a different country code after you have already selected a state code, the system clears the value in the State field.

## Pages Used to Track Faculty Events

| Page Name                                                           | Object Name        | Navigation                                                                                                                                                                                                                                     | Usage                                                                                                                                                                              |
|---------------------------------------------------------------------|--------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Activities                                                          | EG_ACTIVITIES      | Workforce Development, Faculty Events, Track Events, Activities, Activities                                                                                                                                                                    | Track employees' research activities by type of academic activity, date, sponsor, and organization.                                                                                |
| Administrative Post Table                                           | EG_ADMIN_POST_TBL  | Set Up HRMS, Product Related, Workforce Development, Faculty Events, Administrative Posts, Administrative Post Table<br><br>Workforce Development, Faculty Events, Define Faculty Events Data, Administrative Posts, Administrative Post Table | Set up administrative posts.                                                                                                                                                       |
| Administrative Posts                                                | EG_ADMIN_POSTS     | Workforce Development, Faculty Events, Track Events, Administrative Posts, Administrative Posts                                                                                                                                                | Track administrative posts and appointments and titles that you do not want to track in the Job Data component. Before using this page, set up the Administrative Post Table page. |
| School Education                                                    | EG_SCHOOL_EDUCAT   | Workforce Development, Faculty Events, Track Events, Education, School Education                                                                                                                                                               | Track educational background. Use this information to determine employee abilities for career and tenure planning.                                                                 |
| Professional Ed. and Training (professional education and training) | EG_EDUCAT_TRAIN_GB | Workforce Development, Faculty Events, Track Events, Education, Professional Ed. and Training                                                                                                                                                  | Track professional education and training.                                                                                                                                         |
| Honors & Awards                                                     | EG_HONORS_AWARDS   | Workforce Development, Faculty Events, Track Events, Honors and Awards, Honors & Awards                                                                                                                                                        | Track honors and awards received by employees.                                                                                                                                     |
| Licenses and Certifications                                         | EG_LICENSE_CERTIFS | Workforce Development, Faculty Events, Track Events, Licenses and Certificates, Licenses and Certifications                                                                                                                                    | Track licenses and certifications held by employees.                                                                                                                               |

| Page Name                    | Object Name        | Navigation                                                                                                      | Usage                                                       |
|------------------------------|--------------------|-----------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------|
| Memberships                  | EG_MEMBERSHIPS     | Workforce Development, Faculty Events, Track Events, Memberships, Memberships                                   | Track memberships that employees have.                      |
| Presentations                | EG_PRESENTATIONS   | Workforce Development, Faculty Events, Track Events, Presentations, Presentations                               | Track information about presentations given by employees.   |
| Publications                 | EG_PUBLICATIONS    | Workforce Development, Faculty Events, Track Events, Publications, Publications                                 | Track information about the employees' published works.     |
| Significant Special Projects | EG_SPECIAL_PROJECT | Workforce Development, Faculty Events, Track Events, Significant Special Projects, Significant Special Projects | Track special projects for which employees are responsible. |
| Student Advisement           | EG_ADVISEMENT      | Workforce Development, Faculty Events, Track Events, Student Advisement, Student Advisement                     | Track information about any advisement activities.          |
| Teaching Responsibilities    | EG_TEACHING_RESP   | Workforce Development, Faculty Events, Track Events, Teaching Responsibilities, Teaching Responsibilities       | Track faculty teaching responsibilities.                    |

## Tracking an Employee's Activities

Access the Activities page.

Personal Information
Academics
**Activities**
Interests

Paul Acosta
AA0002

**Test ID:** ACT
ACT Assessment

**Test Information**
Find | View All
First 1 of 1 Last

**Test Date:** 10/06/2004
☐ **Caused Personal Data Creation**

**College Expected Extracurricular Activities**
Find | View All
First 1 of 1 Last

**\*Activities**

**Participation**

Intramural Athletics
☒

**High School Activities**
Find | View All
First 1 of 1 Last

**\*Activities**

**Participated**

Racial or Ethnic Organizations
☒

Activities page

- Compensated

Select *Y* if the employee was compensated for the activity, or *N* if the employee was not compensated.
- Organization

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

Setting Up Administrative Posts

Access the Administrative Post Table page.

Administrative Post Table

\*Administrative Post:

Chair

Description:

Chair

Post Type:

Academic Responsibility

Administrative Post Table page

- Administrative Post

Enter the name of the administrative post, appointment, or title, such as *Chair*.
- Stats Can Responsibility  
(Statistics Canada  
Responsibility)

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

Tracking Administrative Posts, Titles, and Appointments

Access the Administrative Posts page.

Administrative Posts

William Niles

ID: PU018

Tenure/Home Dept: 90310

Tenure Status: On Track

Academic Rank: Professor

Administrative Posts

Find | View All First 1 of 1 Last

\*Administrative Post: Chair Chair

Post Type: Academic Responsibility

\*Appointment Type: Initial Appointment

Description: Chair of Admissions Board

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

Revision Date: Reason:

SetID: PSUSI Department: 90310 Electrical Engineering

Organization: State University

Comments:

Administrative Posts page

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

## Tracking School Education

Access the School Education page.

School EducationProfessional Ed. and Training

William Niles

ID: PU018

School Education

Find | View All | First 1 of 1 Last

Country:

USA

+

-

School Type:

UNK

Unknown

Level Achieved:

DEG

Degree

Date Acquired:

06/06/2002

31

Average Grade:

4.0

☒ Completed

School Code:

F00001

School Name:

Berkeley, University of CA

State:

CA

California

Area of Study

Customize | Find | View All | First 1 of 1 Last

| *Area of Study   | Grade |   |   |
|------------------|-------|---|---|
| Computer Science | 4.0   | + | - |

School Education page

**Date Acquired** Enter the date when the employee achieved the level of education.

**Completed** Select if the employee completed the program.

## Tracking Professional Education and Training

Access the Professional Ed. and Training page.

William Niles ID: PU018

**School Education** **Professional Ed. and Training**

**Professional Education** Find | View All First 1 of 1 Last

Country: USA United States

\*Degree: BS Bachelor of Science ☒ **Terminal Degree**

Date Acquired: 05/13/1982 Average Grade: 3.25 ☒ **Graduated**

Major Code: K000012 Major: Mechanical Engineering

School Code: KUS021 School: Georgetown University

Educator:

State: DC District of Columbia ☐ **Minority Institution**

**Training** Customize | Find | View All First 1 of 1 Last

| Course Title | School Name | Start Date | End Date |
|--------------|-------------|------------|----------|
|              |             |            |          |

Professional Ed. and Training page

### Degree

Select the degree the employee has earned.

### Terminal Degree

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

**Note.** This field will only appear if Education & Government is activated on the installation table.

### Date Acquired

Enter the date the employee acquired the degree.

### Graduated

Select if the employee graduated.

### Major Code and Major

When you select a major code, the system automatically displays the corresponding major and makes the Major field unavailable for entry. To enter a major that does not have a code, leave the Major Code field blank and enter a description in the Major field.

### Educator

Enter additional information about the educator, such as organization (other than school), or instructor's name.

## Tracking Honors and Awards

Access the Honors & Awards page.

Honors & Awards

William Niles

ID: PU018

| Honors and Awards |                 |                                |                     |            |          |  | Customize | Find | View All | First | 1-3 of 3 | Last |
|-------------------|-----------------|--------------------------------|---------------------|------------|----------|--|-----------|------|----------|-------|----------|------|
|                   | *Honor or Award |                                | Grantor             | Issue Date | End Date |  |           |      |          |       |          |      |
| 1                 | BOD             | Board of Directors Appointment | Bill Haley          | 01/15/1999 |          |  |           |      |          |       |          |      |
| 2                 | CSS             | Community Service Award        | David Petrillo      | 03/21/2001 |          |  |           |      |          |       |          |      |
| 3                 | NMS             | National Merit Scholarship     | Harvey Schneadecker | 05/02/2002 |          |  |           |      |          |       |          |      |

Honors & Awards page

### Honor or Award

Select the honor or award code. The system automatically displays a description.

## Tracking Licenses and Certifications

Access the Licenses and Certifications page.

Licenses and Certifications

William Niles

ID: PU018

| Licenses and Certifications |                                                         | Find | View All                   | First | 1 of 1 | Last |
|-----------------------------|---------------------------------------------------------|------|----------------------------|-------|--------|------|
| *License/Certificate Code:  | SRP                                                     |      | Safety Recognition Program |       |        |      |
| Issue Date:                 | 03/29/1996                                              |      |                            |       |        |      |
| License #:                  | 123456                                                  |      |                            |       |        |      |
| Issued By:                  | WH Safety Board                                         |      |                            |       |        |      |
| Expiration Date:            | 03/29/1998                                              |      |                            |       |        |      |
|                             | <input checked="" type="checkbox"/> License Verified    |      |                            |       |        |      |
|                             | <input checked="" type="checkbox"/> Renewal in Progress |      |                            |       |        |      |
| Issued In                   |                                                         |      |                            |       |        |      |
| Country:                    | USA                                                     |      | State:                     |       |        |      |

Licenses and Certifications page

### License/Certificate Code

Select the code for the license or certificate that the employee earned.

### License Verified

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

### Renewal in Progress

Select if the employee is currently renewing the license or certificate.

## Tracking Memberships in Professional Organizations

Access the Memberships page.

**Memberships**

William Niles ID: PU018

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

Memberships page

### Organization

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

### Mandate, Mandate Position, Mandate Begin Date, and Mandate End Date

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

## Tracking Presentations

Access the Presentations page.

**Presentations**

William Niles ID: PU018

**Tenure/Home Dept:** 90310

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

| Presentations        |                                                 | Find | View All | First | 1 of 1 | Last |
|----------------------|-------------------------------------------------|------|----------|-------|--------|------|
| *Presentation Type:  | Conference                                      |      |          |       |        |      |
| Presentation Date:   | 05/15/1999                                      |      |          |       |        |      |
| *Presentation Title: | The Future for Electrical Engineering           |      |          |       |        |      |
| Audience/ Function:  | International Brotherhood of Electrical Workers |      |          |       |        |      |
| Location:            | Munich                                          |      |          |       |        |      |
| Comments:            |                                                 |      |          |       |        |      |

Presentations page

### Presentation Type

Select the type of presentation the employee performed.

## Tracking Publications

Access the Publications page.

Publications

Winston Whitefeather

CC0039

Publication Detail

Find | View All First 1 of 1 Last

\*Publication Number:

1

+

-

Publication Type:

Article

Author Type:

Author

Publication Title:

Diabetes and the American Indian

Publication Name:

Nevada News Weekly

Publisher:

AMI Publications, Inc.

Publication Information

☐
Date Format (PowerPlay Only)

Date:
07/01/2004

Volume:

Issue:

Page Number(s):

B-12

Notes:

Publications page

### Date Format For PowerPlay and Date

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

## Tracking Significant Special Projects

Access the Significant Special Projects page.

| Significant Special Projects                                                          |                                                                                   |
|---------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|
| William Niles                                                                         | ID: PU018                                                                         |
| Tenure/Home Dept: 90310                                                               |                                                                                   |
| Academic Rank: Professor                                                              | Tenure Status: On Track                                                           |
| <div> <div>Special Projects</div> <div>Find   View All First 1 of 1 Last</div> </div> |                                                                                   |
| *Date Completed:                                                                      | 04/28/1988                                                                        |
| Department:                                                                           | 90310                                                                             |
| Organization:                                                                         | Science World / State University                                                  |
| Description:                                                                          | Supervising professor to engineering students setting up exhibit at Science World |

Significant Special Projects page

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

## Tracking Student Advisees

Access the Student Advisement page.

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

Student Advisement page

Student Name

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

## Tracking a Faculty Member’s Teaching Responsibilities

Access the Teaching Responsibilities page.

Teaching Responsibilities

William Niles

ID: PU018

Tenure/Home Dept: 90310

Tenure Status: On Track

Academic Rank: Professor

Teaching Responsibilities

Find | View All

First 1 of 1 Last

\*Course ID: 1357

Title: The Future of Electrical Engineering

Course Type: Discussion

Units: 3

Term: 1

Year: 2000

☐ Team Taught

Percent: 50.00

Enrollment Information

Find | View All

First 1 of 1 Last

Enrollment Type

UnderGrad

Number Enrolled

45

Teaching Responsibilities page

Course ID (course identification)

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

Term

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

Team Taught

Select if a team of instructors teaches the course.

Percent

Enter the percent of the course for which the employee is responsible to teach.

## Tracking Committee Information

This section discusses how to:

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

## Pages Used to Track Committee Information

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

## Setting Up Committee Types

Access the Committee Type page.

Committee Type

Committee Type:

SOCIAL

Committee Type Information

Find | View All First 1 of 1 Last

\*Effective Date:

01/03/2000

\*Status:

Active

\*Description:

Social Events

Short Description:

Social

Committee Role Information

Find | View All First 1 of 1 Last

\*Committee Role:

Staff

\*Description:

Social Planners

Short Description:

Planners

Committee Type page

## Committee Role Information

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

**Note.** You can add additional committee roles to new committee types only, but not to existing committee types.

## Establishing Committees

Access the Committee page.

Committee Committee Members

Academic Institution:

PSUNV PeopleSoft University

Committee:

ALUMNI

Committee Details

Find | View All First 1 of 1 Last

\*Effective Date:

01/24/1997

\*Status:

Active

\*Committee Name:

Alumni Committee

\*Committee Type:

ALUMNI

Alumni Scholarship Committee

Description:

Alumni Scholarship Committee

Committee page

## Committee Type Information

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

## Assigning Committee Members

Access the Committee Members page.

The screenshot displays the 'Committee Members' page. At the top, there are tabs for 'Committee' and 'Committee Members'. Below the tabs, the 'Academic Institution' is 'PSUNV PeopleSoft University' and the 'Committee' is 'ALUMNI Alumni Committee'. The 'Committee Details' section shows the 'Effective Date' as '01/24/1997' and the status as 'Active'. The 'Committee Members' section lists two members:

| *Member Number: | *ID: | Name: | *Role:             | *Start Date: | *End Date: |
|-----------------|------|-------|--------------------|--------------|------------|
| 1               | 8113 |       | Chair of Committee | 01/24/1997   | 01/24/1998 |
| 2               | 8001 |       | (Invalid Value)    | 01/24/1997   | 01/24/1998 |

Committee Members page

## Member Information

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

**Role** Select the role of the committee member.

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

## Viewing Employee Committees

Access the Employee Committees page.

**Employee Committees**

Betty Locherty

**Person ID:** KU0007

Find | View All

First ◀ 1 of 1 ▶ Last

|                        |                                |                    |            |
|------------------------|--------------------------------|--------------------|------------|
| <b>Effective Date:</b> | 01/03/2000                     | <b>Member Nbr:</b> | 3          |
| <b>Committee:</b>      | SOCIAL Social Events           |                    |            |
| <b>Role:</b>           | STAF Staff member of Committee |                    |            |
| <b>Start Date:</b>     | 10/01/2002                     | <b>End Date:</b>   | 10/01/2003 |

Employee Committees page

# CHAPTER 5

## Managing Cases

This chapter discusses how to define and review employee cases.

---

### Defining and Reviewing Employee Cases

This section discusses how to:

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

---

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

---

### Common Elements Used in This Chapter

|                                                      |                                                                                              |
|------------------------------------------------------|----------------------------------------------------------------------------------------------|
| <b>Tenure/Home Dept</b> (tenure and home department) | Displays the employee's home department from the Tenure Data page or the Job Data component. |
| <b>Academic Rank</b>                                 | Displays the employee's current academic rank from the Tenure Data page.                     |

## Pages Used to Define and Review Employee Cases

| Page Name             | Object Name       | Navigation                                                                                          | Usage                                                                                                                                                                                                          |
|-----------------------|-------------------|-----------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Case Review           | EG_CASE_REVIEW    | Workforce Development, Faculty Events, Manage Cases, Identify Employee Case, Case Review            | Define an employee case. For example, a case could involve a decision to give a faculty member a change in tenure status, or a title change.                                                                   |
| Review Path           | EG_REVIEW_PATH    | Workforce Development, Faculty Events, Manage Cases, Case Information, Review Path                  | Review case information by selecting the employee and the case ID that you want to review.                                                                                                                     |
| Case View             | EG_CASE_REVIEW_VW | Workforce Development, Faculty Events, Manage Cases, Case Progress, Case View                       | View the less sensitive information from the Case Review and Review Path pages. This page is display only.                                                                                                     |
| Case Final Status     | EG_CASE_FIN_VW    | Workforce Development, Faculty Events, Manage Cases, Review Case Status, Case Final Status          | View the final, approved employee cases. Use this information as a reference when you enter resulting changes in the faculty member's Job Data component. This page displays details from approved cases only. |
| Faculty Events Report | RUNCTL_EVENTS     | Workforce Development, Faculty Events, Track Events, Faculty Events Hist Rpt, Faculty Events Report | List all tracking events for the employee specified, including activities, administrative posts, appointments and titles, education, training and so on.                                                       |

## Defining the Purpose of a Case

Access the Case Review page.

**Case Review**

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

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

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

Case Review page

## Case Information

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

## Proposed

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

**Academic Rank** Select the proposed academic rank.

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

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

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

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

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

## Reviewing Information From Specific Reviewers

Access the Review Path page.

Review Path

William Niles

ID: PU018

Tenure/Home Dept: 90310 Electrical Engineering

Annual Rate: 40000.000

Academic Rank: Professor

Tenure Status: On Track

Case ID: P001 Case Type: Title

Case Status: Disapprove

Recommendation

Find | View All First 1 of 2 Last

\*Review Dept: 90310

\*Step: 2

Reviewer EmplID:

Reviewer Team: Board of Directors

Case Received Date: 06/01/1998

Recommendation Date: 06/01/1998

Recommendation: Disapprove

Forwarded Date: 06/01/1998

Forward Department: 90310 Electrical Engineering

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

Notes:

Review Path page

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

## Recommendation

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

**Step** Each employee ID and case can have multiple reviewers. Each reviewer receives a step number.  
Use the scroll arrow to display multiple reviewers. As you insert rows, the step number increases in increments of one.

**Reviewer EmplID** (reviewer employee identification) Select the employee ID of the person reviewing the case.

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

**Case Received Date** Enter the date the reviewer received the case.

**Recommendation Date** Enter the date the reviewer made the recommendation.

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

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

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

**Final Action** Select if this is the last reviewer of the case.

**Next Case Type and Next Review Date**

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

## Viewing Case Data and Recommendations

Access the Case View page.

| Case View                                                                                                             |                                     |                      |            |
|-----------------------------------------------------------------------------------------------------------------------|-------------------------------------|----------------------|------------|
| William Niles                                                                                                         |                                     | ID:                  | PU018      |
| Tenure/Home Dept:                                                                                                     | 90310                               | Annual Rate:         | 40000.000  |
| Academic Rank:                                                                                                        | Professor                           | Tenure Status:       | On Track   |
| <b>Proposed</b> <a href="#">Find</a>   <a href="#">View All</a> First <span>◀</span> 1 of 2 <span>▶</span> Last       |                                     |                      |            |
| Case ID:                                                                                                              | P001                                | Case Type:           | Title      |
| Tenure Status:                                                                                                        | Not on Trk                          | Case Status:         | Disapprove |
| Title:                                                                                                                | Professor                           | Acad Rank:           |            |
| Annual Rate:                                                                                                          | 40000.000                           | FTE:                 | 1.000000   |
| Begin Date:                                                                                                           | 01/01/1996                          |                      |            |
| <b>Recommendation</b> <a href="#">Find</a>   <a href="#">View All</a> First <span>◀</span> 1 of 2 <span>▶</span> Last |                                     |                      |            |
| Review Dept:                                                                                                          | 90310                               | Step:                | 2          |
| Reviewer EmplID:                                                                                                      |                                     |                      |            |
| Reviewer Team:                                                                                                        | Board of Directors                  |                      |            |
| Case Received Date:                                                                                                   | 06/01/1998                          | Recommendation Date: | 06/01/1998 |
| Forward Department:                                                                                                   | 90310                               | Forward Dt:          | 06/01/1998 |
| Final Action                                                                                                          | <input checked="" type="checkbox"/> | Next Case Type:      | Tenure     |
|                                                                                                                       |                                     | Next Review Date:    | 12/01/1998 |

Case View page

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

## Reviewing Case Status

Access the Case Final Status page.

| Case Final Status                      |                         |
|----------------------------------------|-------------------------|
| William Niles                          | ID: PU018               |
| Tenure/Home Dept: 90310                | Annual Rate: 40000.000  |
| Academic Rank: Professor               | Tenure Status: On Track |
| Case Final Information                 |                         |
| Find   View All                        | First 1 of 1 Last       |
| Case ID:                               | Case Type:              |
| Tenure Status:                         | Academic Rank:          |
| Title:                                 | FTE:                    |
| Begin Date:                            |                         |
| <input type="checkbox"/> Outside Offer | Details:                |
| Notes:                                 |                         |

Case Final Status page

View the final, approved employee cases. Use this information as a reference when you enter resulting changes in the faculty member's Job Data component. This page displays details from approved cases only.

## Generating the Faculty Events History Report

Access the Faculty Events Report page.

| Faculty Events Report     |                                                                                                   |
|---------------------------|---------------------------------------------------------------------------------------------------|
| Run Control ID: 123       | <a href="#">Report Manager</a> <a href="#">Process Monitor</a> <input type="button" value="Run"/> |
| Report Request Parameters |                                                                                                   |
| EmplID:                   | <input type="text" value="PU018"/> <input type="button" value="Search"/> William Niles            |

Faculty Events Report page

### Run Control ID

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

### Report Request Parameters

#### EmplID

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

**Run**

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



## CHAPTER 6

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

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

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

### See Also

*PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, “PeopleSoft Application Fundamentals for HRMS Reports,” Track Faculty Events Reports

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## Understanding the Statistics Canada Academic Teaching Surveys Business Process

Track Faculty Events business process provides the functionality to create the legislatively required Academic Teaching Survey reports by associating PeopleSoft HRMS information with Statistics Canada codes.

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

### Setting Up PeopleSoft HRMS Control Tables

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

- Department Table: StatsCan - Dept (Statistics Canada Department) and StatsCan - Faculty.  
Maintain StatsCan values in the Faculty Code Table.
- Job Code component: StatsCan Teaching Survey Codes.
- Company Table: StatsCan Institution Code.
- Country Table: Statistics Canada Location Code.

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

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- Canadian Tax Table: StatsCan Province Code.

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

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

### See Also

*PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*

## Setting Up Track Faculty Events Tables

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

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

### See Also

Chapter 3, “Setting Up Track Faculty Tenure,” Establishing Academic Ranks, page 36

Chapter 4, “Tracking Events,” Setting Up Administrative Posts, page 58

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## Setting Up the Statistics Canada Academic Teaching Surveys Business Process

To set up the Statistics Canada Academic Teaching Surveys, use the Principal Subjects Taught (HP\_STATS\_SUBJECTS), Faculty Code Stats CAN (HP\_STATS\_FACULTY), Non-Operational Fund Table CAN (HP\_NON\_OP\_FUNDS) and Reporting Period Stats CAN (HP\_REPORTING\_PRD) components.

This section discusses how to:

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

## Pages Used to Set Up the Canadian Teaching Surveys Business Process

| Page Name                       | Object Name       | Navigation                                                                                                                    | Usage                                                                                                                                |
|---------------------------------|-------------------|-------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|
| Principal Subjects Taught       | HP_STATS_SUBJECTS | Set Up HRMS, Product Related, Workforce Development, Faculty Events, Principal Subjects Taught, Principal Subjects Taught     | Maintain Statistics Canada principal subjects taught codes and descriptions.                                                         |
| Faculty Code Stats CAN          | HP_STATS_FACULTY  | Set Up HRMS, Product Related, Workforce Development, Faculty Events, Faculty Code Stats CAN, Faculty Code Table               | Store information regarding faculty codes. The Department Table references this table to associate a faculty with a department.      |
| Non-Operational Funds Table CAN | HP_NON_OP_FUNDS   | Set Up HRMS, Product Related, Commitment Accounting, Fringe Costs, Non-Operational Funds Table CAN, Non-Operation Funds Table | Identify non-operational funding sources.<br><br>This table is for Ontario universities only.                                        |
| Reporting Period Stats CAN      | HP_RPTNG_PRD_PNL  | Set Up HRMS, Product Related, Workforce Development, Faculty Events, Reporting Period Stats CAN, Reporting Period Table       | Create and maintain report period dates and parameters for the survey run controls. Update the reporting period each reporting year. |

## Maintaining Principal Subjects Taught Codes

Access the Principal Subjects Taught page.

**Principal Subjects Taught**

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**Stats-Can Acad Teaching Survey**

**Principal Subject Taught Code:** 61200

**\*Description:** Mechanical Engineering

**Short Description:** Mech. Eng.

Principal Subjects Taught page

### Principal Subject Taught Code

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

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

## Defining Faculty Codes

Access the Faculty Code Table page.

Faculty Code Table

Stats-Can Acad Teaching Survey

Faculty Code:

ENG

\*Description:

Engineering

Short Description:

Eng

\*Medical/Dental Category:

Not Applicable

Faculty Code Table page

- Faculty Code

Displays the code for a faculty at your educational institution. Use this code to associate faculty with departments in the Department Table.
- Medical/Dental Category

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

## Identifying Non-Operational Funding Sources

Access the Non-Operation Funds Table page.

Non-Operation Funds Table

Non-Operation Fund Account:

000000001

Salaries

Stats-Can Acad Teaching Survey

\*Status:

Active

Non-Operation Funds Table page

- Non-Operation Fund Account

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

## Maintaining Reporting Period Dates and Parameters

Access the Reporting Period Table page.

| Reporting Period Table                                                                                                                                                                                                              |                                                                                                                  |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------|
| <b>For Full-Time Survey</b>                                                                                                                                                                                                         |                                                                                                                  |
| *Start Date: 01/08/1999                                                                                                                            | End Date: 01/07/2000                                                                                             |
| <b>HR Action/Categories</b>                                                                                                                                                                                                         |                                                                                                                  |
| Sabbatical: CAT_PSB                                                                                                                                | Other Paid Leave: CAT_PLA_SC  |
| Workload Reduction: CAT_PAY                                                                                                                        | Unpaid Leave: CAT_LOA         |
| HPH900CN Last Run Date: (Faculty Member Data Load)<br>HPH901CN Last Run Date: 06/01/2000 (Survey Data Load)<br>FT Filename: FT1999 HPH903CN Last Run Date: (Stats-Can Report File)<br>HPH905CN Last Run Date: (Verification Report) |                                                                                                                  |
| <b>For Part-Time Survey</b>                                                                                                                                                                                                         |                                                                                                                  |
| *Start Date: 01/08/1998                                                                                                                            | End Date: 01/07/1999                                                                                             |
| HPH902CN Last Run Date: 06/14/2002 (Survey Data Load)<br>PT Filename: PT1998 HPH904CN Last Run Date: (Stats-Can Report File)                                                                                                        |                                                                                                                  |

Reporting Period Table page

## For Full-Time Survey

### Start Date and End Date

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

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

### HR Action/Categories

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

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

#### FT Filename (full-time filename)

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

## For Part-Time Survey

### Start Date and End Date

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

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

#### PT Filename (part-time filename)

Enter the name of the PT survey report flat file.

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

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### See Also

*PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, “Increasing the Workforce,” Entering Optional Employment-Related Data

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## Loading and Modifying Data in the FT Academic Teaching Member Table

This section provides an overview of the Load FT Teaching Member Data process and discuss how to:

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

### Understanding the Load FT Teaching Member Data Process

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

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

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

Part-time employees do not have a corresponding table.

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

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

| Page Name                                                          | Object Name        | Navigation                                                                                                                | Usage                                                                                                                                                                                                      |
|--------------------------------------------------------------------|--------------------|---------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Load FT Teaching Member Data (load full-time teaching member data) | RUNCTL_HPH900CN    | Workforce Development, Faculty Events, Load Teaching Data CAN, Load FT Teaching Member Data, Load FT Teaching Member Data | Load teaching member data into the FT Academic Teaching Member Table.                                                                                                                                      |
| Member Data                                                        | HP_FT_TEACH_MEMBER | Workforce Development, Faculty Events, Qualify Academic Teaching CAN, Full-Time Member, Member Data                       | Modify teaching member records to control the survey results. When you insert a new row on this page, the default field values are from the previous reporting year (except for the Reporting Year field). |

### Loading Teaching Member Data

Access the Load FT Teaching Member Data page.

Load FT Teaching Member Data

Run Control ID: GN2

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

Run

Reporting Period: 1999

Start Date: 01/08/1999

End Date: 01/07/2000

Load FT Teaching Member Data page

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

|                                |                                                                                                                                                                                                                                                                                      |
|--------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Reporting Period</b>        | Displays the year of the data to load into the FT Academic Teaching Member Table.<br><br>Maintain Reporting Periods on the Reporting Period page.                                                                                                                                    |
| <b>Start Date and End Date</b> | Displays the start and end dates of the employment year used to assess twelve months of employment and compensation amounts.<br><br>The system calculates the end date to be one day less than a year from the start date.<br><br>Maintain start dates on the Reporting Period page. |

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, “Increasing the Workforce,” Entering Employee Job Location and Position Information

Maintaining Teaching Member Records

Access the Member Data page.

Member Data

William Niles

Person ID: PU018

Member Information

Find | View All

First 1 of 1 Last

\*Reporting Year:

1999

Reportable Employment Rcd Nbr:

0

Canadian Resident Status

☐

Visiting Faculty

☐

\*Previous Employment:

Military

Previous Employment Province:

Stats-Can Province Code:

\*Previous Employment Country:

BRB

Stats-Can Country Code:

04623

\*Salary Status:

Regular

Member Data page

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

|                                                                            |                                                                                                                                                                                                                                                                                                                           |
|----------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Reporting Year</b>                                                      | Displays the year of the data that appears in the survey. If you manually add a new teaching member record, you must enter the reporting year.                                                                                                                                                                            |
| <b>Reportable Employment Rcd Nbr</b> (reportable employment record number) | Enter the number of the employment record for the primary FT job being reported. If you loaded the information for this teaching member using the Load FT Teaching Member Data page, this value comes from the Statistics Canada Academic Teaching Employment Table on the Employment Data – Employment Information page. |
| <b>Canadian Resident Status</b>                                            | Select this check box if the employee had Canadian resident status at the time of job offer.                                                                                                                                                                                                                              |
| <b>Visiting Faculty</b>                                                    | Select this check box if the employee is a visiting faculty member.                                                                                                                                                                                                                                                       |
| <b>Previous Employment Province</b>                                        | If the country of the employee’s previous employment is Canada, select the province of previous employment.                                                                                                                                                                                                               |

## Loading Data Into the Academic Teaching Survey Tables

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

### Understanding the Load Teaching Survey Data Process

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

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

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

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

### Conditions for FT Survey Data

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

- Has a record in the FT Academic Teaching Member Data Table for the reporting year. The employee's job can span the entire reporting year, or it can begin during the reported year. Employees who do not have a teaching member record do not appear in the FT survey report.
- Was employed on October 1 of the reporting year.
- Has a Statistics Canada reporting job (the value of the Survey Report Flag field in the Statistics Canada Academic Teaching Employment Table on the Employment Data – Employment Information page is *FT* or *Both*).

### Conditions for PT Survey Data

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

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

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

## Common Elements Used in This Section

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

## Pages Used to Load Data Into the Academic Teaching Survey Tables

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

## Loading FT Survey Data

Access the FT Survey page.

FT SurveyPT Survey

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

Reporting Period: 1999
Start Date: 01/08/1999
End Date: 01/07/2000
EmplID:

**HR Action/Categories**
Sabbatical: CAT\_PSB
Workload Reduction: CAT\_PAY
Unpaid Leave: CAT\_LOA
Other Paid Leave: CAT\_PLA\_SC

**Administrative Stipend Earnings Codes**
Customize | Find | View All |
First 1 of 1 Last

| Earnings Code | Description |
|---------------|-------------|
| 1 QBA         | Bonus/Award |

FT Survey page

## HR/Action Categories

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

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

**Earnings Code**

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

## Viewing and Modifying Survey Results

This section discusses how to:

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

## Common Elements Used in This Section

**Reporting Year**

Maintain reporting periods on the Reporting Period Table page.

**Level of Highest Degree**

Displays the Statistics Canada degree level from the Professional Ed. and Training page.

Maintain degree levels in the Degree Table.

**Year of Highest Degree** Displays the year the employee received his or her highest degree from the Professional Ed. and Training page.

## Pages Used to View and Modify Academic Teaching Survey Results

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

### Viewing FT Survey Results (Part 1)

Access the FT Survey Part 1 page.

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

FT Survey Part 1 page

## FT Survey Information

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

**Immigrtn Status**  
(immigration status)

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

## Viewing FT Survey Results (Part 2)

Access the FT Survey Part 2 page.

| FT Survey Part 1                                                                                                                                                 |                                    | FT Survey Part 2                                             |                                      |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|--------------------------------------------------------------|--------------------------------------|
| William Niles                                                                                                                                                    |                                    | Person ID: PU018                                             |                                      |
| <b>FT Survey Information</b> <a href="#">Find</a>   <a href="#">View All</a> First <input type="button" value="◀"/> 1 of 1 <input type="button" value="▶"/> Last |                                    |                                                              |                                      |
| <b>Reporting Year:</b>                                                                                                                                           | 1999                               |                                                              |                                      |
| <b>Stats-Can Rank:</b>                                                                                                                                           | Full Professor                     |                                                              |                                      |
| <b>Stats-Can Responsibility:</b>                                                                                                                                 | Teaching - No other adm duties     | <b>Medical/Dental Category:</b> Not Applicable               |                                      |
| <b>Year of Appointment to Rank:</b>                                                                                                                              | 1999                               | <b>Type of Appointment:</b>                                  | Non-Vstng Tchng Mbr Non-Tenured      |
| <b>Salary Earned</b>                                                                                                                                             |                                    |                                                              |                                      |
| <b>Actual Salary:</b>                                                                                                                                            | <input type="text" value="27670"/> | <b>Annual Salary:</b>                                        | <input type="text" value="20752"/>   |
| <b>Administrative Stipends:</b>                                                                                                                                  | <input type="text"/>               | <input type="text" value="9"/> <b>Months Not On Leave</b>    | <b>Salary Status:</b> Regular        |
| <b>Ontario Final Rate of Salary:</b>                                                                                                                             | <input type="text"/>               | <input type="text"/> <b>Months On Sabbatical</b>             | <b>Last Load Date:</b> 06/01/2000    |
| <b>Ontario Salary Source:</b>                                                                                                                                    | <input type="text" value="00"/>    | <input type="text"/> <b>Months On Other Paid Leave</b>       | <b>Last Date Changed:</b> 06/01/2000 |
| <b>Percentage of Load Reduction:</b>                                                                                                                             | <input type="text"/>               | <input type="text" value="3"/> <b>Months On Unpaid Leave</b> | <b>Last Date Reported:</b>           |
| 12 <b>Total Months</b>                                                                                                                                           |                                    |                                                              |                                      |

FT Survey Part 2 page

**Stats-Can Rank**

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

**Stats-Can Responsibility**

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

**Year of Appointment to Rank**

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

**Type of Appointment**

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

**Salary Earned**

**Actual Salary**

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

The actual salary amount includes contracts, leaves, reduced workloads, and salaries for multiple jobs identified by the Collapse as FT check box in the Statistics Canada Academic Teaching Employment Table on the Employment Data – Employment Information page. The salary does not

|                                     |                                                                                                                                                                                                                                                                                                                              |
|-------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                     | include administrative stipends or salary increases effective after October 1 of the reporting year.<br><br>The system uses decimal months to calculate actual salary, which may result in skewed figures. You can modify this field.                                                                                        |
| <b>Annual Salary</b>                | Displays the actual salary. If the employee has not had a reduced workload and has been working for the entire 12 months of the reporting year, the Annual Salary is the same as the actual salary. The salary does not include administrative stipends or salary increases effective after October 1 of the reporting year. |
| <b>Salary Status</b>                | Displays the salary status from the Member Data page.                                                                                                                                                                                                                                                                        |
| <b>Administrative Stipends</b>      | Displays the amount paid for stipends and honoraria for administrative duties for the reporting year, based on job earnings distribution records.<br><br>The system uses decimal months to calculate administrative stipends, which may result in skewed figures. You can modify this field.                                 |
| <b>Ontario Final Rate of Salary</b> | Displays the final rate of salary for Ontario-based institutions, based on the annual salary and administrative stipends.                                                                                                                                                                                                    |
| <b>Ontario Salary Source</b>        | Displays the salary source for Ontario-based institutions, based on the job earnings distribution amounts distributed to non-operational funding accounts, excluding administrative stipend amounts.                                                                                                                         |
| <b>Percentage of Load Reduction</b> | Displays the percentage by which an employee’s workload has been reduced, based on the Std Hrs (standard hours) in the Job Data and the Job Code components.<br><br>The system calculates this value as follows:                                                                                                             |

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

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

**See Also**

*PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, “Increasing the Workforce,” Entering Optional Employment-Related Data

**Viewing PT Survey Results (Part 1)**

Access the PT Survey Part 1 page.

PT Survey Part 1
PT Survey Part 2

Rhonda Starr
Person ID: PU019

Find | View All
First 1 of 1 Last

**Reporting Year:** 1994  
**Gender:** Female  
☐ **Bargaining Agent**  
**Year of Birth:** 1958

**Degree Earned**

**Level of Highest Degree:** No Degree/Diploma/Prof.Desgntn  
**Year of Highest Degree:** 9898  
**Last Load Date:** 06/14/2002  
**Number of Appointments To Be Reported:** 1  
**Last Date Changed:**  
**Last Date Reported:**

PT Survey Part 1 page

**Bargaining Agent**

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

**Number of Appointments To Be Reported**

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

## Viewing PT Survey Results (Part 2)

Access the PT Survey Part 2 page.

PT Survey Part 1

PT Survey Part 2

Rhonda Starr

Person ID: PU019

Find | View All

First 1 of 1 Last

Reporting Year: 1994

Find | View All

First 1 of 1 Last

Employment Rcd Nbr: 0

Work Duration Start Date: 01/01/1995

End Date: 09/30/1995

Appointment Status: Part Time Appointment

Type of Appointment: Non-Tenure on Track

Principal Subject: Guidance and Counselling

Salary Paid: 1384

Stats-Can Teaching Load: 0.08

Full-Time Teaching Equivalent: 0.06

PT Survey Part 2 page

|                                 |                                                                                                                                                                                                                                                                                                                                                                                     |
|---------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Work Duration Start Date</b> | <p>If the job compensation frequency is contract, this field displays the contract effective date from the Contract Data page.</p> <p>If the job is not contract, this field displays the hire date from the Job Data Table (or the rehire date if the same employment record is used for successive appointments).</p>                                                             |
| <b>End Date</b>                 | <p>If the job compensation frequency is contract, this field displays the contract end date from the Contract Data page.</p> <p>If the job is not contract, this field displays the employment termination date or the appointment end date from the Job Data component.</p>                                                                                                        |
| <b>Appointment Status</b>       | <p>Displays the employee’s appointment status from the Job Data component. Values include:</p> <p>1: Full-time appointment working less than 12 months in the reporting period.</p> <p>2: Part-time appointment.</p> <p>3: Overload appointment of less than 12 months where the employee appeared in the FT survey report for the same reporting year as the PT survey report.</p> |
| <b>Type of Appointment</b>      | <p>Displays the type of appointment, based on the tenure status on the Tenure Data page and the duties in the Statistics Canada Academic Teaching Employment Table on the Employment Data – Employment Information page.</p>                                                                                                                                                        |
| <b>Principal Subject</b>        | <p>Displays the principal subject taught by the employee from the Statistics Canada Academic Teaching Employment Table on the Employment Data – Employment Information page. This is the Principal Subject taught as of the appointment end date.</p>                                                                                                                               |

|                                      |                                                                                                                                                                                                                                                                                                                                 |
|--------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Salary Paid</b>                   | Displays the salary paid, based on the compensation and Job Earnings Distribution information from the reporting year. The salary paid amount includes contracts, leaves, and reduced workloads.<br><br>The system uses decimal months to calculate salary paid, which may result in skewed figures. You can modify this field. |
| <b>Stats Can Teaching Load</b>       | Displays the employee's Statistics Canada teaching load from the Statistics Canada Academic Teaching Employment Table on the Employment Data – Employment Information page.                                                                                                                                                     |
| <b>Full-Time Teaching Equivalent</b> | Displays the employee's FT teaching equivalent from the Statistics Canada Academic Teaching Employment Table on the Employment Data – Employment Information page.                                                                                                                                                              |

### See Also

*PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, “Increasing the Workforce,” Entering Optional Employment-Related Data

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## Creating the Survey Report Flat Files

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

### Common Elements Used in This Section

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

## Pages Used to Create the Survey Report Flat Files

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

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## Verifying Survey Results with Statistics Canada

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

### Page Used to Verify Survey Results

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



## CHAPTER 7

# (AUS) Reporting DETYA for the Australian Higher Education Sector

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

- Set up DETYA reporting codes.
- Generate DETYA reports data.

---

## Understanding DETYA Reporting

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

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

## Understanding DETYA Calculations and Reference Dates

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

### Full-Time Staff

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

### Fractional Staff

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

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

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

## Casual Staff

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

### Job Function - Lecturing

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

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

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

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

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

---

## Setting Up DETYA Reporting Codes

To set up DETYA reporting, use the Classification Codes AUS (DETYA\_CURR\_CLS) and Organization Unit AUS (DETYA\_ORG\_UNT) components.

This section discusses how to:

- Maintain classification codes.
- Maintain organizational units.

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

## Pages Used to Set Up DETYA Reporting Codes

| Page Name            | Object Name       | Navigation                                                                                                                                                                                                                                   | Usage                                                    |
|----------------------|-------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------|
| Classification Codes | DETYA_CLSN_AUS    | Workforce Development, Faculty Events, Define Faculty Events Data, Classification Codes AUS, Classification Codes<br><br>Set Up HRMS, Product Related, Workforce Development, Faculty Events, Classification Codes AUS, Classification Codes | Define classification codes specific to DETYA reporting. |
| Organization Unit    | DETYA_ORGUNIT_AUS | Workforce Development, Faculty Events, Define Faculty Events Data, Organization Unit AUS, Organization Unit<br><br>Set Up HRMS, Product Related, Workforce Development, Faculty Events, Organization Unit AUS, Organization Unit             | Define organizational units specific to DETYA reporting. |

## Maintaining Classification Codes

Access the Classifications Codes page.

Classifications Codes page

### Classification Group Code

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

## Maintaining Organizational Units

Access the Organization Unit page.

Organization Unit

Organizational Unit: 154

Australia Higher Education Organization Unit Codes.

Find | View All First 1 of 1 Last

Effective Date: 07/01/2004 \*Status: Active

\*Description: University

Short Description: Univ

Organization Unit page

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

---

## Generating DETYA Reports Data

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

## Pages Used to Generate DETYA Reports

| Page Name             | Object Name    | Navigation                                                                                                  | Usage                                                                                                                                                                                                                                                                                                                                                                       |
|-----------------------|----------------|-------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| DETYA Data Generation | DETYA_PROCESS  | Workforce Development, Faculty Events, Manage DETYA Information AUS, Create DETYA, DETYA Data Generation    | Generate the permanent and casual DETYA data. This process saves the data to a temporary table. The details can be viewed or modified on the DETYA Inquiry page. Select the end date for the report.                                                                                                                                                                        |
| DETYA File Creation   | DETYA_FILE     | Workforce Development, Faculty Events, Manage DETYA Information AUS, Create DETYA File, DETYA File Creation | Generate the electronic file for the Permanent or Casual report after running the data generation process. Confirm that the correct report is running.<br><br>After running the report, review the error log. Use the DETYA Inquiry page to make any changes.                                                                                                               |
| DETYA Inquiry         | DETYA_PRCs_INQ | Workforce Development, Faculty Events, Manage DETYA Information AUS, Review DETYA, DETYA Inquiry            | Update DETYA reporting information by individual employees, by employee ID, employee record number, or name. Changes made to this page will be picked up by the DETYA File Creation process but not updated at the employee level (for example, job, personal data, or education). If any changes are made to this page, the DETYA File Creation process needs to be rerun. |

### See Also

*PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, “PeopleSoft Application Fundamentals for HRMS Reports,” Administer Workforce Reports



# Glossary of PeopleSoft Terms

|                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>absence entitlement</b>   | 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.                                                                                                                                                                                                                                               |
| <b>absence take</b>          | This element defines the conditions that must be met before a payee is entitled to take paid time off.                                                                                                                                                                                                                                                                                                                                                                      |
| <b>academic career</b>       | In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on). |
| <b>academic institution</b>  | In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.                                                                                                                                                                                                                                                                              |
| <b>academic organization</b> | In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.                                                                                                                                                                                   |
| <b>academic plan</b>         | In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.                                                                                                                                                                                                                                                                                                            |
| <b>academic program</b>      | In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.                                                                                                                                                                                                                                                                                                                                      |
| <b>accounting class</b>      | 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.                                                                  |
| <b>accounting date</b>       | 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. |
| <b>accounting split</b>      | The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.                                                                                                                                                                                                                                                                                                                                               |
| <b>accumulator</b>           | 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.                                                                                              |
| <b>action reason</b>         | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>action template</b>         | In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>activity</b>                | <p>In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.</p> <p>In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.</p> <p>In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.</p> <p>In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.</p> |
| <b>address usage</b>           | In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>adjustment calendar</b>     | In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>administrative function</b> | In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.                                                                                                                                                                                                                                                                                                                             |
| <b>admit type</b>              | In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>agreement</b>               | In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>allocation rule</b>         | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>alternate account</b>       | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>analysis database</b>       | In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered for satisfying a requirement but that are rejected. It also contains information on                                                                                                                                                                                                                                                                                     |

|                               |                                                                                                                                                                                                                                                                                                                                                                                                              |
|-------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                               | courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.                                                                                                                                                                                                                                                                                                |
| <b>Application Messaging</b>  | PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft and third-party applications. An application message defines the records and fields to be published or subscribed to.                                                                                                             |
| <b>AR specialist</b>          | Abbreviation for <i>receivables specialist</i> . In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.                                                                                                                                                                                                                                                          |
| <b>arbitration plan</b>       | In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.                                                                                                                                                                                                                                                                                 |
| <b>assessment rule</b>        | In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.                                                                                                                                                                                                            |
| <b>asset class</b>            | An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.                                                                                                                                                                                                                                                                            |
| <b>attribute/value pair</b>   | In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.                                                                                                                                                                                                                                                                                                |
| <b>audience</b>               | In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.                                                                                                              |
| <b>authentication server</b>  | A server that is set up to verify users of the system.                                                                                                                                                                                                                                                                                                                                                       |
| <b>base time period</b>       | In PeopleSoft Business Planning, the lowest level time period in a calendar.                                                                                                                                                                                                                                                                                                                                 |
| <b>benchmark job</b>          | In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.                                                                                                                                                                                                                                                    |
| <b>billing career</b>         | In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.                                                                                                                                                                                                                              |
| <b>bio bit or bio brief</b>   | In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.                                                                                                                                                                                                                       |
| <b>book</b>                   | In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.                                                                                                                                                                                                                                                |
| <b>branch</b>                 | A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.                                                                                                                                                                                                                                                                                                         |
| <b>budgetary account only</b> | 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."                                                                                                                                                                                                                  |
| <b>budget check</b>           | In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.                                                                                                                                                                                                                                                              |
| <b>budget control</b>         | 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. |

|                             |                                                                                                                                                                                                                                                                                                                                                                                               |
|-----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>budget period</b>        | 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.                                                                                                                                 |
| <b>business activity</b>    | The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.                                                                                                                                                                                                                                            |
| <b>business event</b>       | In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.<br><br>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).                                                            |
| <b>business process</b>     | A standard set of 17 business processes are defined and maintained by the PeopleSoft product families and are supported by Business Process Engineering group at PeopleSoft. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth.<br><br>See also <i>detailed business process</i> . |
| <b>business task</b>        | The name of the specific function depicted in one of the business processes.                                                                                                                                                                                                                                                                                                                  |
| <b>business unit</b>        | A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.                                                                                                                                                                                                                                                                |
| <b>buyer</b>                | In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.                                                                                                                                                                    |
| <b>campus</b>               | In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.                                                                                           |
| <b>catalog item</b>         | 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. A catalog item can have one or more learning activities.                        |
| <b>catalog map</b>          | In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company's catalog.                                                                                                                                                                                                                                                                      |
| <b>catalog partner</b>      | In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.                                                                                                                                                                                                                                                                  |
| <b>categorization</b>       | Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.                                                                                                                                                                                                                                                                                       |
| <b>category</b>             | In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.                                                                                                                              |
| <b>channel</b>              | In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.                                                                                                                                                                                                                                                                          |
| <b>ChartField</b>           | 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.                                                                                                                                                                                               |
| <b>ChartField balancing</b> | You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.                                                                                                                                                                                                                                                                                 |

|                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>ChartField combination edit</b> | The process of editing journal lines for valid ChartField combinations based on user-defined rules.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>ChartKey</b>                    | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>checkbook</b>                   | In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>checklist code</b>              | In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.                                                                                                                                                                                                                                                                                                                                                              |
| <b>class</b>                       | In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.<br><br>See also <i>course</i> .                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Class ChartField</b>            | 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> .                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>clearance</b>                   | In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.                                                                                                                                                                                                                                                                                  |
| <b>clone</b>                       | 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.                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>cohort</b>                      | In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it.<br><br>See also <i>population</i> and <i>division</i> .                                                                                                                                                                                                                                                                                            |
| <b>collection</b>                  | 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. |
| <b>collection rule</b>             | In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>comm key</b>                    | See <i>communication key</i> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>communication key</b>           | In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called <i>comm keys</i> or <i>speed keys</i> ) can be created for background processes as well as for specific users.                                                                                                                                                                                                                                            |
| <b>compensation object</b>         | 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.                                                                                                                                                                                                                                                                                                                                                                                                 |

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| <b>compensation structure</b>          | In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>component interface</b>             | A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft database information using a program instead of the PeopleSoft client.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>condition</b>                       | In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>configuration parameter catalog</b> | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>configuration plan</b>              | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>constituents</b>                    | In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).                                                                                                                                                                                                                                                                                              |
| <b>content reference</b>               | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>context</b>                         | <p>In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.</p> <p>In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions.</p> <p>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.</p> |
| <b>control table</b>                   | Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>cost profile</b>                    | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>cost row</b>                        | A cost transaction and amount for a set of ChartFields.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>course</b>                          | <p>In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab.</p> <p>See also <i>class</i>.</p>                                                                                                                                                                                                                                                                                                                            |
| <b>course share set</b>                | In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |

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| <b>current learning</b>           | In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>data acquisition</b>           | 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).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>data cube</b>                  | In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.                                                                                                                                                                                                                                                                                                                                                                    |
| <b>data elements</b>              | <p>Data elements, at their simplest level, define a subset of data and the rules by which to group them.</p> <p>For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>dataset</b>                    | A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>delivery method</b>            | <p>In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.</p> <p>In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.</p> |
| <b>delivery method type</b>       | In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>detailed business process</b>  | A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>dimension</b>                  | <p>In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes.</p> <p>In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollout structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.</p>                                                                                                              |
| <b>directory information tree</b> | In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>division</b>                   | <p>In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.</p> <p>See also <i>population</i> and <i>cohort</i>.</p>                                                                                                                                                                                                                                                                                                                                              |

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| <b>document sequencing</b>       | A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.                                                                                                                                                                                                            |
| <b>dynamic detail tree</b>       | A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.                                                                                                                                                                                                                                                                             |
| <b>edit table</b>                | 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.                                                                                                                                                                                              |
| <b>effective date</b>            | 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.                                                                                                                 |
| <b>EIM ledger</b>                | 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.                                                                                         |
| <b>elimination set</b>           | In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.                                                                                                                                                                                                                                                                                                                         |
| <b>entry event</b>               | In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.                                                                                                                                                                                                    |
| <b>equitization</b>              | In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.                                                                                                                                                                       |
| <b>equity item limit</b>         | In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally. |
| <b>event</b>                     | <p>A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.</p> <p>In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.</p>               |
| <b>event propagation process</b> | 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.                         |
| <b>exception</b>                 | In PeopleSoft Receivables, an item that either is a deduction or is in dispute.                                                                                                                                                                                                                                                                                                                                                         |
| <b>exclusive pricing</b>         | In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.                                                                                                                                                                                                                                                                           |
| <b>fact</b>                      | 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.                                                                                                                                            |

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| <b>financial aid term</b>   | In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.                                                                                                                                                                        |
| <b>forecast item</b>        | A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.                                                                                                                                                                 |
| <b>fund</b>                 | In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.                                                                                                                                                                                                                                                                                   |
| <b>gap</b>                  | In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.                                                                                                                                       |
| <b>generic process type</b> | 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.                                                                                                                                                                                                                                                                           |
| <b>gift table</b>           | In PeopleSoft Enterprise Campus Solutions, a table or so-called <i>donor pyramid</i> describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.                                                                                                    |
| <b>GL business unit</b>     | Abbreviation for <i>general ledger business unit</i> . A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.<br><br>See also <i>business unit</i> .                                                                                                                                                                                                                                                     |
| <b>GL entry template</b>    | Abbreviation for <i>general ledger entry template</i> . In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.                   |
| <b>GL Interface process</b> | Abbreviation for <i>General Ledger Interface process</i> . In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.                                                                                                      |
| <b>group</b>                | In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).<br><br>In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes. |
| <b>incentive object</b>     | 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.                                                                                                                                                                                                           |

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| <b>incentive rule</b>      | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>incur</b>               | In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>initiative</b>          | In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.                                                                                                                                                                                                                          |
| <b>inquiry access</b>      | In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.<br><br>See also <i>update access</i> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>institution</b>         | In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>integration</b>         | A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft applications to work seamlessly with other PeopleSoft applications or with third-party systems or software.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>integration point</b>   | An interface that a system uses to communicate with another PeopleSoft application or an external application.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>integration set</b>     | A logical grouping of integrations that applications use for the same business purpose. For example, the integration set ADVANCED_SHIPPING_ORDER contains all of the integrations that notify a customer that an order has shipped.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>item</b>                | In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).<br><br>In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.<br><br>In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment. |
| <b>item shuffle</b>        | In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>joint communication</b> | In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>keyword</b>             | In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |

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| <b>KPI</b>                  | An abbreviation for <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.                                                                                                                                                                                                                                                                                                                                                                |
| <b>LDIF file</b>            | Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft data and directory data.                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>learner group</b>        | In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.                                                                                                                                                                                             |
| <b>learning components</b>  | In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.                                                                                                                                                                                                                                                                |
| <b>learning environment</b> | In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.                                                                                                                                                                               |
| <b>learning history</b>     | In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>ledger mapping</b>       | 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. |
| <b>library section</b>      | 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.                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>linked section</b>       | 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.                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>linked variable</b>      | 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.                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>LMS</b>                  | Abbreviation for <i>learning management system</i> . In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.                                                                                                                                                                                                                                                                                              |
| <b>load</b>                 | In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>local functionality</b>  | 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.                                                                                                                                                                                                                                                                                                                                                                         |

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| <b>location</b>               | 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.                                                                                                                                                                                                                                                                                                                                    |
| <b>logistical task</b>        | In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider. |
| <b>market template</b>        | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>mass change</b>            | In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution.<br><br>See also <i>3C engine</i> .                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>match group</b>            | In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>MCF server</b>             | Abbreviation for <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>merchandising activity</b> | In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.                                                                                                                                                                                                                                                                                                                                                                      |
| <b>meta-SQL</b>               | Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>metastring</b>             | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>multibook</b>              | In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>multicurrency</b>          | The ability to process transactions in a currency other than the business unit's base currency.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>national allowance</b>     | In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>need</b>                   | In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |

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|                                              | is based on the amount of financial need. The process of determining a student's need is called <i>need analysis</i> .                                                                                                                                                                                                                                                            |
| <b>node-oriented tree</b>                    | A tree that is based on a detail structure, but the detail values are not used.                                                                                                                                                                                                                                                                                                   |
| <b>pagelet</b>                               | Each block of content on the home page 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.                                                                                                                       |
| <b>participant</b>                           | In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.                                                                                                                                                                                                                                                     |
| <b>participant object</b>                    | Each participant object may be related to one or more compensation objects.<br>See also <i>compensation object</i> .                                                                                                                                                                                                                                                              |
| <b>partner</b>                               | A company that supplies products or services that are resold or purchased by the enterprise.                                                                                                                                                                                                                                                                                      |
| <b>pay cycle</b>                             | In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.                                                                                                                                                                                                                                                |
| <b>payment shuffle</b>                       | In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.                                                                                                                            |
| <b>pending item</b>                          | In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.                                                                                                                                                                                                |
| <b>PeopleCode</b>                            | PeopleCode is a proprietary language, executed by the PeopleSoft component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.                                                                  |
| <b>PeopleCode event</b>                      | See <i>event</i> .                                                                                                                                                                                                                                                                                                                                                                |
| <b>PeopleSoft Pure Internet Architecture</b> | The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.                                                                                                                                                                               |
| <b>performance measurement</b>               | 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.                                     |
| <b>period context</b>                        | 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. |
| <b>person of interest</b>                    | A person about whom the organization maintains information but who is not part of the workforce.                                                                                                                                                                                                                                                                                  |
| <b>personal portfolio</b>                    | In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.                                                                                                                                                                                                           |
| <b>plan</b>                                  | 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.                                                                                                                                                   |

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| <b>plan context</b>         | 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. |
| <b>plan template</b>        | 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.                                                                                                                                                                                                                                                                                                              |
| <b>planned learning</b>     | In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>planning instance</b>    | In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>population</b>           | In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it.<br><br>See also <i>division</i> and <i>cohort</i> .                                                                                                                                                                                                                                                      |
| <b>portal registry</b>      | In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.                                                                                                                                                                                                                                                                     |
| <b>price list</b>           | In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.                                                                                                                                                                                              |
| <b>price rule</b>           | In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>price rule condition</b> | In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>price rule key</b>       | In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>primacy number</b>       | In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.                        |
| <b>primary name type</b>    | In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.                                                                                                                                                                                                                                                                                                                                                                                                                    |

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| <b>process category</b>    | In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.                                                                                                                                                                                                                                                                                                                     |
| <b>process group</b>       | In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.                                                                                                                                                                                                                                                       |
| <b>process definition</b>  | Process definitions define each run request.                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>process instance</b>    | 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.                                                                                                                                                                                                                                                    |
| <b>process job</b>         | 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.                                                                                                                                                                                                                            |
| <b>process request</b>     | A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.                                                                                                                                                                                                                                                  |
| <b>process run control</b> | 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.                                                                                            |
| <b>product</b>             | A PeopleSoft or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products are displayed with the product name and release number.                                                    |
| <b>product category</b>    | 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.                                                                                                                                                                            |
| <b>product family</b>      | A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified PeopleSoft partners.                                                                                                                                                               |
| <b>product line</b>        | The name of a PeopleSoft product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.                                                                                                                                                                                                                                   |
| <b>programs</b>            | In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.                                                                                                                                                             |
| <b>progress log</b>        | In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project. |
| <b>project transaction</b> | In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.                                                                                                                                                                                                                                                                                                 |
| <b>promotion</b>           | In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.                                                                                                                                                                                                                                                    |

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| <b>prospects</b>              | <p>In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution.</p> <p>In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>publishing</b>             | In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>rating components</b>      | In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>record group</b>           | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>record input VAT flag</b>  | 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. |
| <b>record output VAT flag</b> | <p>Abbreviation for <i>record output value-added tax flag</i>.</p> <p>See <i>record input VAT flag</i>.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>recname</b>                | The name of a record that is used to determine the associated field to match a value or set of values.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>recognition</b>            | In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.                                                                                                                                                                                                                                                                                                                               |
| <b>reference data</b>         | In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>reference object</b>       | 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).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>reference transaction</b>  | In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.                                                                                                  |
| <b>regional sourcing</b>      | In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

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| <b>relationship object</b>     | In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.                                                                                                                                                          |
| <b>remote data source data</b> | Data that is extracted from a separate database and migrated into the local database.                                                                                                                                                                                                                                                                                 |
| <b>REN server</b>              | Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.                                                                                                                                                                                                                                                                     |
| <b>requester</b>               | In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.                                                                                                                                                                                                        |
| <b>reversal indicator</b>      | In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.                                                                                                                                                                                                              |
| <b>role</b>                    | 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.                                                                                                                                            |
| <b>role user</b>               | 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. |
| <b>roll up</b>                 | In a tree, to roll up is to total sums based on the information hierarchy.                                                                                                                                                                                                                                                                                            |
| <b>run control</b>             | 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.                                                                                                                                                                             |
| <b>run control ID</b>          | A unique ID to associate each user with his or her own run control table entries.                                                                                                                                                                                                                                                                                     |
| <b>run-level context</b>       | 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.                                                 |
| <b>SCP SCBM XML message</b>    | Abbreviation for <i>Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message</i> . PeopleSoft EnterpriseOne Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.                                                                                                                              |
| <b>search query</b>            | 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.                                                                                                                                                                                          |
| <b>search/match</b>            | In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.                                                                                                                                                                    |
| <b>seasonal address</b>        | In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.                                                                                                                                                                                                           |
| <b>section</b>                 | 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.                                                                                                                                                |
| <b>security event</b>          | In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.                                                                                                                                                                             |
| <b>serial genealogy</b>        | In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.                                                                                                                                                                                                                                                              |

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| <b>serial in production</b>    | In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>service impact</b>          | In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>service indicator</b>       | In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>session</b>                 | <p>In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry. It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.</p> <p>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.</p> |
| <b>session template</b>        | In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.                                                                                                                                                                                                                                                                                                                                      |
| <b>setup relationship</b>      | In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>share driver expression</b> | In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>single signon</b>           | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>source key process</b>      | In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>source transaction</b>      | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>speed key</b>               | See <i>communication key</i> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>SpeedChart</b>              | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |

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| <b>SpeedType</b>             | A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.                                                                                                                                                                                                                                                                                                                                                                               |
| <b>staging</b>               | A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>standard letter code</b>  | In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.                                                                                                                                                                                                                                                                   |
| <b>statutory account</b>     | Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.                                                                                                                                                                                                                                                                                                                                 |
| <b>step</b>                  | In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.                                                                                                                                                                                                                                                                                                                                                                              |
| <b>storage level</b>         | In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.                                                                                                                                                                                                                                                                                       |
| <b>subcustomer qualifier</b> | A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Summary ChartField</b>    | 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).                                                                                                                                                                      |
| <b>summary ledger</b>        | 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. |
| <b>summary time period</b>   | In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.                                                                                                                                                                                                                                                                                   |
| <b>summary tree</b>          | 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.                                                                                                                                                 |
| <b>syndicate</b>             | To distribute a production version of the enterprise catalog to partners.                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>system function</b>       | In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>TableSet</b>              | A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.                                                                                                                                                                                                                                                                                                                                                       |
| <b>TableSet sharing</b>      | Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.                                                                                                                                                                                                                                                                                                                        |
| <b>target currency</b>       | The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.                                                                                                                                                                                                                                                                                                                                                                                      |

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| <b>tax authority</b>          | In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.                                                                                                                                                                                                                                                                                                         |
| <b>template</b>               | 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.                                                                                                      |
| <b>territory</b>              | In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.                                                                                                                                                                                                                                                                                                                         |
| <b>third party</b>            | A company or vendor that has extensive PeopleSoft product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft applications.                                                                                                                                                                                                                                                                                                            |
| <b>3C engine</b>              | Abbreviation for <i>Communications, Checklists, and Comments engine</i> . In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes. |
| <b>3C group</b>               | Abbreviation for <i>Communications, Checklists, and Comments group</i> . In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.                                                                                                             |
| <b>TimeSpan</b>               | 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.                                                                                                                                                                                                   |
| <b>trace usage</b>            | In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.                                                                                                                                                                                                                                                                |
| <b>transaction allocation</b> | 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.                                                                                                                                                                                                           |
| <b>transaction state</b>      | 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.                                                                                                 |
| <b>Translate table</b>        | 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.                                                                                                                                                                                                                                                                                                                        |
| <b>tree</b>                   | 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.                                                                                                                                                                                                                                                           |
| <b>tuition lock</b>           | In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or <i>locked</i> ) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.                                                                                                                           |

|                                    |                                                                                                                                                                                                                                                                                                                                                                                                                  |
|------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>unclaimed transaction</b>       | 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.                                                                                         |
| <b>universal navigation header</b> | 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.                                                           |
| <b>update access</b>               | In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.<br><br>See also <i>inquiry access</i> .                                                                                                                                                                                                                                                      |
| <b>user interaction object</b>     | 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). |
| <b>variable</b>                    | 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.                                                                                            |
| <b>VAT exception</b>               | Abbreviation for <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This term refers to both VAT exoneration and VAT suspension.                                                                                                                                                                                                          |
| <b>VAT exempt</b>                  | Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.                                                                                                                                                  |
| <b>VAT exoneration</b>             | Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.                                                                                                                                                                                                                                        |
| <b>VAT suspension</b>              | Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.                                                                                                                                                                                                                                                                                |
| <b>warehouse</b>                   | A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.                                                                                                                                                                                                                                                                                                |
| <b>work order</b>                  | In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.                                                                                                   |
| <b>worker</b>                      | A person who is part of the workforce; an employee or a contingent worker.                                                                                                                                                                                                                                                                                                                                       |
| <b>workset</b>                     | A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.                                                                                                                                                                                          |
| <b>worksheet</b>                   | 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.                                                                                                                                                                                                                      |
| <b>worklist</b>                    | 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.                                                                                                                                                                                                           |

|                           |                                                                                                                                                                                                                                                                                                                                                     |
|---------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>XML link</b>           | The XML Linking language enables you to insert elements into XML documents to create a links between resources.                                                                                                                                                                                                                                     |
| <b>XML schema</b>         | An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.                                                                                                                                                                                                                       |
| <b>XPI</b>                | Abbreviation for <i>eXtended Process Integrator</i> . PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with EnterpriseOne applications.                                                                                                                                                         |
| <b>yield by operation</b> | In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.                                                                                                                                                                                                                                |
| <b>zero-rated VAT</b>     | Abbreviation for <i>zero-rated value-added tax</i> . 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. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery. |

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