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PeopleSoft

PeopleSoft HCM 9.2: Human Resources Track Flexible Service

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PeopleSoft HCM 9.2: Human Resources Track Flexible Service
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Contents

Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft Applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

PeopleSoft Hosted Online Help

You access the PeopleSoft Online Help on Oracle's PeopleSoft Hosted Online Help website, which enables you to access the full help website and context-sensitive help directly from an Oracle hosted server. The hosted online help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support, because that documentation is now incorporated into the hosted website content. The Hosted Online Help website is available in English only.

Note: Only the most current release of hosted online help is updated regularly. After a new release is posted, previous releases remain available but are no longer updated.

Locally Installed Help

If you are setting up an on-premises PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the Hosted Online Help website, you can install the PeopleSoft Online Help locally. If you install the help locally, you have more control over which documents users can access and you can include links to your organization's custom documentation on help pages.

In addition, if you locally install the PeopleSoft Online Help, you can use any search engine for full-text searching. Your installation documentation includes instructions about how to set up Elasticsearch for full-text searching. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help." If you do not use Elasticsearch, see the documentation for your chosen search engine.

Note: See Oracle Support Document 2205540.2 (PeopleTools Elasticsearch Home Page) for more information on using Elasticsearch with PeopleSoft.

Note: Before users can access the search engine on a locally installed help website, you must enable the Search field. For instructions, go to your locally installed PeopleSoft Online Help site and select About This Help >Managing Locally Installed PeopleSoft Online Help >Enabling the Search Button and Field in the Contents sidebar.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has

a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

• Application Fundamentals

• Using PeopleSoft Applications

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft Applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

Typographical Convention	*Description*
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.
. . . (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.

Typographical Convention	Description
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

Information that applies only to a specific 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 region-specific heading: "(Latin America) Setting Up Depreciation"

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

• 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 the PeopleSoft Online Help:

- USF (U.S. Federal)

- E&G (Education and Government)

Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

Using and Managing the PeopleSoft Online Help

Click the Help link in the universal navigation header of any page in the PeopleSoft Online Help to see information on the following topics:

- What's new in the PeopleSoft Online Help.

- PeopleSoft Online Help accessibility.

- Accessing, navigating, and searching the PeopleSoft Online Help.

- Managing a locally installed PeopleSoft Online Help website.

Related Links for PeopleSoft HCM

PeopleSoft Information Portal

My Oracle Support

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

PeopleSoft Business Process Maps (Microsoft Visio format)

Contact Us

Send your suggestions to PSOFT-INFODEV_US@ORACLE.COM. Please include release numbers for the PeopleTools and applications that you are using.

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Chapter 1

Getting Started with Track Flexible Service

Track Flexible Service Overview

Track Flexible Service enables you to set up your service tracking structure to comply with internal and external regulations, like these:

- Most organizations have requirements, based on internal procedures and bargaining agreements, that define different types of service and different service accrual rules for different types of eligibility.

- Some organizations have requirements that are mandated by local or federal legislation. For example, the Family and Medical Leave Act defines the service date calculation method for compliance with the plan, and the state of Massachusetts includes all periods of service in accrual toward seniority, regardless of breaks.

Track Flexible Service also enables you to set up a service tracking structure based on how your organization does business.

You can define service parameters and service accrual rules, use these parameters and rules to establish service types, and then organize the service types into calculation groups. You can track worker service credits by job or position, stagger service type start dates, prorate service credits based on your full-time equivalent count, and prorate service credits based on job action or reasons.

Track Flexible Service Business Processes

Track Flexible Service provides these business processes:

- Track tenure.

- Track flexible service.

This documentation discusses these business processes in the business process.

Track Flexible Service Integrations

Track Flexible Service integrates with these PeopleSoft applications:

- PeopleSoft HCM applications.

- Other PeopleSoft applications.

- Third-party applications.

This documentation discusses integration considerations in the implementation topics in Human Resources Track Flexible Service.

Supplemental information about third-party application integrations is located on My Oracle Support.

Related Links

"Identifying Integrations for Your Implementation" (PeopleSoft HCM 9.2: Application Fundamentals)

Track Flexible Service 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 documentation.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps.

Refer to the *PeopleSoft HCM 9.2 - Reorganization of Component Interface Permissions* (Doc ID 2342162.1) MOS posting for a list of system-delivered CIs and their usage, the mapping of CIs and associated permission lists, and the mapping of CI permission lists and user roles.

See *PeopleTools: Setup Manager*

Chapter 2

Setting Up Track Flexible Service

Understanding Track Flexible Service

The Track Flexible Service business process in HR enables you to track and calculate worker service based on how your organization operates.

First, you set up various service parameters. Next, you define a complex set of the service accrual rules. These rules form the basis for flexible service accrual processing. Then, you associate the service accrual rules with service types, which in turn, are associated with calculation groups. Finally, you assign calculation groups to workers based on either position or job code.

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), Application Trace (EG_APPLICATN_TRACE), and Database Alias (EG_DB_ALIAS) components.

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

- Configure the system to use a certain number of days per month or to use the calendar month.

- Define the database alias (EVENT_DT) to define the reference to job history.

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

Related Links
"Setting Up Service Parameters" (PeopleSoft HCM 9.2: Human Resources Track Faculty Events)

Setting Up Service Accrual Rules

To set up service accrual rules, use the Calendar (EG_DB_ALIAS), HR Action/Category (EG_ACTION_CATEGORY), Service Rules (EG_SERVICE_ELAPSED), and Calculation Group (EG_CALC_GROUPS) components.

Methods of calculating and tracking worker service vary among different groups at the same organization and from one organization to the next. Using the Service Accrual Control tables, you can establish the service accrual rules that best fit your organization.

You can:

- Define service calendars.

- Establish HR action/categories to categorize the job action and job reason codes that count toward service accrual.

- Define date-rounding options.

Service rules are grouped together under a definition name (to provide flexibility when you are determining calculation rules for different types of service accrual processing) and then assigned to a service type. The system processes service types based on the service rules that are defined within the definition name.

Service types belong to a calculation group. One or more service types can belong to a calculation group. Calculation groups enable you to group workers who have the same calculation rules applied to their service accrual process.

Related Links
"Setting Up Service Accrual Control Tables" (PeopleSoft HCM 9.2: Human Resources Track Faculty Events)

Setting Up Flexible Service Tracking Defaults

To set up flexible service tracking defaults, use the Position Data (POSITION_DATA) and Job Code Table (JOB_CODE_TBL) components.

This section discusses how to:

- Set up the Position Data table.

- Set up the Job Code table.

Note: To accrue service credits, a worker must be assigned to a calculation group. You can set defaults on the Position Data table and the Job Code table to associate a position, a job code, or both with a calculation group.

Setting Up the Position Data Table

If you are using the Manage Positions business process in PeopleSoft HR, you can assign a default calculation group using the Position Data table.

The Manage Positions business process is used mostly by organizations that rarely change their structure or position definitions. The Manage Positions business process enables you to create position numbers (established in the Position Data Table) that define specific information about a given position.

When you hire a new worker, you can specify the code for the job position. All of the information that is defined for the position in the Position Data Table, including the service calculation group, automatically populates the worker's employment record.

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

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

Related Links

"Maintaining Position Data" (PeopleSoft HCM 9.2: Human Resources Manage Positions)

Setting Up the Job Code Table

You can also assign a default calculation group using the Job Code table.

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

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

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

Related Links

"Classifying Jobs" (PeopleSoft HCM 9.2: Application Fundamentals)
"Setting Up Service Accrual Control Tables" (PeopleSoft HCM 9.2: Human Resources Track Faculty Events)

Chapter 3

Assigning a Worker to a Calculation Group

Understanding Calculation Groups

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

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

When you use the Track Flexible Service business process in HR to assign a worker to a calculation group, you must:

- Establish the calculation group to which the worker belongs.

- Establish whether the worker has previous startup credits.

- Establish any exceptions that the worker might have based on the calculation group to which the worker belongs.

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

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

Selecting a Calculation Group

To select a calculation group, use the Position Data (POSITION_DATA) and Job Code Table (JOB_CODE_TBL) components.

To include a worker in the flexible service accrual process:

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

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

   Defaults for the calculation group come from the following sources:

   a. Position Data component, if present.

   b. Job Code Table component, if present.

   c. User entry.

2. In the FTE for Flex Service Accrual field, enter the FTE value to be used in prorating the worker's accrued service.

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

Related Links

"Defining Personnel Actions and Reasons" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)

"Creating Positions" (PeopleSoft HCM 9.2: Human Resources Manage Positions)

"Classifying Jobs" (PeopleSoft HCM 9.2: Application Fundamentals)

"Setting Up Service Accrual Control Tables" (PeopleSoft HCM 9.2: Human Resources Track Faculty Events)

Running the Employee Service Report

This section discusses how to run the Employee Service Report.

Page Used to Run the Employee Service Report

Page Name	Definition Name	Usage
Employee Service Report Page	RUNCTL_EGPP04	Run the Employee Service Report (PER048). The report lists workers by calculation group and service type and within specified time periods. Sort by ascending or descending service time.

Entering Startup Credits and Exceptions

This section provides an overview of startup credits and exceptions and discusses how to enter a worker's startup credits and exceptions.

Page Used to Enter Startup Credits and Exceptions

Page Name	Definition Name	Usage
Flexible Service Page	EG_FLX_SVC_DT	Enter a worker's startup credits and exceptions.

Understanding Startup Credits and Exceptions

Enter worker information on the Flexible Service page if any of the following statements are true:

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

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

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

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

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

  To exclude the service type from accruing credits for the worker, enter the service type and select Override Calc (override calculation).

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

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

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

Flexible Service Page

Use the Flexible Service page (EG_FLX_SVC_DT) to enter a worker's startup credits and exceptions.

Navigation

Workforce Administration > Flexible Service EG > Flexible Service > Flexible Service

Image: Flexible Service page

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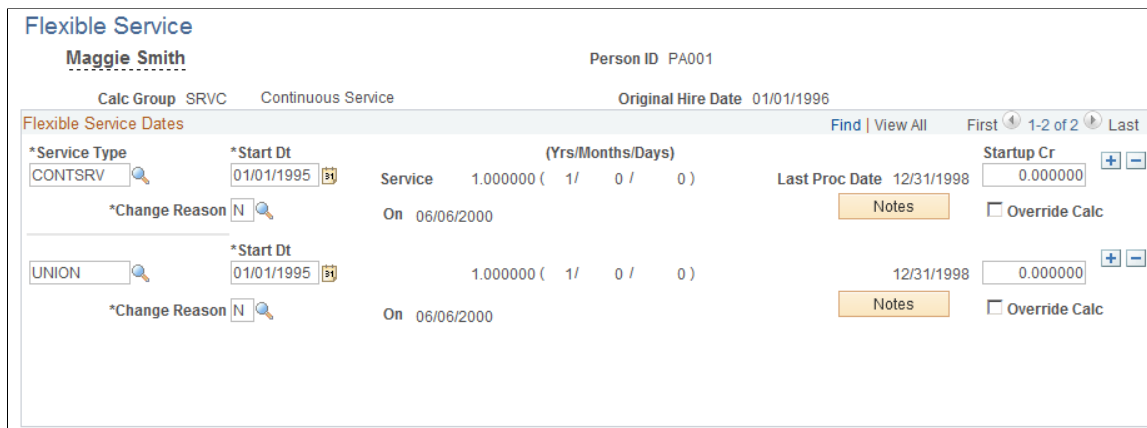
Service Type	Select the service type. Only service types that are valid for the selected calculation group appear.
Start Date	Enter the date on which you want credits to begin accruing for this service type.
	Each service type can have a different start date. However, these dates must fall within the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

Override Calc (override calculation)	Select to *exclude* the service type from the service accrual process for the worker. Deselect to include the service type in the service accrual process for the worker.
Change Reason	Change the start date for the service type, or enter a startup credit, and then record the reason for any changes that you made. Select one of the following values: *Retroactive Adjustment, Error Corrections, Partial Month, New, Other, Service Recalc. Pending, Recalculation.* You can add values in the translate table.

Reviewing Related Jobs for Flexible Service

This section discusses how to review flexible service credits.

Page Used to Review Related Jobs for Flexible Service

Page Name	*Definition Name*	*Usage*
View Related Jobs Page	EG_FLX_JOBS	Review jobs and positions that the worker holds that are eligible to accrue flexible service credits.

View Related Jobs Page

Use the View Related Jobs page (EG_FLX_JOBS) to review jobs and positions that the worker holds that are eligible to accrue flexible service credits.

Navigation

Workforce Administration > Flexible Service EG > View Related Jobs > View Related Jobs

Image: View Related Jobs page

This example illustrates the fields and controls on the View Related Jobs page. You can find definitions for the fields and controls later on this page.

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

Original Hire Date	Displays the worker's hire date.

Jobs Counted for Flexible Service

Empl Rcd# (employee record number)	Displays the worker's employment record number.
Service Calc Group (service calculation group)	Displays the service calculation group to which the worker belongs within the job or position.
FTE For Accrual	Displays the worker's FTE value. A worker working 80 percent of a normal full-time schedule has an FTE of *.80.* The FTE for Accrual value is maintained on the Employment Information page.

Chapter 4

Calculating Flexible Service and Viewing Results

Understanding Calculating Flexible Service

This section discusses:

- Service Calculation process.

- Processing modes.

Service Calculation Process

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

Calculating flexible service is a two-step process:

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

   You can calculate service credits for:

   - A specified calculation group or an individual worker.

   - All service types within the calculation group or just one service type.

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

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

     ---

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

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

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Related Links

"Running the Tenure Calculation Process" (PeopleSoft HCM 9.2: Human Resources Track Faculty Events)
"Viewing and Modifying Survey Results" (PeopleSoft HCM 9.2: Human Resources Track Faculty Events)

Processing Modes

Before you run flexible service calculations, you should understand these three processing modes, how these modes differ, and when to use each one:

- Normal Run.

- Update to History.

- Delete_Rebuild History.

Normal Run

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

Normal Run mode doesn't affect a worker's existing service history data. View the temporary data using the Flexible Service Summary page, or print the Calculated Service Report for a listing of the service calculations. You typically create the temporary file from Normal Run mode for a specified period of time, and then commit this data to history by running the process in Update to History mode for the same period.

Note: To process a single worker, you should run the process in Normal Run mode for that worker only and then run the process in Update to History mode for all workers within a calculation group at the same time.

Update to History

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

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

Delete_Rebuild History

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

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

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

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

Note: Delete_Rebuild History mode does not re-accrue manual adjustments that were entered on the Service History page. You must reenter these adjustments after the data is committed to history again. However, the system will recalculate all startup credits.
If you want to set up your run control page but you don't want to run the process until later, select the *[none]* value to save the run control page.

Running the Flexible Service Calculation Process

This section provides an overview of the calculation process and discusses how to specify time periods and calculation groups for processing.

Page Used to Run the Flexible Service Calculation Process

Page Name	Definition Name	Usage
Calculate Service Page	RUNCTL_EGPP02	Specify time periods and calculation groups.

Understanding the Calculation Process

This section discusses:

- Use the service calculation process.

- Determine an Worker's Eligibility for a Flexible Service Type.

- Run a Service Calculation.

- Update Flexible Service detail and history.

Use the Service Calculation Process

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

Suppose your organization has set up a calculation group called *CLER* (clerical workers). This group includes three service types: *UNION, AWARD5* (five-year service award), and *SENIORITY.* When you run the flexible service accrual process for this calculation group, each worker who is assigned to the calculation group—who doesn't have exceptions listed on the Flexible Service page—accrues service for all three types, beginning at the from date established on the run control page.

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

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

Determine an Worker's Eligibility for a Flexible Service Type

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

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

Run a Service Calculation

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

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

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

2. After the accrual process runs for a flexible service type for a worker, the system performs Proration by FTE process on the calculated service if prompted to do so by the proration limits established on the Service Definition page.

3. The system writes the service history to a temporary flexible service history file based on the calendar periods that you set up on the Calendar page.

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

See "Setting Up Service Accrual Control Tables" (PeopleSoft HCM 9.2: Human Resources Track Faculty Events).

Update Flexible Service Detail and History

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

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

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

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

Calculate Service Page

Use the Calculate Service page (RUNCTL_EGPP02) to specify time periods and calculation groups.

Navigation

Workforce Administration > Flexible Service EG > Calculate Service > Calculate Service

Image: Calculate Service page

This example illustrates the fields and controls on the Calculate Service page. You can find definitions for the fields and controls later on this page.

Run	Click this button to calculate time periods and calculation groups.
From Date and**To Date**	Enter the time period for the calculation. These dates *must* match a computational period of the calendar that is used by the

calculation group that you are processing. The from date must match a period begin date in the calendar, and the to date must match a period end date.

For example, you might want to calculate tenure for an academic year that consists of two computational periods, January 1, 2008 to June 30, 2008, and July 1, 2008 to December 31, 2008. Therefore, enter *01/01/08* as the from date and*12/31/08* as the to date. The process creates a service history for each computational period.

Calculation Name	This field is automatically populated from the run control ID that you entered. It is used internally by the background process.
Calc all Service Types (calculate all service types)	Select to accrue credits for all service types within the calculation group that is being processed.
Service Type	Select the service type for which you want to accrue service credits. This field is unavailable if you selected the Calc All Service Types check box.

Service Date Processing Type

Periodic Processing Mode - EG	Select the mode that you want to use: *Delete & Rebuild History:* This mode deletes the worker's service history and rebuilds it. Use this to regenerate service for an individual worker (or all workers) within a calculation group. When you select this value, the system selects theDelete & Reload History check box. **_Warning!_** This mode removes *all* service history that is based on the calculation group or worker that you specified. *Normal Run:* When you select this value, the system selects theDelete old Calc Results (delete old calculation results) check box. *Update to History:* When you select this value, the system selects theCommit to History check box.

People Tools: Process Scheduler

Viewing Flexible Service Calculation Results

This section discusses how to view flexible service calculation results.

Pages Used to View Flexible Service Calculation Results

Page Name	Definition Name	Usage
Flexible Service Summary Page	EG_CLC_FLX_SUM	Review normal run results.
Service History Page	EG_SVC_HIST_FLX	View service history information.
Flexible Service Page	EG_FLX_SVC_DT	View service detail information.

Reviewing the Message Log

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

Related Links

"Running the Tenure Calculation Process" (PeopleSoft HCM 9.2: Human Resources Track Faculty Events)

Flexible Service Summary Page

Use the Flexible Service Summary page (EG_CLC_FLX_SUM) to review normal run results.

Navigation

Workforce Administration > Flexible Service EG > Flexible Service Summary > Flexible Service Summary

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

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

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

Service Adjustment	Displays the adjustment amount that you entered on the Service History page.
Accrued Service	Displays the total amount of accrued service.
Accum Breaks (accumulated breaks)	Displays the total amount of breaks in service.
Action	Displays the job action code that contributed to the service accrual for the calendar period.
Reason	Displays the reason code that is associated with this job action that counts toward accrued service.
Total (#yrs/mths/days) (total number of years, months, and days)	Displays the total years, months, and days of accrued service that was earned.
Breaks	Displays the amount of breaks in service.

Service History Page

Use the Service History page (EG_SVC_HIST_FLX) to view service history information.

Navigation

Workforce Administration > Flexible Service EG > Service History > Service History

Image: Service History page

This example illustrates the fields and controls on the Service History page. You can find definitions for the fields and controls later on this page.

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

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

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

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

Flexible Service Page

Use the Flexible Service page (EG_FLX_SVC_DT) to view service detail information.

Navigation

Workforce Administration > Flexible Service EG > Flexible Service > Flexible Service

View the total accrued service credits after running the flexible service calculation process in Update to History mode. Use this page to establish startup credits for a worker and record worker exceptions to service accrual.

Note: Remember that values appear in the display fields only *after* the process has been initially run and service history exists. To view details of a worker's service history, use the Service History page.

Running the Service Calculation Report

This section discusses the page that is used to run the Service Calculation report.

Page Used to Run the Service Calculation Report

Page Name	*Definition Name*	*Usage*
Calculated Service Report Page	RUNCTL_EGPP05	Run the Service Calculation report (PER049). This report lists the results of the Normal Run background process and includes all workers who have a temporary file (resulting from a process in Normal Run mode) that contains details about their accrued service credits.