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PeopleSoft

PeopleSoft HCM 9.2: PeopleSoft Human Resources Track Faculty Events

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Contents

Preface: Preface ..... **vii**
Understanding the PeopleSoft Online Help and PeopleBooks vii
Hosted PeopleSoft Online Help vii
Locally Installed PeopleSoft Online Help vii
Downloadable PeopleBook PDF Files vii
Common Help Documentation vii
Field and Control Definitions viii
Typographical Conventions viii
ISO Country and Currency Codes ix
Region and Industry Identifiers ix
Translations and Embedded Help x
Using and Managing the PeopleSoft Online Help x
PeopleSoft HCM Related Links x
Contact Us x
Follow Us xi
Chapter 1: Getting Started with Track Faculty Events **13**
Track Faculty Events Overview 13
Track Faculty Events Implementation 13
Chapter 2: Understanding Track Faculty Events **15**
Track Faculty Events Business Process 15
Tracking Tenure 15
Tracking Events 15
Managing Cases 16
(CAN) Submitting Statistics for the Your Canada Academic Teaching Surveys 16
(AUS) Reporting DETYA for the Australian Higher Education Sector 16
Chapter 3: Setting Up Track Faculty Tenure **17**
Understanding Service Parameters and Accrual Control Tables 17
Common Element Used in Service Parameters and Accrual Control Tables 17
Understanding Tracking Accrued Service 17
Understanding Service Rules 18
Setting Up Service Parameters 21
Pages Used to Set Up Service Parameters 22
Calculation Option Page 22
Conversion Options Page 24
Flexible Service Date Round Page 25
Service Rules Date Conversion Page 28
Flexible Service DB Alias Page 29
Flexible Service Trace Setting Page 30
Setting Up Service Accrual Control Tables 31
Pages Used to Set Up Service Accrual Control Tables 31
Understanding Service Accrual Tables 32
Calendar Page 33
Group HR Action/Category Page 35
Service Definition Page 36
Service Include Category Page 39
Service Add Periods Rules Page 41

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Service Adj Future Page.... 43
Service Final Handling Page....46
Min/Max Service Rules Page....47
Faculty Calculation Group Page.... 48
Setting Up Tenure Tracking....51
Pages Used to Set Up Tenure Tracking....51
Academic Rank Page.... 52
Experience/Credit Codes Setup Page....53
Assigning an Employee to Tenure.... 54
Pages Used to Assign an Employee to Tenure....54
Understanding Employee Tenure.... 55
Activating Tenure Accrual.... 55
Tenure Data Page.... 56
Prior Experience/Credits Page....59
Review Rank/Status History Page.... 60
Review Current Jobs for Tenure Page.... 62
Running the Tenure Calculation Process....63
Pages Used to Run the Tenure Calculation Process.... 63
Understanding the Tenure Calculation Process.... 64
Perform Tenure Calculations Page....66
Message Log Page....68
View Flexible Periodic Results Page or Review Tenure Run Results.... 70
Tenure Calculation Summary Page.... 71
Service History Page.... 72
Chapter 4: Tracking Events....75
Tracking Faculty Events.... 75
Pages Used to Track Faculty Events.... 75
Common Elements Used to Track Faculty Events.... 75
Activities Page....76
Faculty Administrative Posts Page.... 77
Track Administrative Posts Page.... 77
Faculty Presentations Page....78
Faculty Publications Page.... 79
Student Advisement Activity Page.... 80
Track Teaching Responsibility Page.... 80
Tracking Committee Information.... 81
Pages Used to Track Committee Information....81
Faculty-Committee Type Page.... 82
Committee Page....83
Committee Members Page.... 84
Review Committee Membership Page....84
Chapter 5: Managing Cases....87
Defining and Reviewing Employee Cases.... 87
Pages Used to Define and Review Employee Cases.... 87
Common Elements Used to Define and Review Employee Cases....88
Faculty Employee Case Page....88
Faculty Case Information Page....89
Faculty Case Progress Page.... 91
Review Approved Cases Page.... 92
Faculty Events History Report Page....93

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Chapter 6: (CAN) Working with the University and College Academic Staff System (UCASS) Survey Process..... 95
Understanding the University and College Academic Staff System (UCASS) Survey Business Process..... 95
Setting Up PeopleSoft HCM Control Tables..... 95
Setting Up Track Faculty Events Tables..... 96
Setting Up the University and College Academic Staff System (UCASS) Survey Business Process..... 96
Pages Used to Set Up the Canadian Teaching Surveys Business Process..... 96
Principal Subjects Taught CAN Page..... 97
Stats-CAN Dept CIP Page..... 98
Faculty Code Stats CAN Page..... 98
Non-Operational Fund Table Page..... 99
Reporting Period Stats CAN Page..... 100
Loading and Modifying Data in the FT Academic Teaching Member Table..... 101
Pages Used to Load and Modify Data in the FT Academic Teaching Member Table..... 101
Understanding the Load FT Teaching Member Data Process..... 102
Load FT Teaching Member Data Page..... 102
Full-Time Member Page..... 103
Loading Data Into the Academic Teaching Survey Tables..... 105
Pages Used to Load Data Into the Academic Teaching Survey Tables..... 105
Understanding the Load Teaching Survey Data Process..... 105
Common Elements Used in the Load Teaching Survey Data Process..... 106
FT Survey Page..... 107
Viewing and Modifying Survey Results..... 108
Pages Used to View and Modify Academic Teaching Survey Results..... 108
Common Elements Used to View and Modify Academic Teaching Survey Results..... 108
FT Survey Part 1 Page..... 109
FT Survey Part 2 Page..... 110
PT Survey Part 1 Page..... 113
PT Survey Part 2 Page..... 113
Creating the Survey Report Flat Files..... 115
Pages Used to Create the Survey Report Flat Files..... 115
Common Elements Used to Create the Survey Report Flat Files..... 116
FT Report File Page..... 116
PT Report File Page..... 116
Verifying Survey Results with Statistics Canada..... 117
Page Used to Verify Survey Results..... 117
FT Survey Stats CAN Rpt Page..... 117
Chapter 7: (AUS) Reporting DETYA for the Australian Higher Education Sector..... 119
Understanding DETYA Reporting..... 119
Understanding DETYA Calculations and Reference Dates..... 119
Setting Up DETYA Reporting Codes..... 120
Pages Used to Set Up DETYA Reporting Codes..... 120
Classification Codes AUS Page..... 121
Organization Unit AUS Page..... 121
Generating DETYA Reports Data..... 122
Pages Used to Generate DETYA Reports..... 122

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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.

Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the Oracle Help Center. The hosted PeopleSoft 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. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see Configuring Context-Sensitive Help Using the Hosted Online Help Website.

Locally Installed PeopleSoft Online Help

If you're setting up an on-premises PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. Installable PeopleSoft Online Help is made available with selected PeopleSoft Update Images and with PeopleTools releases for on-premises installations, through the Oracle Software Delivery Cloud.

Your installation documentation includes a chapter with instructions for how to install the online help for your business environment, and the documentation zip file may contain a README.txt file with additional installation instructions. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help."

To configure the context-sensitive help for your PeopleSoft applications to use a locally installed online help website, see Configuring Context-Sensitive Help Using a Locally Installed Online Help Website.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the Oracle Help Center. 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

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- 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.
& (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.

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Typographical Convention	*Description*
⇒	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)

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- 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

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help.
- Managing hosted Online Help.
- Managing locally installed PeopleSoft Online Help.

PeopleSoft HCM Related Links

Oracle Help Center

PeopleSoft Online Help Home

PeopleSoft Information Portal

My Oracle Support

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

PeopleSoft Business Process Maps (Microsoft Visio format)

HCM Abbreviations

PeopleSoft Spotlight Series

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Please include the applications update image or PeopleTools release that you're using.

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Chapter 1

Getting Started with Track Faculty Events

Track Faculty Events Overview

The PeopleSoft HR: 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 product documentation.

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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.

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 the product documentation for *PeopleTools: Setup Manager* and Application Fundamentals

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Chapter 2

Understanding Track Faculty Events

Track Faculty Events Business Process

Track Faculty Events is a business process in HR that enables you to track tenure, faculty events, and to manage faculty cases and reporting requirements. This topic 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 topic 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.
- Presentations.
- Publications.
- Student advisement.
- Teaching responsibilities.

You can track additional information using the“Manage Profiles Business Processes” (PeopleSoft Human Resources Manage Profiles) business process. Information that can be tracked in profiles includes education (both school and professional training), honors and awards, licenses and certificates, memberships in professional organizations, and special projects.

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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 for the Your 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 an FT Academic Teaching Survey record for each employee who meets certain conditions for full time status. The Load Teaching Survey Data – PT Survey process creates a PT Academic Teaching Survey record for each employee who meets the conditions for part time status. To produce these reports, you must set up some additional HR control tables with Statistics Canada fields listed after each table.

Related Links

Understanding the University and College Academic Staff System (UCASS) Survey Business Process

(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.

Related Links

Understanding DETYA Reporting

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Chapter 3

Setting Up Track Faculty Tenure

Understanding Service Parameters and Accrual Control Tables

This topic discusses:

- Common elements.
- Tracking accrued service.
- Service rules.

Common Element Used in Service Parameters and Accrual Control Tables

Field or Control	*Description*
Calculation Name	Displays the name of the calculation process. This is the same as the run control ID. See Perform Tenure Calculations Page.

Understanding Tracking Accrued Service

The Track Faculty Events business process (FACULTY_EVENTS) in PeopleSoft HR 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.

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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, 2005 to December 31, 2005 and January 1, 2006 to May 31, 2006. Your rules specify that each semester counts as 0.50 years of service. You set up HR 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 HR action categories, using the Service Rules (EG_SERVICE_ELAPSED) component.

Suppose that an employee is hired on August 3, 2005. The employee begins a leave of absence on October 13, 2005 and returns to work on December 1, 2005. This table lists the employee's job history:

Action	***Effective Date***	***Adjusted Effective Date for Service***
Hire	08/03/2005	08/01/2005
Leave	10/13/2005	10/01/2005
Return	12/01/2005	12/01/2005

See “Viewing Worker Job History” (PeopleSoft Human Resources Administer Workforce).

For the semester August 8, 2005 to December 31, 2005 (08/01/2005 to 12/31/2005), the employee accrues service as follows:

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- 0.20 years for the period 08/01/2005 to 09/31/2005.
- 0.10 years for the period 12/01/2005 to 12/31/2005.

For the same semester, 0.20 years aren't counted toward accrual for the period 10/09/2005 to 11/30/2005.

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 2005/01/01 – 2003/08/01 = 0001/05/00, or 1 year, 5 months, and 0 days.

However, consider the subtraction 2005/11/01 – 2002/12/15. 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 2005/11/01 becomes 2005/10/32. 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 2005/22/32, and the equation is 2005/22/32 – 2003/12/15 = 0002/10/17 or 2 years, 10 months, and 17 days.

If you assume 30 days per month, 2005/11/01 becomes 2005/10/31. After you again convert 1 year to 12 months, you end up with 2005/22/31. The equation is 2005/22/31 – 2003/12/15 = 0002/10/16 or 2 years, 10 months, and 16 days.

Setting Decimal to Raw Date Conversion Option

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 instead of just months and days. This represents the number of whole months and days. For example, in the sample date 06/6/06, you're only six days

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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 01/01/06 becomes 2006.0000, 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 HR 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 2005/11/01 – 2002/12/15.

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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 2005/11/01 becomes 2005/10/32.
- 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 Flexible Service Duration (EG_DURATION_OPTS), Flexible Service Date Round (EG_DATE_ROUNDING), Service Rules Date Conversion (EG_DATE_CONVERSION), Flexible Service DB Alias (EG_DB_ALIAS), and Flexible Service Trace Setting (EG_APPLICATN_TRACE) components.

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Pages Used to Set Up Service Parameters

Page Name	*Definition Name*	*Usage*
Calculation Option Page	EG_AGECALC_PERIOD	Select a calculation method and set the parameters that are associated with that method.
Conversion Options Page	EG_AGECALC_PARMS	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.
Flexible Service Date Round Page	EG_DATE_ROUND	Set up date rounding rules.
Service Rules Date Conversion Page	EG_DATE_CONV	Set up a date conversion method.
Flexible Service DB Alias Page	EG_ALIAS_ENTRY	Set up an event date alias for referencing the **Effective Date** field on the Job table.
Flexible Service Trace Setting Page	EG_AUDIT_PNL	Turn on the application trace to provide a way to audit an application.

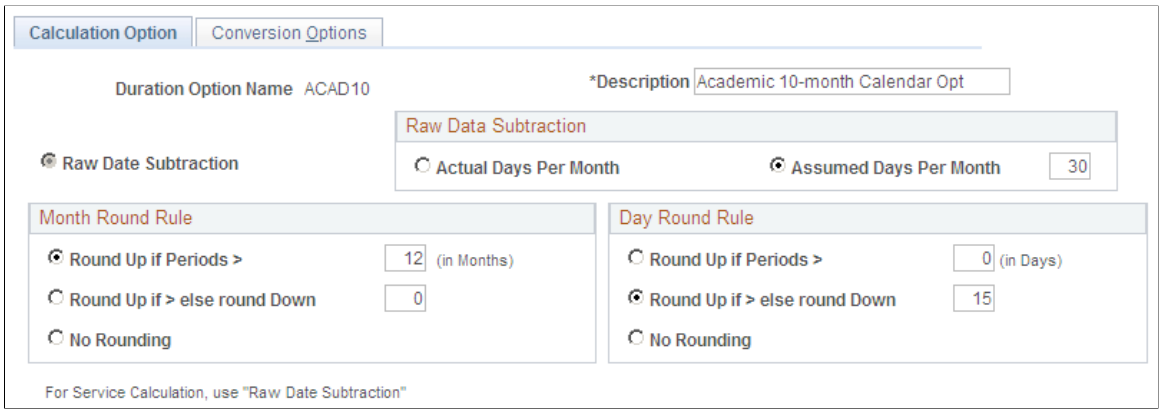
Calculation Option Page

Use the Calculation Option page (EG_AGECALC_PERIOD) to select a calculation method and set the parameters that are associated with that method.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Flexible Service EG** > **Service Rules** > **Flexible Service Duration** > **Calculation Option**

This example illustrates the fields and controls on the Calculation Option page.



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Field or Control	*Description*
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 Rule

Field or Control	*Description*
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 Rule

Field or Control	*Description*
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.

Related Links

Understanding Service Rules
Conversion Options Page

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Conversion Options Page

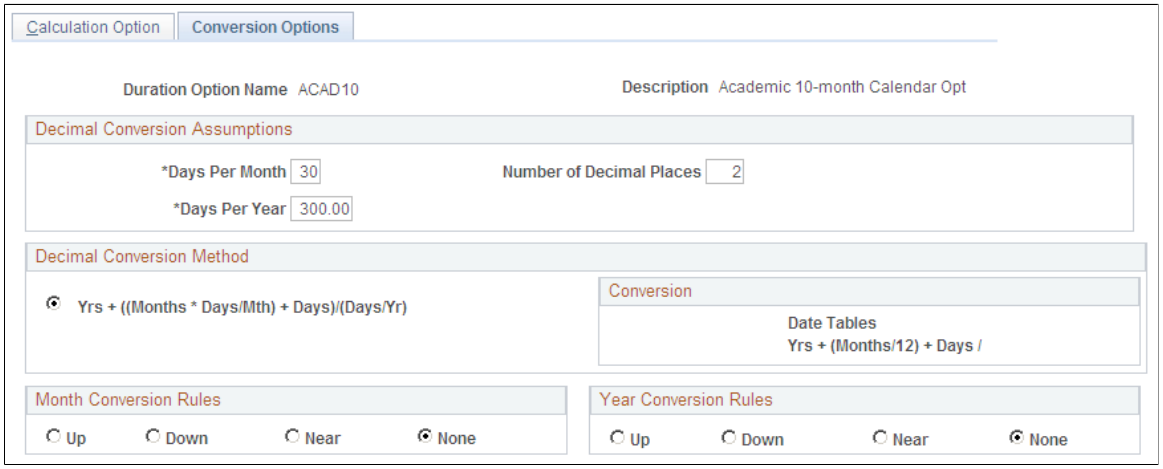
Use the Conversion Options page (EG_AGECALC_PARMS) to select a method for converting raw dates to decimal dates.

The flexible service and tenure service processes use the conversion method after performing the subtraction.

Navigation:

Set Up HCM > Product Related > Workforce Administration > Flexible Service EG > Service Rules > Flexible Service Duration > Conversion Options

This example illustrates the fields and controls on the Conversion Options page.



Decimal Conversion Assumptions

Field or Control	*Description*
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 background 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.

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Decimal Conversion Method

The system supports one decimal conversion formula:

The months times days divided by the month, then add the year and days. This value is divided by the product of days divided by the years.

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

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

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

Year Conversion Rules

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

Flexible Service Date Round Page

Use the Flexible Service Date Round page (EG_DATE_ROUND) to set up date rounding rules.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Flexible Service EG** > **Service Rules** > **Flexible Service Date Round** > **Flexible Service Date Round**

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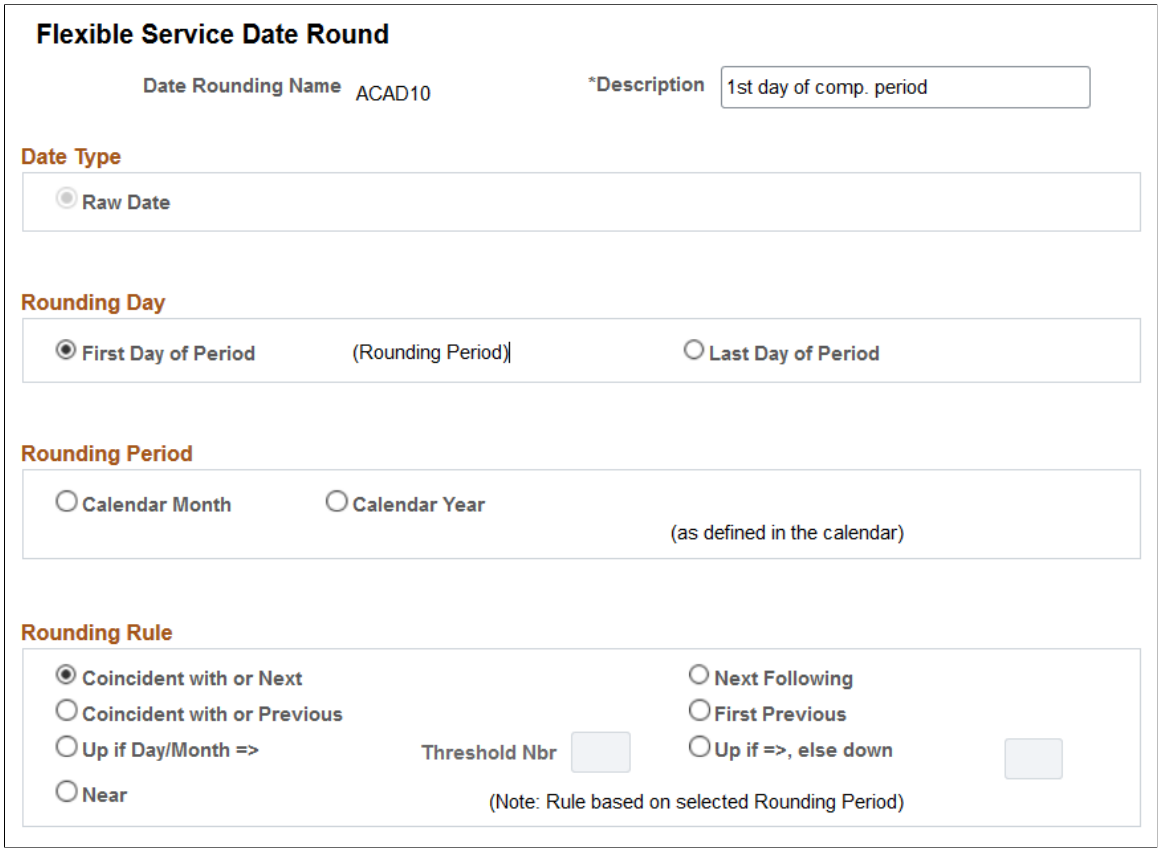
This example illustrates the fields and controls on the Flexible Service Date Round page.



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

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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	05/01/2005	05/01/2005
Coincident (with) or Next Following	05/02/2005	06/01/2005
Next Following	05/01/2005	06/01/2005
Coincident (with) or First Previous	05/01/2005	05/01/2005
First Previous	05/01/2005	04/01/2005
First Previous	05/02/2005	05/02/2005
Near	05/03/2005	05/01/2005

Threshold Rounding Rule	*Base Date*	*Threshold*	*Rounded Date*
Round Up if . . .	05/17/2005	15	06/01/2005
Round Up if . . . Else Down	05/17/2005	15	06/01/2005
Round Up if . . .	05/17/2005	20	05/17/2005
Round Up if . . . Else Round Down	05/17/2005	20	05/01/2005

Select a rounding rule from the following options:

Coincident or Next

Next

Coincident or Previous

Previous

Up if Day/Month =>

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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.

Related Links

Service Include Category Page

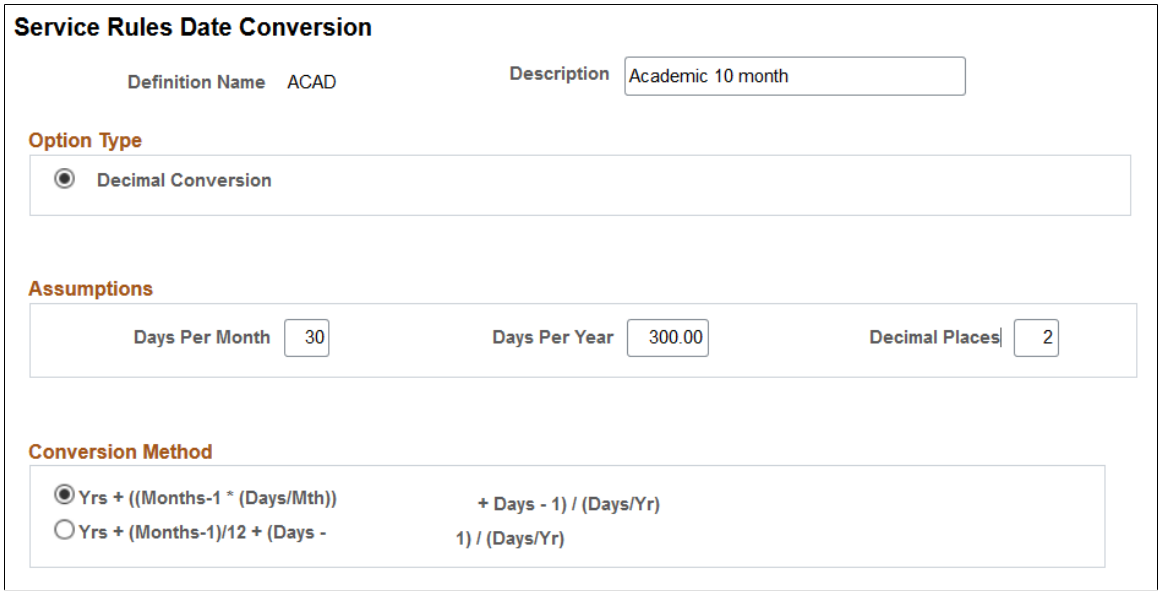
Service Rules Date Conversion Page

Use the Service Rules Date Conversion page (EG_DATE_CONV) to set up a date conversion method.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Flexible Service EG** > **Service Rules** > **Service Rules Date Conversion** > **Service Rules Date Conversion**

This example illustrates the fields and controls on the Service Rules 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.

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Assumptions

Field or Control	*Description*
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:

The days divided by the month then multiplied by one. This is subtracted from the months, then add the days minus ones. Then add the years. This value is divided by the product of days divided by the years.

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

The months minus one then add the years. This value is divided by the of days minus one. Then this value is divided by the product of days divided by the years.

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

Related Links

Understanding Service Rules

Flexible Service DB Alias Page

Use the Flexible Service DB Alias page (EG_ALIAS_ENTRY) to set up an event date alias for referencing the Effective Date field on the Job table.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Flexible Service EG** > **Service Variables** > **Flexible Service DB Alias** > **Flexible Service DB Alias**

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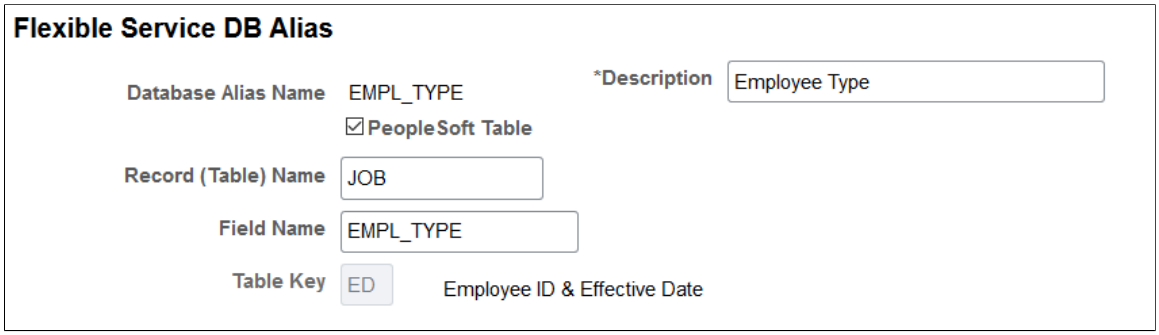
This example illustrates the fields and controls on the Flexible Service DB Alias page.



Field or Control	*Description*
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.

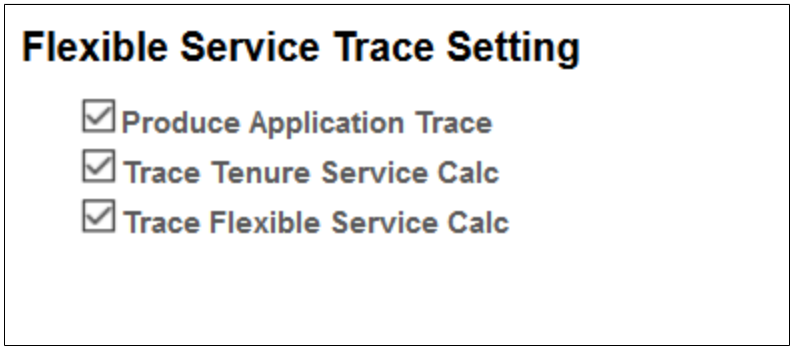
Flexible Service Trace Setting Page

Use the Flexible Service Trace Setting page (EG_AUDIT_PNL) to turn on the application trace to provide a way to audit an application.

Navigation:

Set Up HCM > **Product Related** > **Workforce Administration** > **Flexible Service EG** > **Service Rules** > **Flexible Service Trace Setting** > **Flexible Service Trace Setting**

This example illustrates the fields and controls on the Flexible Service Trace Setting page.



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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.

Field or Control	*Description*
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 Faculty Calculation Group (EG_CALC_GROUPS) components. The topic provides an overview of service accrual tables.

Pages Used to Set Up Service Accrual Control Tables

Page Name	*Definition Name*	*Usage*
Calendar Page	EG_FLXSVC_CALNDR	Establish service calendars for accruing service years.
Group HR Action/Category Page	EG_HR_CATEGORY	Group similar actions and reasons that count toward service and tenure accrual.
Service Definition Page	EG_SVC_DEFINITION	Associate a calendar, a proration method, and a date method (for rounding) with the service definition name.
Service Include Category Page	EG_SVC_STATUS	• Define the HR service categories included in the service accrual process in the selected definition name. • Specify the date-rounding options for each HR category that is included on this page.

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Page Name	*Definition Name*	*Usage*
Service Add Periods Rules Page	EG_SVC_ADD_PERIODS	• Define the adjustments where the effective date of a status change moves forward. • Select the employee records that are affected by the parameters that you set throughout the Service Rules component.
Service Adj Future Page	EG_SVC_ADJ	Define human resource status history adjustments that depend on future changes in status.
Service Final Handling Page	EG_SVC_FINAL_RND	Set up final adjustments to the service amount.
Min/Max Service Rules Page	EG_SVC_MIN_MAX_SVC	Define adjustments that limit the number of hours or service units that can be accrued within a specific period of time.
Faculty Calculation Group Page	EG_CALC_GRP_DFN1	Define service calculation groups to group employees who have the same calculation rules applied to their service accrual process.

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 HR actions and categories.

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3. Associate a calendar, proration, and date method with a service definition name.
4. Define the HR service categories.
5. Define time adjustments.
6. Define HR 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.

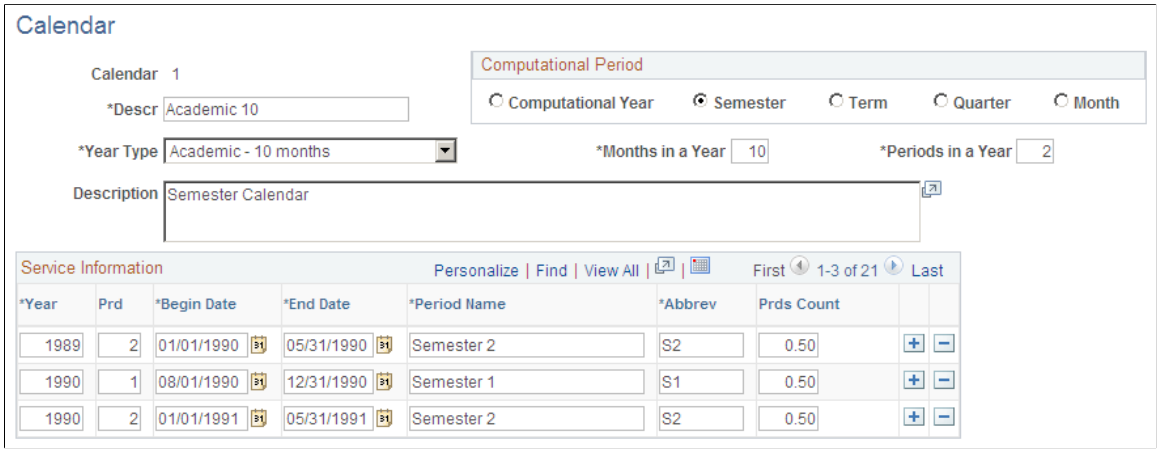
Calendar Page

Use the Calendar page (EG_FLXSVC_CALNDR) to establish service calendars for accruing service years.

Navigation:

- **Set Up HCM** > **Product Related** > **Workforce Development** > **Faculty Events** > **Calendar** > **Calendar**
- **Workforce Development** > **Faculty Events** > **Define Faculty Events Data** > **Calendar** > **Calendar**

This example illustrates the fields and controls on the 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).

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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

Field or Control	*Description*
Year, Semester, Term, Quarter, or **Month**	Select a time frame to accrue flexible service or tenure.
Year Type	Select a year type on which to base calculations. Then specify the number of months and periods in a year for this year type, for example, an academic year of *10* months divided into *4* periods (quarters). Your system is delivered with year types *Acad-10* and *Fiscal-12.* You can make additional entries on the translate table.
Months in a Year	Enter the number of months in the calendar year that you are defining.
Periods in a Year	Enter the number of periods in the calendar year.
Year	Enter the calendar year that is covered by the defined calendar. For example, if the academic year 2006 comprises two semesters, one starting in September 2005 and the other in January 2006, enter 2006 in this column for both semester rows.
Prd. (period)	Enter the period for the defined calendar year. Enter the calendar period numbers in sequence; for example, *1* through *4,* if you selected *Acad-10* divided into *4* periods.
Begin Date and **End Date**	Enter the period's start and end dates.
Period Name	Enter the period name.
Abbrev (abbreviation)	Enter an abbreviated name for the period.

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Field or Control	*Description*
Prds Count (periods count)	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.

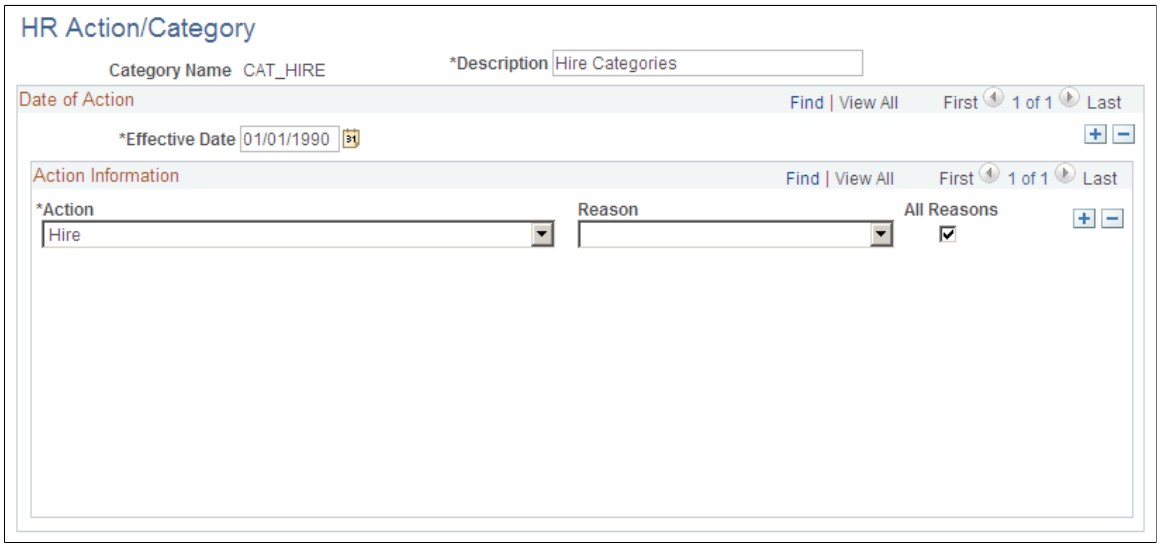
Group HR Action/Category Page

Use the Group HR Action/Category page (EG_HR_CATEGORY) to group similar actions and reasons that count toward service and tenure accrual.

Navigation:

- **Set Up HCM** > **Product Related** > **Workforce Development** > **Faculty Events** > **Group HR Action/Category** > **Group HR Action/Category**
- **Workforce Development** > **Faculty Events** > **Define Faculty Events Data** > **Faculty HR Action/Category** > **Faculty HR Action/Category**

This example illustrates the fields and controls on the Group HR Action/Category page.



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

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

grouping the categories on this page, you eliminate the need to identify them individually on the Service Include Category page.

See Service Include Category Page.

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

You can reference job action and reason codes only through HR 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 HR category to reference that code in the flexible service rules.

Field or Control	*Description*
Category Name	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/Category page. Examples of category names are CAT_LOA (category leave of absence) and CAT_HIRE (category hire).
Action	Select the job action that should accrue toward service in this HR category. To include more than one action for this category, select the **Insert Row** button to add rows.
Reason	Select a reason to include reason codes for a job action and make it eligible to accrue service credits. You can specify more than one reason for an action by adding a row and selecting the same action and a different reason.
All Reasons	Select to specify that all reason codes for a job action are eligible to accrue service credits. You don't need to add a row for each reason.

Related Links

Service Definition Page

Service Definition Page

Use the Service Definition page (EG_SVC_DEFINITION) to associate a calendar, a proration method, and a date method (for rounding) with the service definition name.

Navigation:

- **Set Up HCM** > **Product Related** > **Workforce Development** > **Faculty Events** > **Faculty Service Rules** > **Service Definition**

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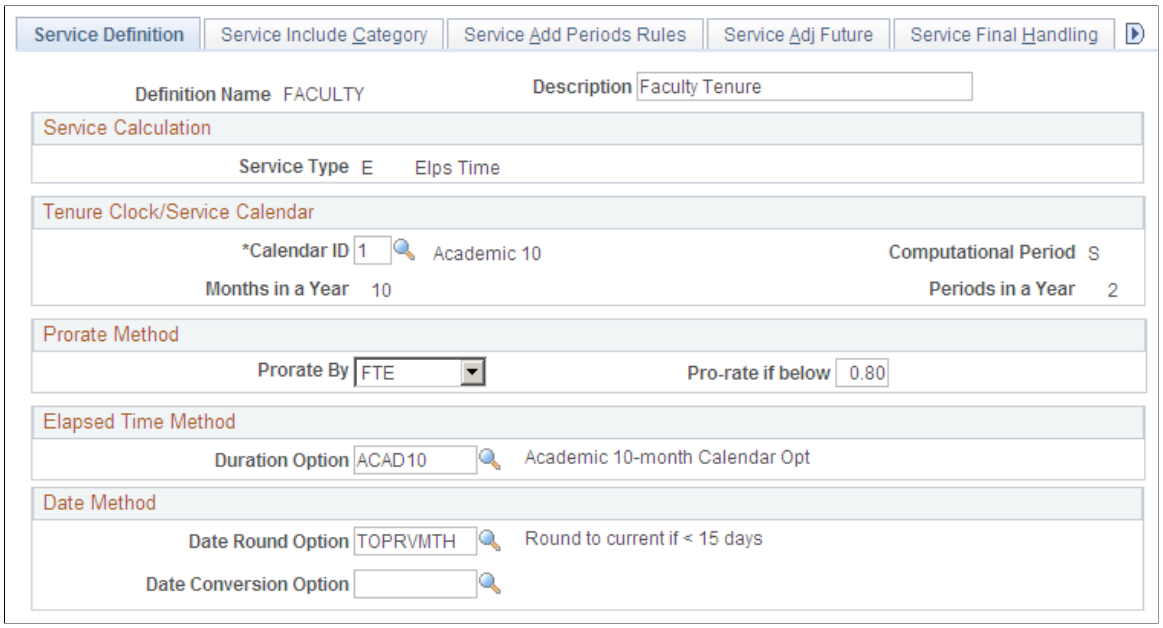
- **Workforce Administration > Flexible Service EG > Define Flexible Service Rules > Service Definition**
- **Workforce Development > Faculty Events > Define Faculty Events Data > Faculty Service Rules > Service Definition**

This example illustrates the fields and controls on the 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.

Field or Control	*Description*
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 Calculation

Field or Control	*Description*
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 HR action and category event changes on the employee's job history. See Service Include Category Page.

Tenure Clock/Service Calendar

Field or Control	*Description*
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 Calendar Page.
Months in a Year	Displays the number of months per year for the selected calendar, as defined on the Calendar page and based on the **Calendar ID** field. See Calendar Page.
Computational Period	Displays the period of time during which the service calculation is based. This is based on the Calendar ID field, for example, *S* (semester). This field is populated by the selected calendar, which is maintained on the Calendar page. See Calendar Page.
Periods in a Year	Displays the number of periods per year for the selected calendar and is based on the **Calendar ID** field.

Prorate Method

Field or Control	*Description*
Prorate By	Select a prorate method of *None* or *FTE* (full-time equivalency), depending on the type of service being tracked.
Pro-rate if below	Enter the percentage of FTE (for example, *80)* below which you want the system to prorate accrued service. The system calculates any FTE value that is equal to or greater than this value as 1.0, for the purpose of proration. This field isn't visible if you selected *None* in the **Prorate By** field. The system calculates all FTE values as 1.0.

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Elapsed Time Method

Field or Control	*Description*
Duration Option	Enter a duration from the list of options. You can set up different ways to calculate elapsed time using the Duration Option pages. See Setting Up Service Parameters.

Date Method

Field or Control	*Description*
Date Round Option	Enter a date rounding method to be used in calculating service dates. You set date rounding options on the Date Round Option page. See Flexible Service Date Round Page.
Date Conversion Option	Enter a date conversion method, such as *ACAD,* from the list of options. Date conversion methods are established and maintained on the Date Conversion Option page. This field applies only to the flexible service tracking. It doesn't apply to tenure tracking. See Flexible Service Date Round Page.

Related Links

Service Rules Date Conversion Page

Service Include Category Page

Use the Service Include Category page (EG_SVC_STATUS) to define the HR service categories in the service accrual process in the selected definition name. Use this page to specify the date-rounding options for each HR category that is included on this page.

Navigation:

- **Set Up HCM** > **Product Related** > **Workforce Development** > **Faculty Events** > **Service Rules** > **Service Include Category**
- **Workforce Administration** > **Flexible Service EG** > **Define Flexible Service Rules** > **Service Include Category**
- **Workforce Development** > **Faculty Events** > **Define Faculty Events Data** > **Service Rules** > **Service Include Category**

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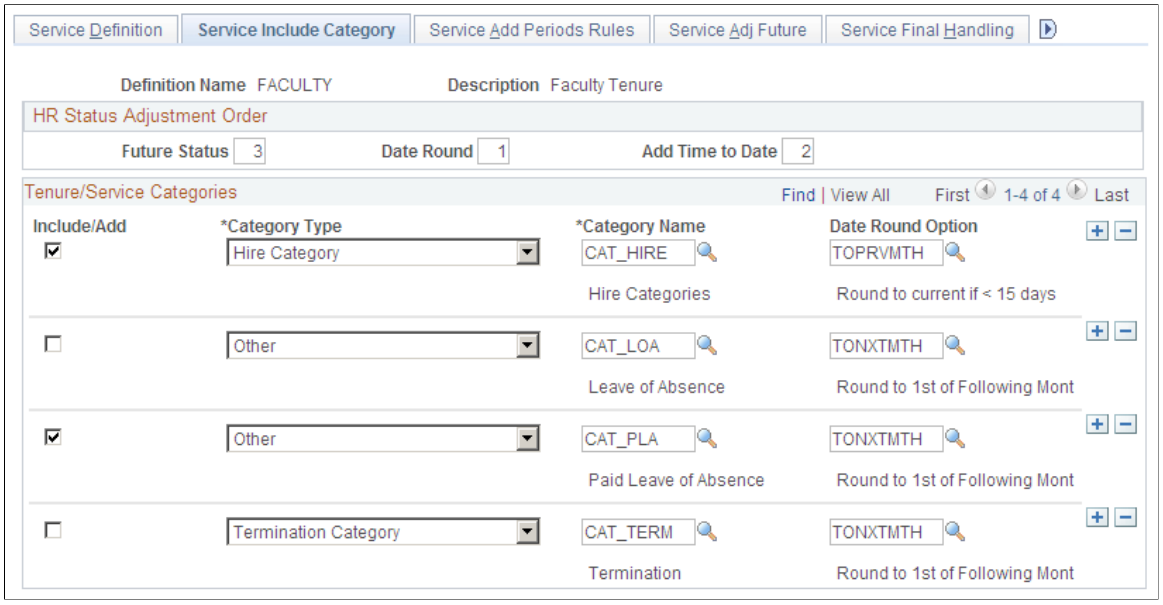
This example illustrates the fields and controls on the Service Include Category page.



Employees accrue service credits based on the action and reason codes in their job history. The HR' 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 HR category determine whether an employee accrues credits for each job action and reason.

See Group HR Action/Category Page.

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 background 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.

Field or Control	*Description*
Future Status	Refers to the status entered on the Service Adj Future page. See Service Adj Future Page.
Date Round	Refers to the date round options set on this page.
Add Time to Date	Refers to the adjustment entered on the Service Add Periods Rules page. See Service Add Periods Rules Page.

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Tenure/Service Categories

Field or Control	*Description*
Include/Add	Select to have the service category in the **Category Name** field count toward service accrual. For example, select this check box if you want a leave of absence to count toward service accrual.
Category Type	Select a category type such as *Hire Category, Other,* or *Termination Category.*
Category Name	Enter a HR category name, such as *CAT_LOA* (category leave of absence). An HR category comprises one or more job action and reason codes. You establish HR categories and their component HR' action and category groups on the HR Action/ Category page. See Group HR Action/Category Page. For example, if you select the category *CAT_HIRE* (category hire), which you set up to include the action codes *HIRE* (hire) and *REH* (rehire), select the **Include/Add** check box to make both of these job action codes eligible for accrual within the definition name.
Date Round Option	Enter the option that is to be used for each HR category. For example, you might round all hire and rehire dates to the first of the month. Thus, credit is accrued based on the first of the month, regardless of the date in the month that the employee was hired. These options are maintained on the Flexible Service Date Round Page.

Service Add Periods Rules Page

Use the Service Add Periods Rules page (EG_SVC_ADD_PERIODS) to define the adjustments where the effective date of a status change moves forward. Use this page to select the employee records that are affected by the parameters that you set throughout the Service Rules component.

Navigation:

- **Set Up HCM** > **Product Related** > **Workforce Development** > **Faculty Events** > **Service Rules** > **Service Add Periods Rules**
- **Set Up HCM** > **Product Related** > **Workforce Development** > **Faculty Events** > **Service Rules** > **Service Add Periods Rules**
- **Workforce Development** > **Faculty Events** > **Define Faculty Events Data** > **Service Rules** > **Service Add Periods Rules**

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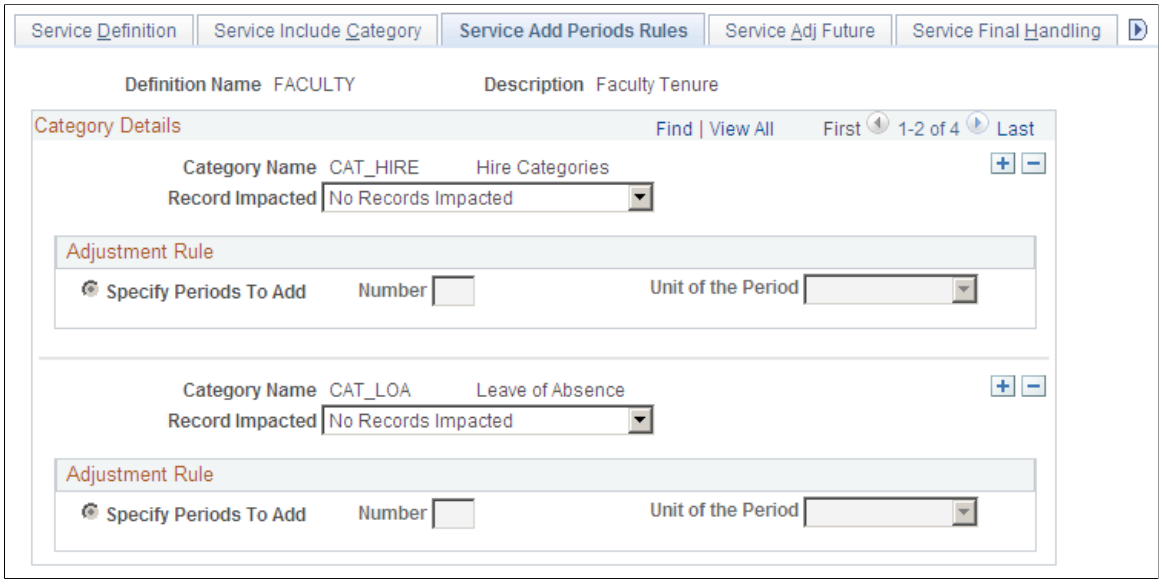
This example illustrates the fields and controls on the Service Add Periods Rules page.



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.

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

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Field or Control	*Description*
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.
Number	Enter the number of periods to add to the accrued service.
Unit of the Period	Select the unit for the periods that you are adding. For instance, if you select *Days* in this field and enter *2* in the **Number** field, the system adds two days to the effective date of the selected category.

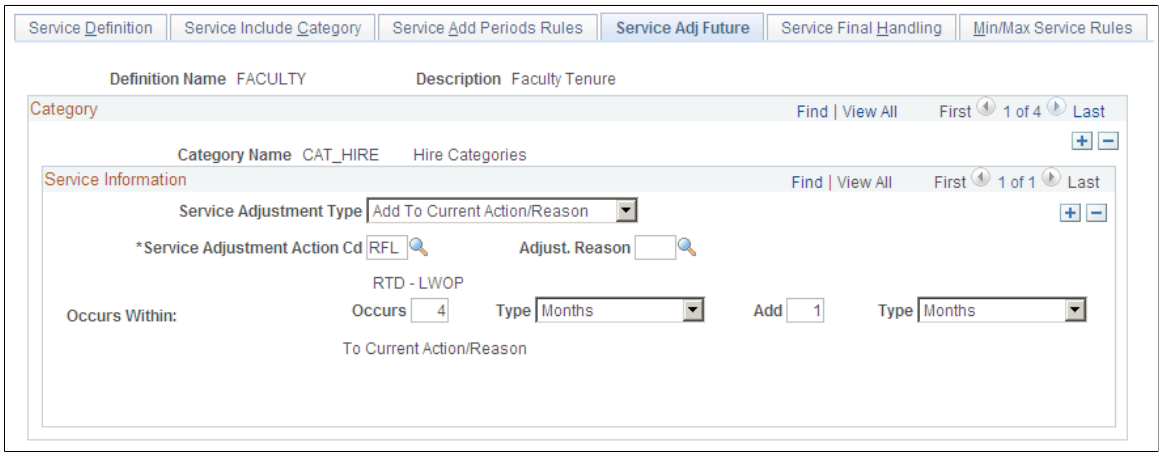
Service Adj Future Page

Use the Service Adj Future (service adjust future) page (EG_SVC_ADJ) to define human resource status history adjustments that depend on future changes in status.

Navigation:

- **Set Up HCM** > **Product Related** > **Workforce Development** > **Faculty Events** > **Service Rules** > **Service Adj Future**
- **Workforce Administration** > **Flexible Service EG** > **Define Flexible Service Rules** > **Service Adj Future**
- **Workforce Development** > **Faculty Events** > **Define Faculty Events Data** > **Service Rules** > **Service Adj Future**

This example illustrates the fields and controls on the Service Adj Future page.



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

Adding Time to the Effective Date of a Status Change

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

For example, you can adjust the effective date of a leave of absence by 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	***01/01/2006***	***Hire***	***01/01/2006***
Leave	05/01/2006	None	None
Return	05/15/2006	Return	05/15/2006

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.

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Service Information

Field or Control	*Description*
Service Adjustment Type	Select from the list of values. Options are: • *Add* • *Ignore Cur* (ignore current) • *Ignore Fut* (ignore future) • *Insert* Some of the fields that appear below this field vary, depending on the value that you select here.
Service Adjustment Action Cd (service adjustment action code)	Enter the type of service adjustment action, such as *HIRE* (hire).
Adjust. Reason (adjustment reason)	Enter the reason for the adjustment, such as *LTDP* (long term disability with pay).
Occurs Within	The system displays this when you select *Add, Ignore Cur,* or *Ignore Fut* in the **Service Adjustment Type** field.
Does Not Occur Within	The system displays this when you select *Insert* in the **Service Adjustment Type** field.
AdjWin Num (adjustment window number)	Enter a number to use in conjunction with the **Type** field.
Type	Select *Days, Months, User Code, Weeks,* or *Years.*
Add	Enter a time period to add to the service adjustment. This field appears when you select *Add* in the **Service Adjustment Type** field.
Ignore Future	Select the type of service adjustment action that is to be ignored in the future. This field appears when you select *Ignore Fut* in the **Service Adjustment Type** field.
Adj Act 2 (adjustment action 2)	Select a service adjustment action that is define in the HR category. This field appears when you select *Insert* or *Ignore Fut* in the **Service Adjustment Type** field.

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Field or Control	*Description*
Reason	Select the reason code that is defined in the HR category. This field appears when you select *Insert* or *Ignore Fut* in the **Service Adjustment Type** field.
Insert	Select the type of service adjustment action that is to be inserted. This field appears when you select *Insert* in the **Service Adjustment Type** field.

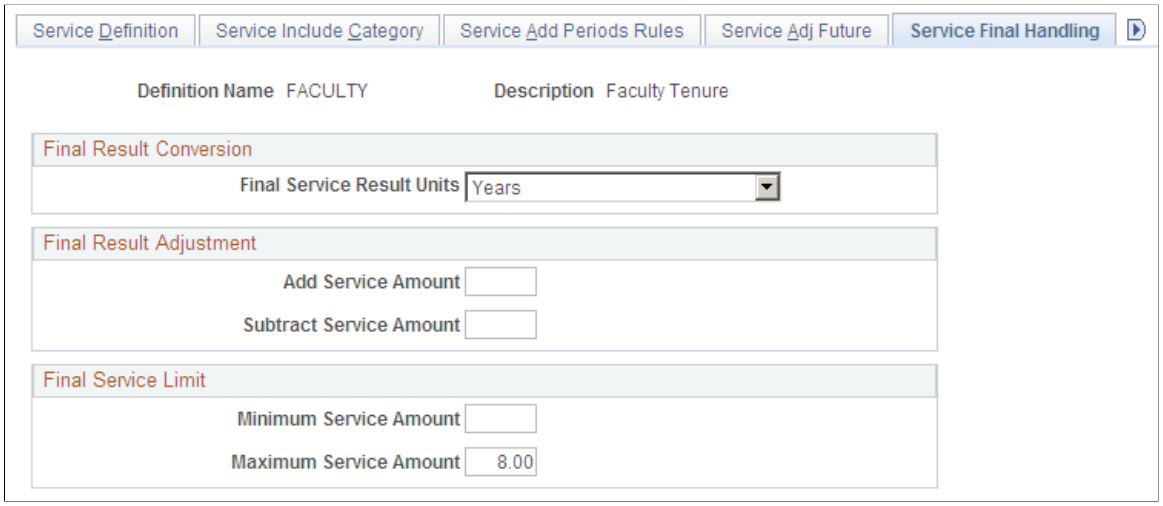
Service Final Handling Page

Use the Service Final Handling page (EG_SVC_FINAL_RND) to set up final adjustments to the service amount.

Navigation:

- **Set Up HCM** > **Product Related** > **Workforce Development** > **Faculty Events** > **Service Rules** > **Service Final Handling**
- **Workforce Administration** > **Flexible Service EG** > **Define Flexible Service Rules** > **Service Final Handling**
- **Workforce Development** > **Faculty Events** > **Define Faculty Events Data** > **Service Rules** > **Service Final Handling**

This example illustrates the fields and controls on the 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.

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Final Result Conversion

Field or Control	*Description*
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

Field or Control	*Description*
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

Field or Control	*Description*
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.

Min/Max Service Rules Page

Use the Min/Max Service Rules (minimum and maximum service rules) page (EG_SVC_MIN_MAX_SVC) to define adjustments that limit the number of hours or service units that can be accrued within a specific period of time.

Navigation:

- **Set Up HCM** > **Product Related** > **Workforce Development** > **Faculty Events** > **Service Rules** > **Min/Max Service Rules**
- **Workforce Administration** > **Flexible Service EG** > **Define Flexible Service Rules** > **Min/Max Service Rules**
- **Workforce Development** > **Faculty Events** > **Define Faculty Events Data** > **Service Rules** > **Min/Max Service Rules**

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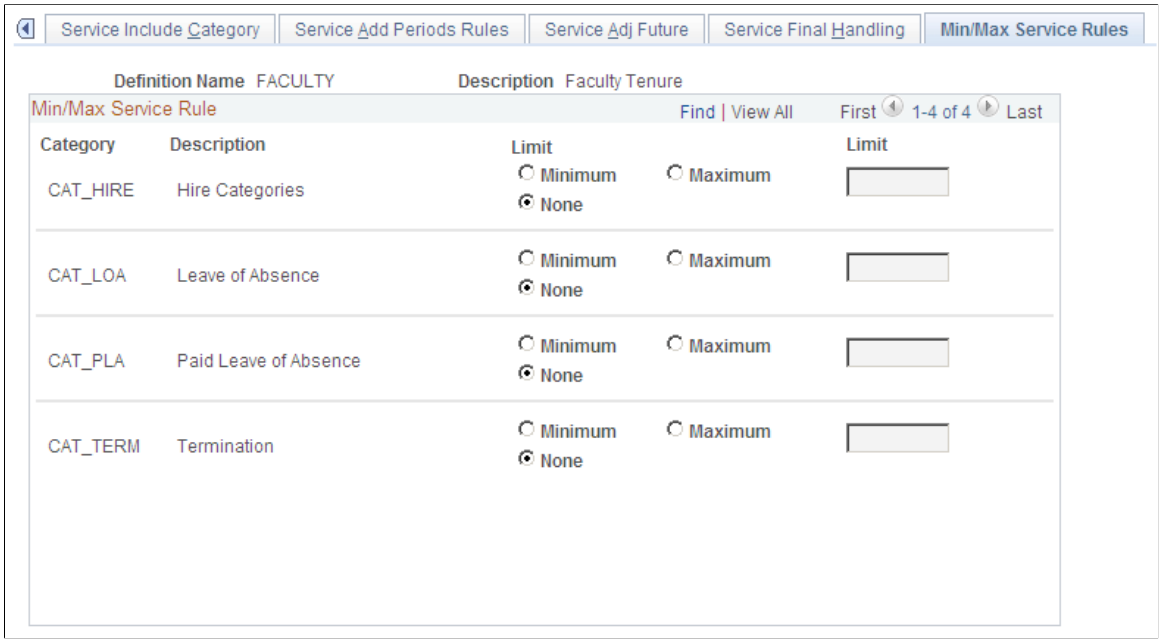
This example illustrates the fields and controls on the Min/Max Service Rules page.



These rules apply to an HR action and category that is based on a calendar period.

If there are additional categories, use the scroll arrow to display more categories and rules. To add a new row, select the **Insert Row** button on the Service Include Category page.

Field or Control	*Description*
Category	Displays the service category, such as *CAT_HIRE* (category hire), which is defined on the Service Include Category page. See Service Include Category Page.
Description	Displays service category descriptions (such as *Hire Categories),* which are maintained on the Service Include Category page. See Service Include Category Page.
Limit	Select **Minimum** or **Maximum** to specify a minimum or maximum service limit for each category that is listed. Select **None** for no limit.
Service	Enter the minimum or maximum amount of service for the selected category. This field is required if you selected **Minimum** or **Maximum** as a limit.

Faculty Calculation Group Page

Use the Faculty Calculation Group page (EG_CALC_GRP_DFN1) to define service calculation groups to group employees who have the same calculation rules applied to their service accrual process.

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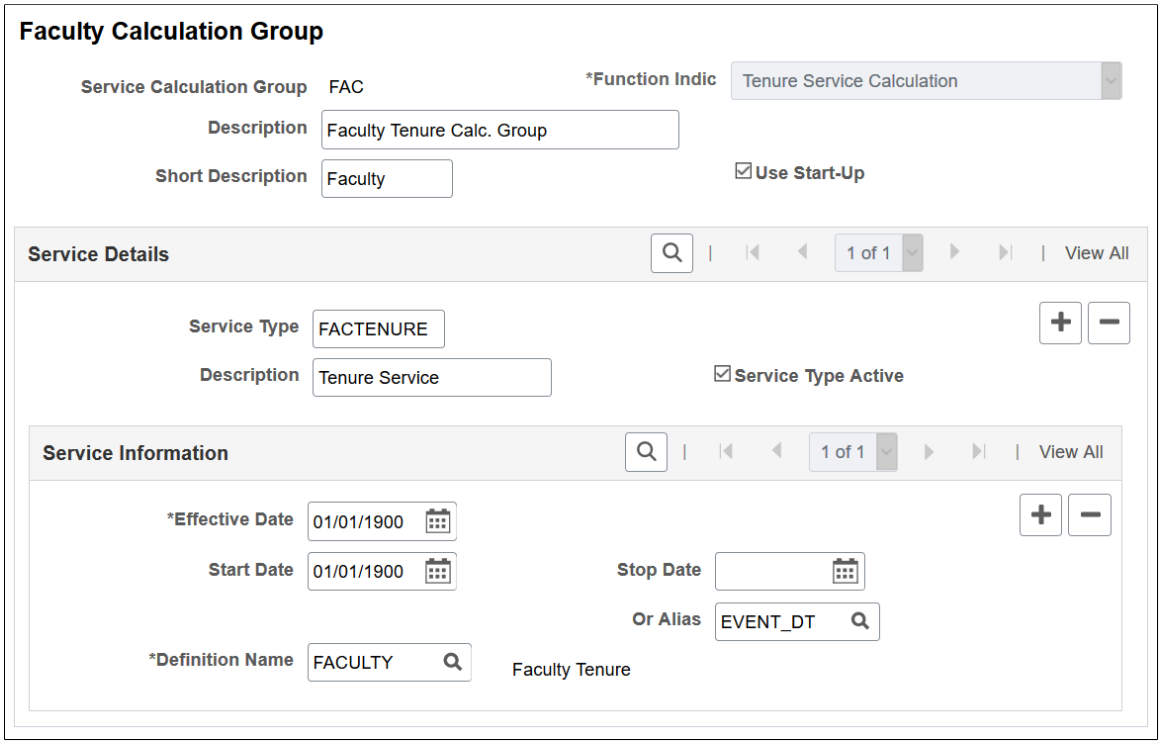
Navigation:

- **Set Up HCM** > **Product Related** > **Workforce Development** > **Faculty Events** > **Faculty Calculation Group** > **Faculty Calculation Group**
- **Workforce Development** > **Faculty Events** > **Define Faculty Events Data** > **Calculation Group** > **Calculation Group**

This example illustrates the fields and controls on the Faculty Calculation Group page.



The layouts of the Faculty Calculation Group page and Calculation Group page are identical.

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 “Flexible Service History Page” (PeopleSoft Human Resources Track Flexible Service).

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.

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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.

Field or Control	***Description***
Service Calculation Group	Displays the name that you entered for this calculation group in the Add (if you are creating a new calculation group) or search page. A calculation group name can be up to six characters.
Function Indic. (function indicator)	Select the function, or process, for which this calculation group will be used. Values are *Flex Srvc* (flexible service) and *Tenure.*
Use Start-Up	Select this check box to include start-up credits to the employee's accrued service. Start-up credit is maintained on the Service Detail page for the employee. Leaving the check box deselected will exclude prior service credits in the calculations.
Service Type	Enter the service type to assign to this calculation group. To assign additional service types, press **F7** or select the **Insert Row** button to add rows.
Service Type Active	Select to activate a service type for the current calculation group. If you deselect the check box for a service type, that service type isn't included in the service accrual process.
Start Date	Enter a valid calendar date as the start date for this calculation group. The start date determines when the change is added to the system. Use a valid calendar date, not an alias, as the start date.
Stop Date	Enter a stop date in this field or select an alias in the **Alias** field. You must do one or the other.
Or Alias	If you did not enter a stop date in the **Stop Date** field, enter an alias in this field. **Or Alias** is a critical field. Enter the alias, *EVENT_DT* (event date), which links to the job history in the calculation process. The EVENT_DT alias is maintained on the Flexible Service DB Alias page. In the case of a service calculation, the through date is used as the event date.

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Field or Control	*Description*
Definition Name	Once you enter a service type for this calculation group, you must indicate the service rules definition name that the service type will use. This is where your calendar links. 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: • Which calendar to use. • Which date rounding and proration methods to use. • What service categories (action and category code groupings) are eligible for inclusion in the service calculation process.

Related Links

Flexible Service DB Alias Page

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.

Pages Used to Set Up Tenure Tracking

Page Name	*Definition Name*	*Usage*
Academic Rank Page	EG_RANK_TBL	Establish academic ranks, tenure tracking eligibility for those ranks, and probationary periods. Before using this page, set up the Faculty Calculation Group page.
Experience/Credit Codes Setup Page	EG_EXP_DFN	Set up the experience and credit codes that employees can earn at other institutions and apply toward tenure at your organization. Set up a credit code for start-up credit to bring forward any accrued service credit in your organization on the initial loading of tenure service data.

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Academic Rank Page

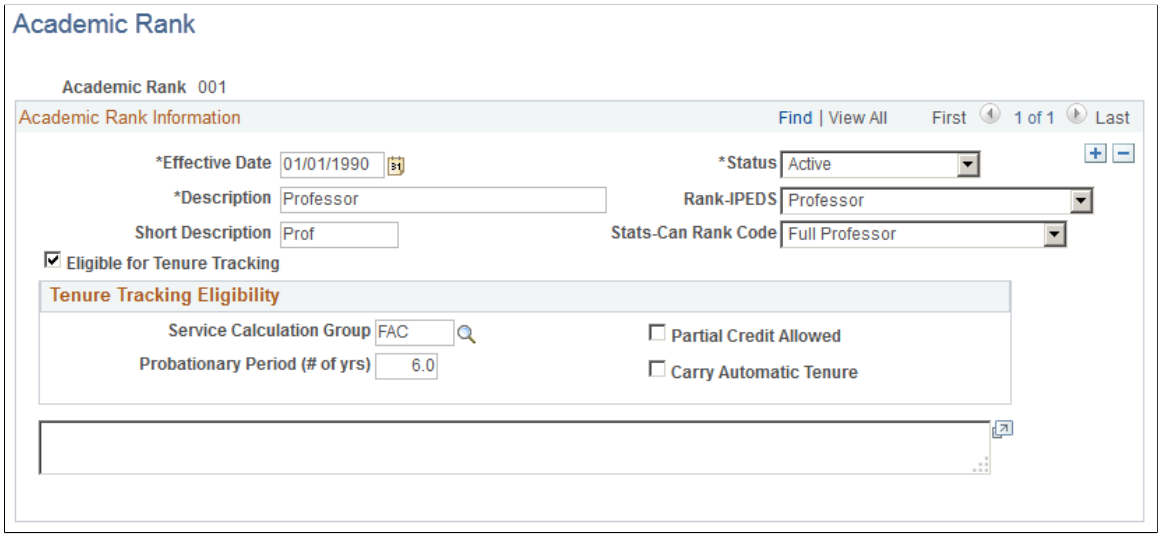
Use the Academic Rank page (EG_RANK_TBL) to establish academic ranks, tenure tracking eligibility for those ranks, and probationary periods.

Before using this page, set up the Faculty Calculation Group page.

Navigation:

- **Set Up HCM** > **Product Related** > **Workforce Development** > **Faculty Events** > **Academic Rank** > **Academic Rank**
- **Workforce Development** > **Faculty Events** > **Define Faculty Events Data** > **Academic Rank** > **Academic Rank**

This example illustrates the fields and controls on the Academic Rank page.



Academic Rank Information

Field or Control	*Description*
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.*
(E&G) Stats-Can Rank Code	Select the Statistics Canada rank code for the academic rank. Different options are available depending on the effective. Dates up to and including September 20, 2009 have one set of options, dates on or after October 1, 2009 have a modified set of options.
Eligible for Tenure Tracking	Select if the academic rank is eligible for tenure tracking. This does not affect the tenure calculation process.

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Tenure Tracking Eligibility

Field or Control	*Description*
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.

Experience/Credit Codes Setup Page

Use the Experience/Credit Codes Setup page (EG_EXP_DFN) to set up the experience and credit codes that employees can earn at other institutions and apply toward tenure at your organization.

Set up a credit code for start-up credit to bring forward any accrued service credit in your organization on the initial loading of tenure service data.

Navigation:

- **Set Up HCM** > **Product Related** > **Workforce Development** > **Faculty Events** > **Experience/Credit Codes Setup** > **Experience/Credit Codes Setup**
- **Workforce Development** > **Faculty Events** > **Define Faculty Events Data** > **Experience/Credit Codes Setup** > **Experience/Credit Codes Setup**

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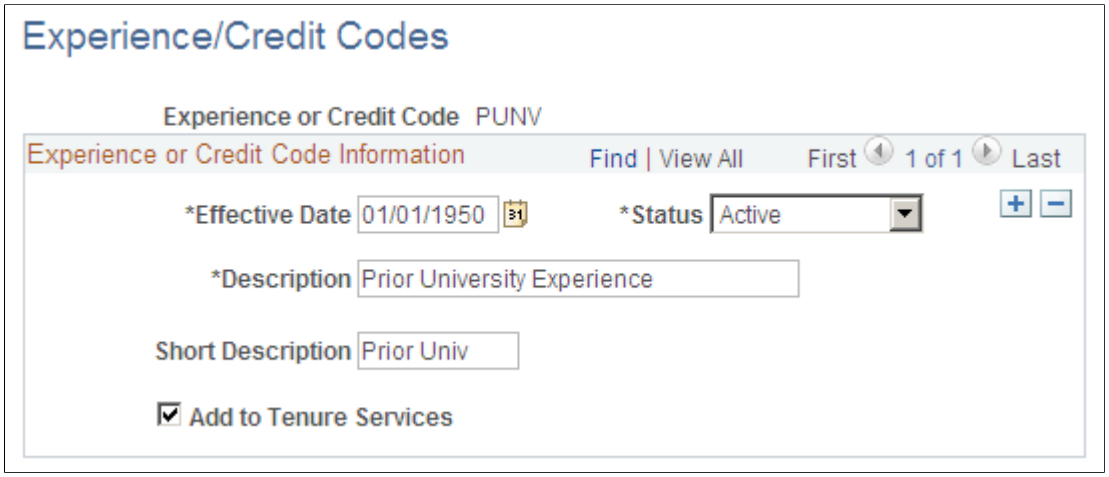
This example illustrates the fields and controls on the Experience/Credit Codes page.



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

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

Assigning an Employee to Tenure

This topic provides an overview of employee tenure.

Pages Used to Assign an Employee to Tenure

Page Name	*Definition Name*	*Usage*
Tenure Data Page	EG_EMPL_TENURE	Maintain tenure tracking data for employees. Default information is automatically populated from the Job Data component.
Prior Experience/Credits Page	EG_PRIOR_EXP	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 Experience/Credit Codes page.

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Page Name	*Definition Name*	*Usage*
Review Rank/Status History Page	EG_TENURE_CHG	View changes made to academic rank and tenure status associated with a home department. The system automatically tracks changes. This page is display-only.
Review Current Jobs for Tenure Page	EG_JOB_VW	Review current jobs that count toward an employee's tenure. This page is display-only.

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.

Activating Tenure Accrual

To activate tenure tracking for an employee:

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

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

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

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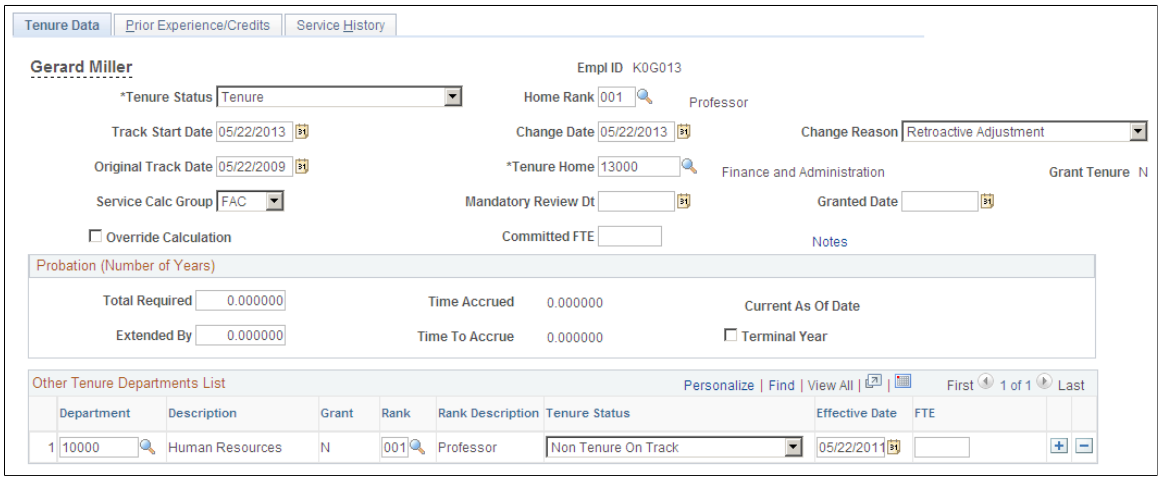
Tenure Data Page

Use the Tenure Data page (EG_EMPL_TENURE) to maintain tenure tracking data for employees. Default information is automatically populated from the Job Data component whenever the Tenure Status is changed.

Navigation:

Workforce Development > Faculty Events > Calculate Tenure > Create Tenure Data > Tenure Data

This example illustrates the fields and controls on the Tenure Data page.



Field or Control	*Description*
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 *001* (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 *09/01/2005,* then the calendar begin date must be 09/01/2005. For this reason, you might define calendars only to accommodate track start dates.

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

Probation (Number of Years)

Field or Control	*Description*
Total Required	Displays the total number of probationary years required before granting tenured status. The system automatically populates this value from the Academic Rank table.

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Field or Control	*Description*
Time Accrued	Displays the number of accrued probationary years. The system populates this value on the Service History page.
Current As Of Date	Displays the end date of the last processed computational period.
Extended By	Enter the number of years by which the probationary period is extended for this employee, if appropriate.
Time To Accrue	Displays the remaining probationary years that the employee must accrue.
Terminal Year	Select when the employee is in the last year of probation. For example, if the total of required probationary years is *8* and the time to accrue is *1,* select this check box. The **Time Accrued** and **Time To Accrue** fields display *0* years when you select this check box.

Other Tenure Departments List

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.

Field or Control	*Description*
Department	Enter other departments in which the employee is accruing tenure. For example, an employee might hold positions in two departments.
Rank	Enter the rank that the employee holds in that department. Maintain ranks in the Academic Rank table.
Tenure Status	Enter the employee's tenure status for the position.
Effective Date	Enter the date the tenure status is effective.
FTE (full-time equivalent)	Enter the percentage of time the employee is a committed FTE.

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Related Links

"Department Profile Page" (Application Fundamentals)

Prior Experience/Credits Page

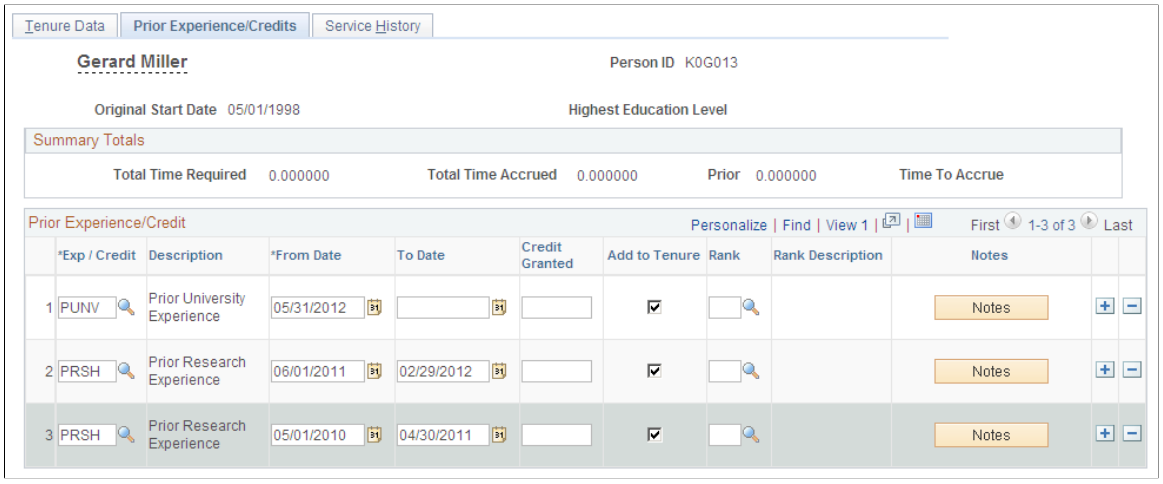
Use the Prior Experience/Credits page (EG_PRIOR_EXP) to track an employee's service accrued from other institutions that counts toward your organization's tenure service clock.

Maintain experience and credit types on the Experience/Credit Codes page.

Navigation:

Workforce Development > Faculty Events > Calculate Tenure > Create Tenure Data > Prior Experience/Credits

This example illustrates the fields and controls on the Prior Experience/Credits page.



Field or Control	*Description*
Original Start Date	Displays the employee's hire date.
Highest Education Level	Displays the employee's highest level of education.

Summary Totals

Field or Control	*Description*
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.

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Field or Control	*Description*
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

Field or Control	*Description*
Exp / Credit (experience/credit)	Select the employee's previous experience or credit type, such as *PRSH* (research).
From Date and **To Date**	Enter the beginning and ending dates of the experience or credit.
Credit Granted	Enter the amount of credit granted for the prior experience.
Add to Tenure	Select this check box to add these credits to tenure accrual.
Rank	Select the rank at which the credits were granted, such as *001* (professor).
Notes	Select to enter comments regarding prior experience.

Review Rank/Status History Page

Use the Review Rank/Status History page (EG_TENURE_CHG) to view changes made to academic rank and tenure status associated with a home department.

The system automatically tracks changes. This page is display-only.

Navigation:

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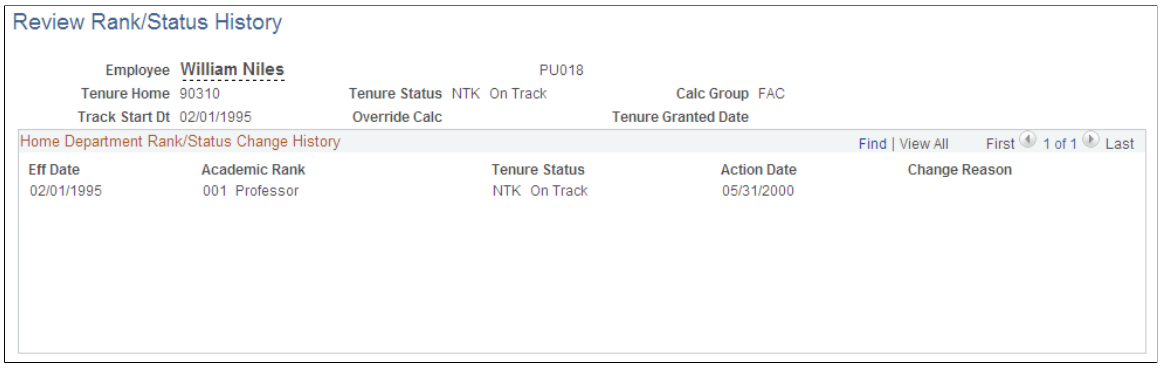
Workforce Development > Faculty Events > Calculate Tenure > Review Rank/Status History > Review Rank/Status History

This example illustrates the fields on the Review Rank/Status History page.



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

Field or Control	*Description*
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.

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Field or Control	*Description*
Action Date	Displays the date the rank or status change takes place.
Change Reason	Displays the reason for the rank or status change.

Review Current Jobs for Tenure Page

Use the Review Current Jobs for Tenure page (EG_JOB_VW) to review current jobs that count toward an employee's tenure.

This page is display-only.

Navigation:

Workforce Development > **Faculty Events** > **Calculate Tenure** > **Review Current Jobs for Tenure** > **Review Current Jobs for Tenure**

This example illustrates the fields on the Review Current Jobs for Tenure page.

Field or Control	*Description*
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.

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Field or Control	*Description*
Calc Group (calculation group)	Displays the calculation group used to calculate this employee's tenure, such as *FAC.*.
Override Calc (override calculation)	Displays a *Y* for yes only if the **Override Calculation** check box is selected on the Tenure Data page.
Tenure Granted Dt (tenure granted date)	Displays the date the employee received tenure status.

Jobs Counted for Tenure Accrual

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

Running the Tenure Calculation Process

This topic provides an overview of the tenure calculation process.

Pages Used to Run the Tenure Calculation Process

Page Name	*Definition Name*	*Usage*
Perform Tenure Calculations Page	RUNCTL_EGPP01	Calculate tenure. Run tenure calculation processes and update tenure service history. Before using this page, set up the Calculation Group page.

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Page Name	*Definition Name*	*Usage*
Message Log Page Review Processing Messages Page	EG_MESSAGE_LOG	View dated and timed information about calculation processes. Track errors in processes and searches for error messages associated with a particular run.
View Flexible Periodic Results Page or Review Tenure Run Results Review Tenure Run Results Page	EG_PRDIC_RSLTS	View the results of the tenure calculation process, such as the employee's tenure status, what was processed, and whether the run was successful or not. This information is temporary and changes when you run the calculation process in Update to History mode.
Tenure Calculation Summary Page	EG_CLC_SVC_SUM	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 Page	EG_SVC_HIST	View the service history for employees and enter service adjustments and codes. Maintain adjustment action and reason codes on the HR Action/Category page.

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 View Flexible Periodic Results 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.

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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 Perform Tenure Calculations 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 Setting Up Service Accrual Control Tables.

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

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

- Reviews the action and category codes of employees in the calculation group to determine 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.**

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  - 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.

Related Links

Setting Up Service Parameters
Setting Up Service Accrual Control Tables

Perform Tenure Calculations Page

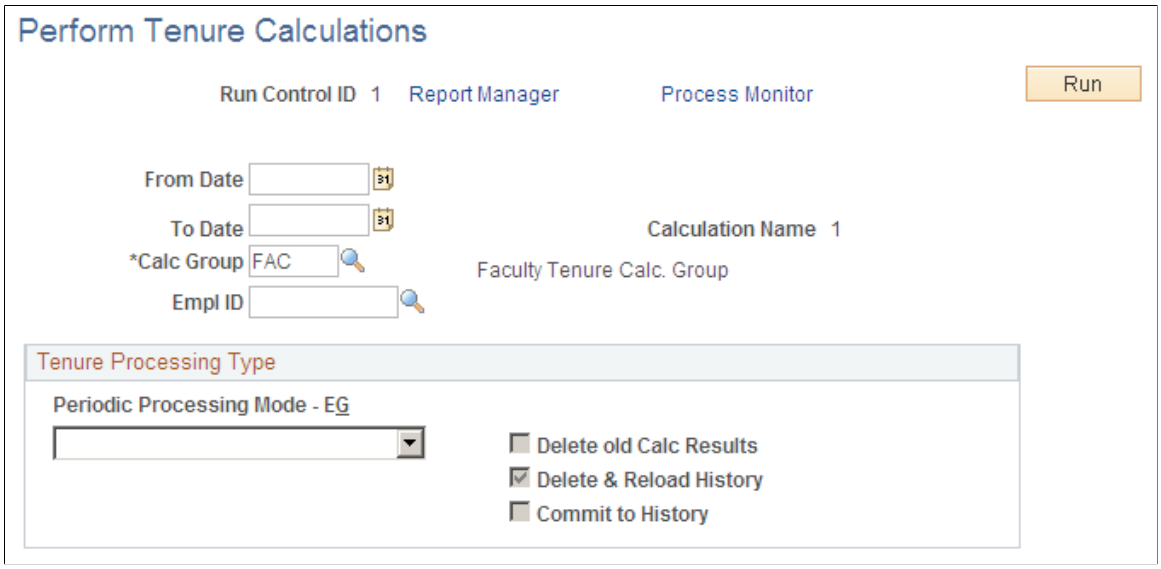
Use the Perform Tenure Calculations page (RUNCTL_EGPP01) to calculate tenure.

Run tenure calculation processes and update tenure service history. Before using this page, set up the Calculation Group page.

Navigation:

Workforce Development > **Faculty Events** > **Calculate Tenure** > **Perform Tenure Calculations** > **Perform Tenure Calculations**

This example illustrates the fields and controls on the Perform Tenure Calculations page.



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Field or Control	*Description*
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: 01/01/05 to 06/31/05, and 07/01/05 to 12/31/05. Therefore, enter *01/01/05* as the from date and *12/31/05* as the to date. The process creates a service history for each computational period.
Calc Group (calculation group)	Select the calculation group, such as *FAC* (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.

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Field or Control	*Description*
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 Review 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.

Message Log Page

Use the Message Log page (EG_MESSAGE_LOG) to view dated and timed information about calculation processes.

Track errors in processes and searches for error messages associated with a particular run.

Navigation:

- **Workforce Administration** > **Flexible Service EG** > **Message Log** > **Message Log**
- **Workforce Development** > **Faculty Events** > **Calculate Tenure** > **Review Processing Messages** > **Review Processing Messages**

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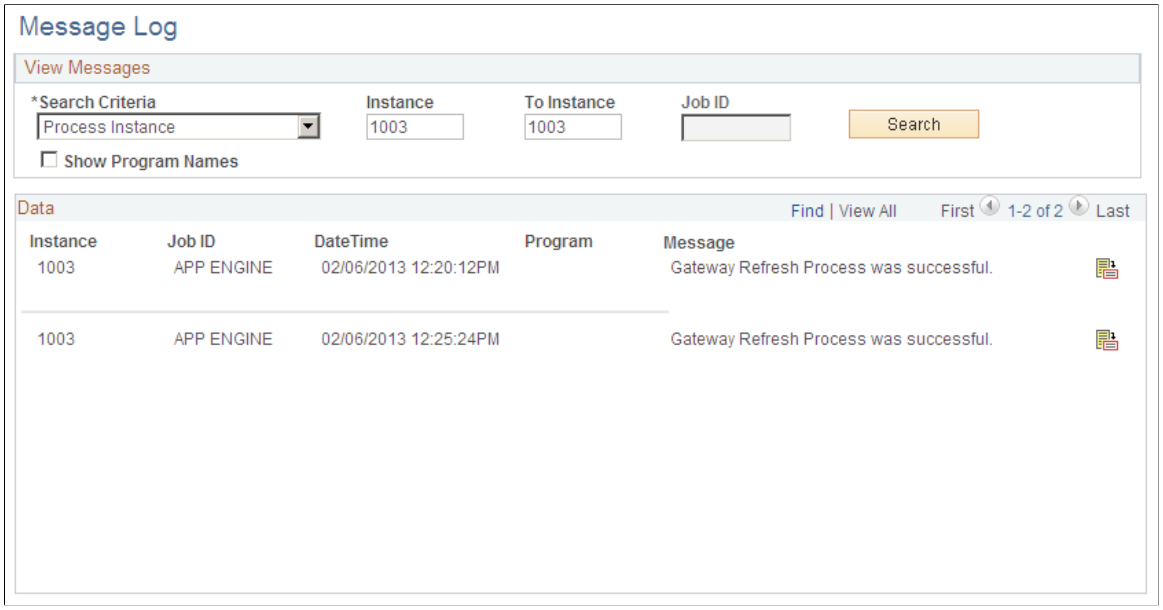
This example illustrates the fields and controls on the Message Log page.



Field or Control	*Description*
Search Criteria	Select *All, 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	Select to display the error messages.
Date Time	Displays the date and time the program ran.
Program	Displays the program message in the text box if you selected the **Show Program Names** check box.
	Select the **More** button to display detailed information about an error message.

View Flexible Periodic Results Page or Review Tenure Run Results

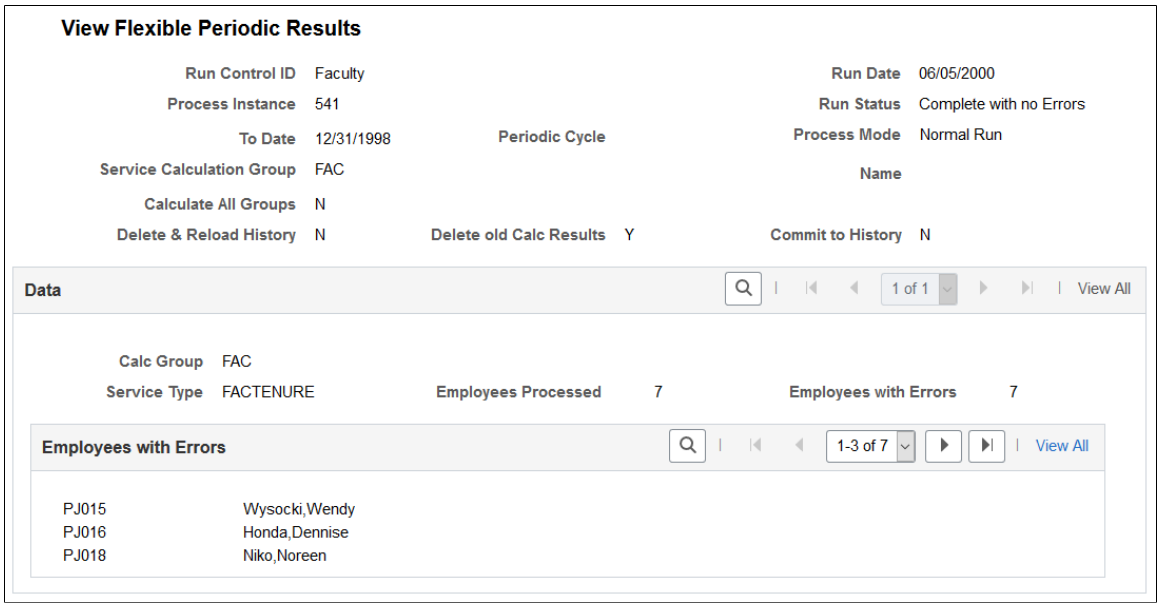
Use the View Flexible Periodic Results or Review Tenure Run Results page (EG_PRDIC_RSLTS) to view the results of the tenure calculation process, such as the employee's tenure status, what was processed, and whether the run was successful or not.

This information is temporary and changes when you run the calculation process in Update to History mode.

Navigation:

- **Workforce Administration** > **Flexible Service EG** > **View Flexible Periodic Results** > **View Flexible Periodic Results**
- **Workforce Development** > **Faculty Events** > **Calculate Tenure** > **Review Tenure Run Results** > **Review Tenure Run Results**

This example illustrates the fields on the View Flexible Periodic Results page.



Field or Control	*Description*
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.
Periodic Cycle	Displays the periodic cycle for this run control ID.

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Field or Control	*Description*
Process Mode	Displays the period processing mode from the Perform Tenure Calculations page (for track faculty events) or the Service Calc page (for track flexible service).
Service Calculation Group	Displays the calculation group included in this calculation process run.
Name	Displays the employee's ID number if you are running the calculation process for an individual employee.
Calculate All Groups	Displays *N* (no).
Delete & Reload History, Delete old Calc Results, and **Commit to History**	Displays *Y* (yes) or *N* (no), depending on the period processing mode that you selected.
Service Type	Displays the service type included in the calculation process.
Employees Processed	Displays the number of employees processed during this calculation.
Employees with Errors	Displays the number of employee records the system designated as erroneous during the calculation process.

Tenure Calculation Summary Page

Use the Tenure Calculation Summary page (EG_CLC_SVC_SUM) to 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.

Navigation:

Workforce Development > **Faculty Events** > **Calculate Tenure** > **Tenure Calculation Summary** > **Tenure Calculation Summary**

Field or Control	*Description*
From Date and **To Date**	Displays the dates between which the tenure calculation process ran.
Begin/End Date	Displays the beginning and ending dates for this calculation process.
Service Amt without Breaks (service amount without breaks)	Displays the amount of service without breaks that counts toward tenure.

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Field or Control	*Description*
Service Amt with Breaks (service amount with breaks)	Displays the amount of service with breaks that counts toward tenure.
Accrued Service	Displays the total amount of accrued service time.
Accum Breaks (accumulated breaks)	Displays the total amount of accumulated breaks in service. **Note:** If the employee has existing service history, the total service amount comes forward in an entry with an action of *BFW*. Begin and end dates for the entry show the date prior to the from date of the period specified on the Perform Tenure Calculations page.
Action	Displays the job action code that contributed to the service accrual for the calendar period.
Breaks	Displays the amount of breaks in service.
EmplID	Displays the ID of the employee whose service information was processed.

Service History Page

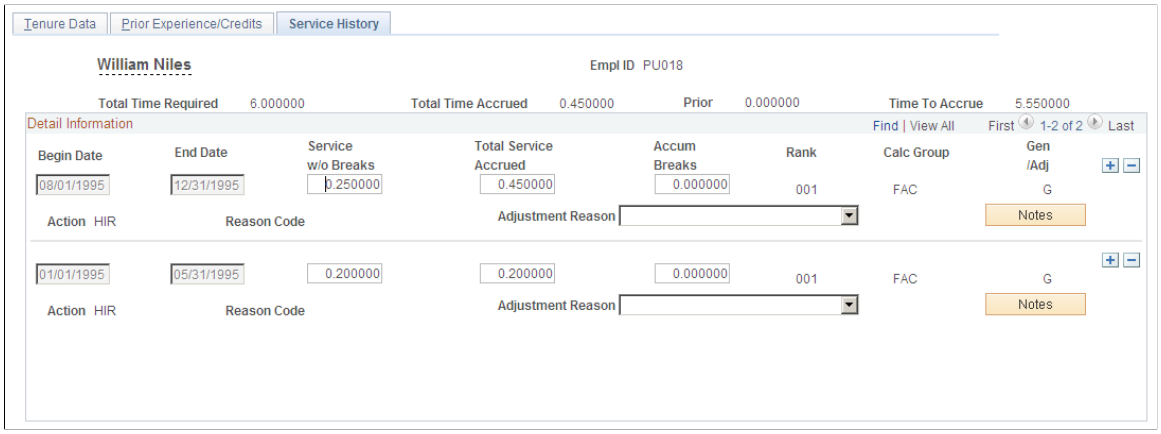
Use the Service History page (EG_SVC_HIST) to view the service history for employees and enter service adjustments and codes.

Maintain adjustment action and reason codes on the HR Action/Category page.

Navigation:

Workforce Development > **Faculty Events** > **Calculate Tenure** > **Create Tenure Data** > **Service History**

This example illustrates the fields and controls on the Service History page.



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

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Chapter 4

Tracking Events

Tracking Faculty Events

This topic lists common elements and discusses how to track various faculty events.

Pages Used to Track Faculty Events

Page Name	*Definition Name*	*Usage*
Activities Page	EG_ACTIVITIES	Track employees' research activities by type of academic activity, date, sponsor, and organization.
Faculty Administrative Posts Page	EG_ADMIN_POST_TBL	Set up administrative posts.
Track Administrative Posts Page	EG_ADMIN_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 Faculty Events - Administrative Posts page (EG_ADMIN_POST_TBL).
Faculty Presentations Page	EG_PRESENTATIONS	Track information about presentations given by employees.
Faculty Publications Page	EG_PUBLICATIONS	Track information about the employees' published works.
Student Advisement Activity Page	EG_ADVISEMENT	Track information about any advisement activities.
Track Teaching Responsibility Page	EG_TEACHING_RESP	Track faculty teaching responsibilities.

Common Elements Used to Track Faculty Events

Field or Control	*Description*
Average Grade	Enter an average grade, using letters or numbers. For example, *3.8*.

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Field or Control	*Description*
School Code	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.
Country and **State**	Enter the school country and state if the system does not automatically display them. If you select a different country code after you have already selected a state code, the system clears the value in the **State** field.

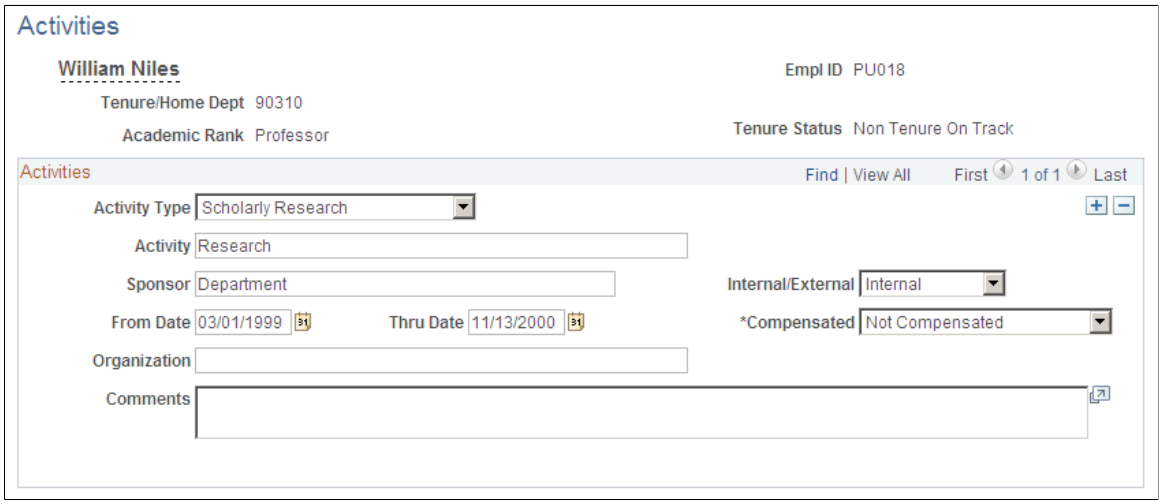
Activities Page

Use the Activities page (EG_ACTIVITIES) to track employees' research activities by type of academic activity, date, sponsor, and organization.

Navigation:

Workforce Development > **Faculty Events** > **Track Events** > **Activities** > **Activities**

This example illustrates the fields and controls on the Activities page.



Field or Control	*Description*
Compensated	Select *Comp* if the employee was compensated for the activity, or *No Comp* if the employee was not compensated.
Organization	Enter the name of the department or external organization where the activity took place.

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Faculty Administrative Posts Page

Use the Faculty Administrative Posts page (EG_ADMIN_POST_TBL) to set up administrative posts.

Navigation:

Set Up HCM > **Product Related** > **Workforce Development** > **Faculty Events** > **Faculty Administrative Posts** > **Faculty Administrative Posts**

Workforce Development > **Faculty Events** > **Define Faculty Events Data** > **Define Administrative Posts**

This example illustrates the fields and controls on the Faculty Administrative Posts page.

Field or Control	*Description*
Administrative Post	Enter the name of the administrative post, appointment, or title, such as *Chair*.
(E&G, CAN) 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.

Track Administrative Posts Page

Use the Track Administrative Posts page (EG_ADMIN_POSTS) to 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 Faculty Events - Administrative Posts page (EG_ADMIN_POST_TBL).

Navigation:

Workforce Development > **Faculty Events** > **Track Events** > **Track Administrative Posts** > **Track Administrative Posts**

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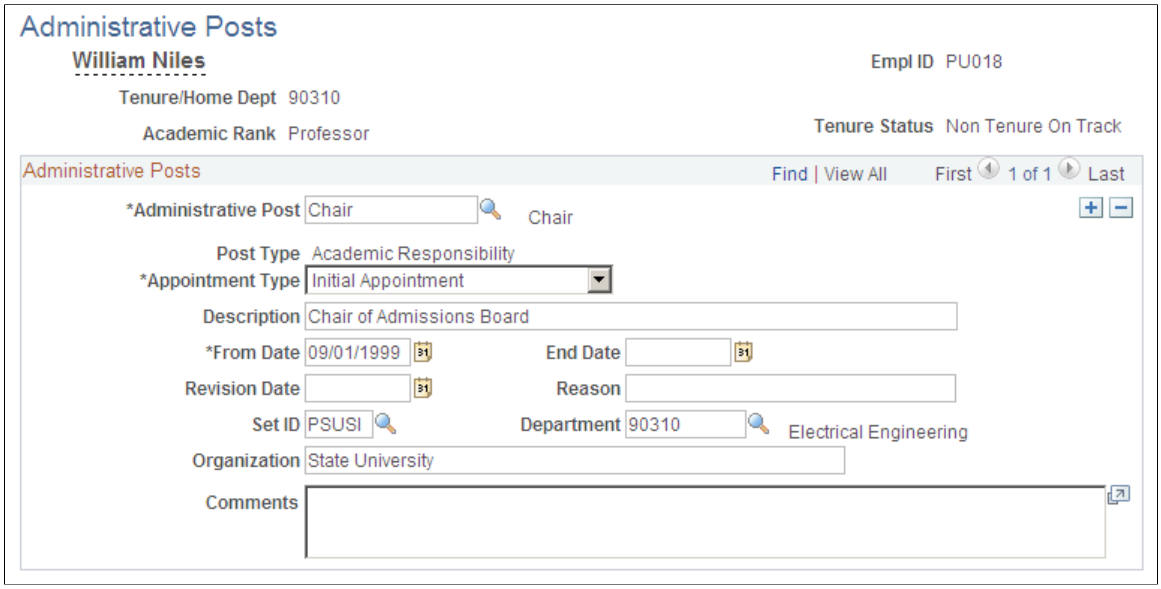
This example illustrates the fields and controls on the Track Events - Administrative Posts page.



Field or Control	*Description*
Administrative Post	Select an administrative post.
Appointment Type	Select the type of appointment.
Revision Date	Enter the date the administrative post changed.
Reason	Enter the reason the end date changed.
Department	Select the department in which the post is held.
Organization	Enter the internal or external organization in which the post was held.

Faculty Presentations Page

Use the Faculty Presentations page (EG_PRESENTATIONS) to track information about presentations given by employees.

Navigation:

Workforce Development > **Faculty Events** > **Track Events** > **Faculty Presentations** > **Faculty Presentations**

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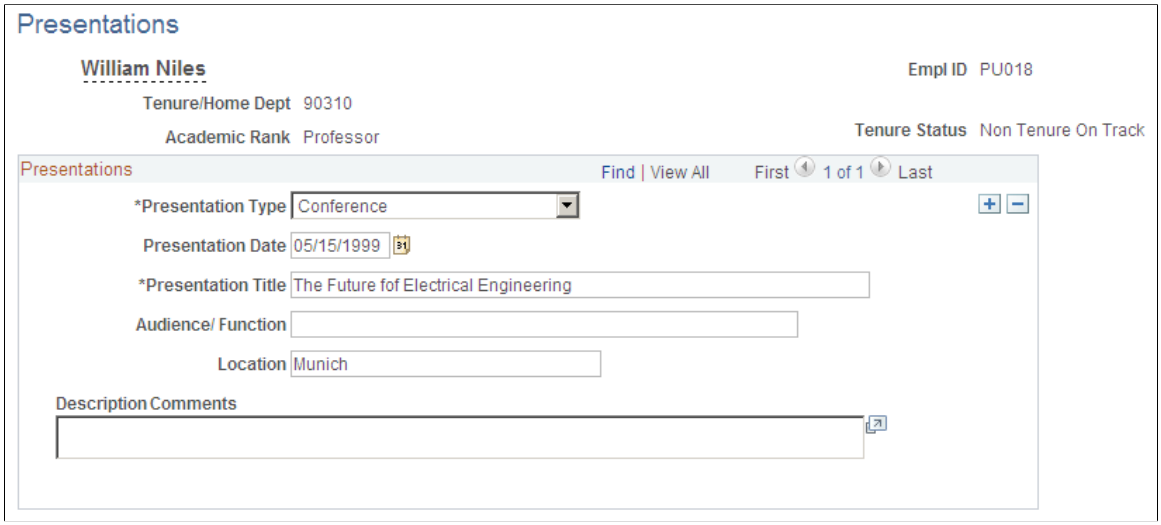
This example illustrates the fields and controls on the Faculty Presentations page.



Field or Control	*Description*
Presentation Type	Select the type of presentation the employee performed.

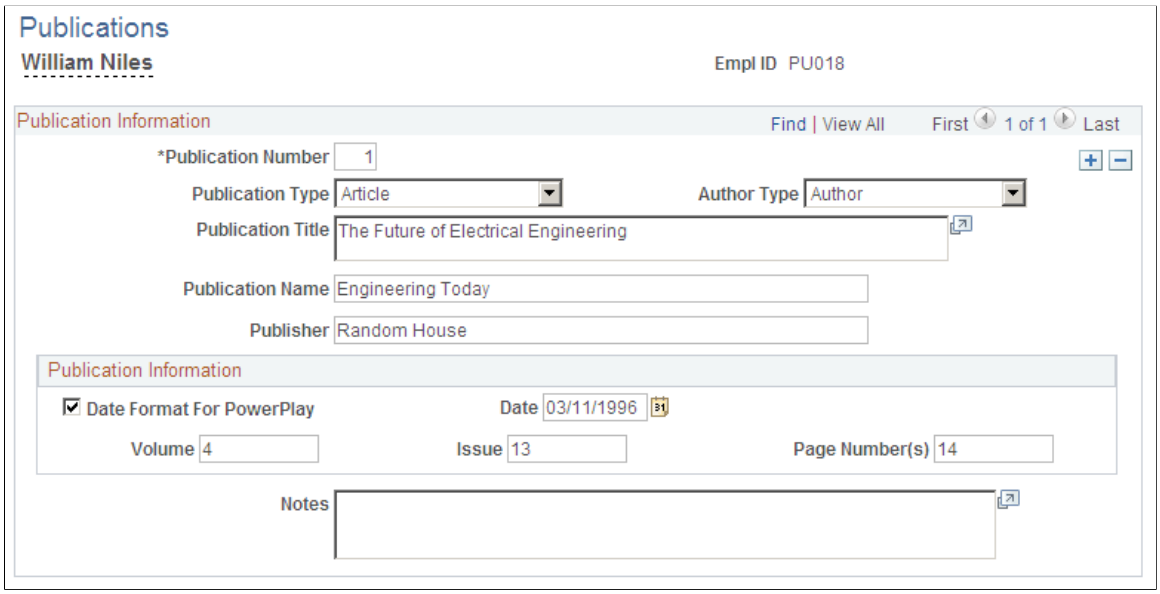
Faculty Publications Page

Use the Faculty Publications page (EG_PUBLICATIONS) to track information about the employees' published works.

Navigation:

Workforce Development > **Faculty Events** > **Track Events** > **Faculty Publications** > **Faculty Publications**

This example illustrates the fields and controls on the Faculty Publications page.



Field or Control	*Description*
Date Format For PowerPlay and **Date**	Select to enter the publication date in the format *MM/DD/YYYY*. Deselect this check box to enter only the year in the **Date** field.

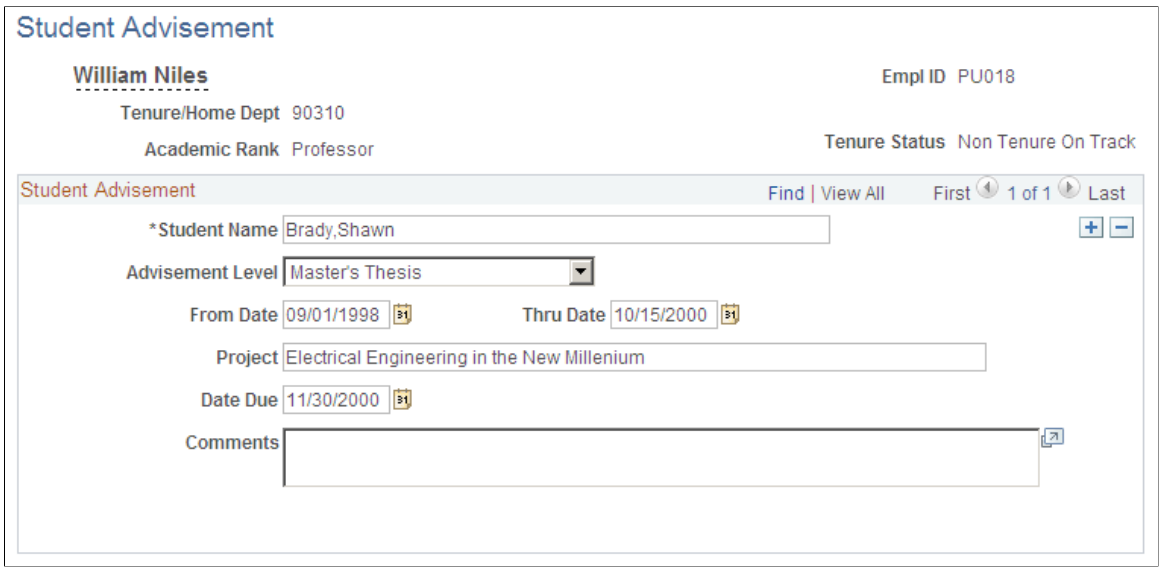
Student Advisement Activity Page

Use the Student Advisement Activity page (EG_ADVISEMENT) to track information about any advisement activities.

Navigation:

Workforce Development > **Faculty Events** > **Track Events** > **Student Advisement Activity** > **Student Advisement Activity**

This example illustrates the fields and controls on the Student Advisement Activity page.



Field or Control	*Description*
Student Name	Enter the student advisee's name in the following format: Last Name,First Name (no spaces).

Track Teaching Responsibility Page

Use the Track Teaching Responsibility page (EG_TEACHING_RESP) to track faculty teaching responsibilities.

Navigation:

Workforce Development > **Faculty Events** > **Track Events** > **Track Teaching Responsibility** > **Track Teaching Responsibility**

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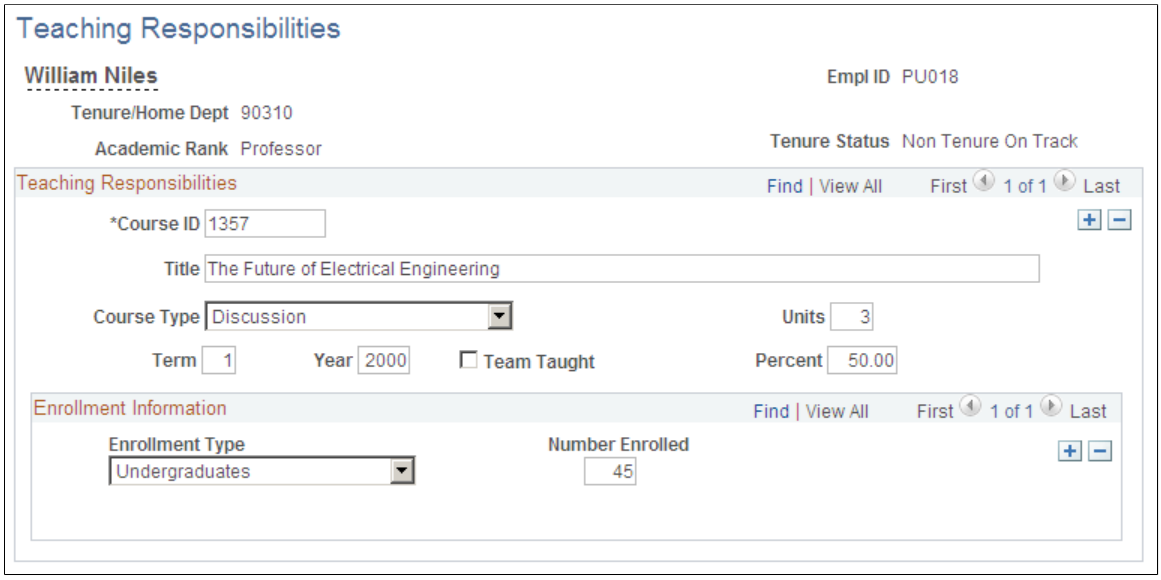
This example illustrates the fields and controls on the Track Teaching Responsibility page.



Field or Control	*Description*
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

To set up and track committees, use the Committee Type (EG_COMMITTEE_SETUP), Committees (EG_COMMITTEE_MAINT), and Review Committee Membership (EG_COMM_MBRS) components.

Pages Used to Track Committee Information

Page Name	*Definition Name*	*Usage*
Faculty-Committee Type Page	EG_COMMITTEE_TABLE	Maintain committee types and committee roles within each type.
Committee Page	EG_COMMITTEE	Establish a committee and attach a committee type.

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Page Name	*Definition Name*	*Usage*
Committee Members Page	EG_COMMITT_MEMBRS	Assign employees to a committee.
Review Committee Membership Page	EG_COMM_MBR_VW	View the committees to which an individual employee belongs. This page is display-only.

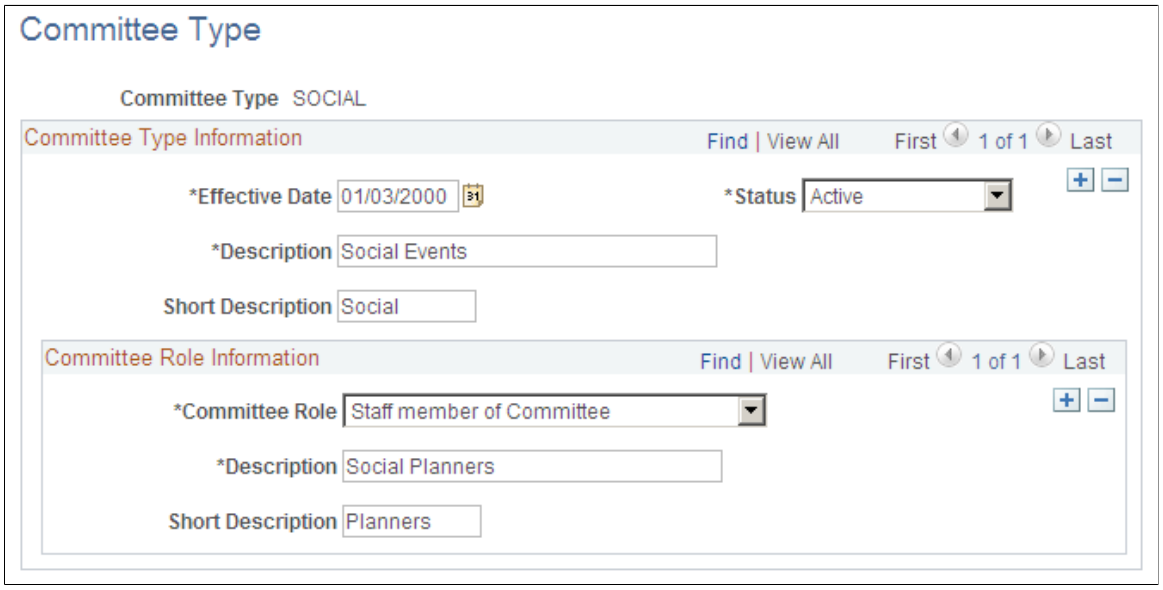
Faculty-Committee Type Page

Use the Faculty-Committee Type page (EG_COMMITTEE_TABLE) to maintain committee types and committee roles within each type.

Navigation:

- **Set Up HCM** > **Product Related** > **Workforce Development** > **Faculty Events** > **Faculty Event Committee Type** > **Faculty Event Committee Type**
- **Workforce Development** > **Faculty Events** > **Define Faculty Events Data** > **Committee Type** > **Faculty-Committee Type**

This example illustrates the fields and controls on the Committee Type page.



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Committee Role Information

Field or Control	*Description*
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.

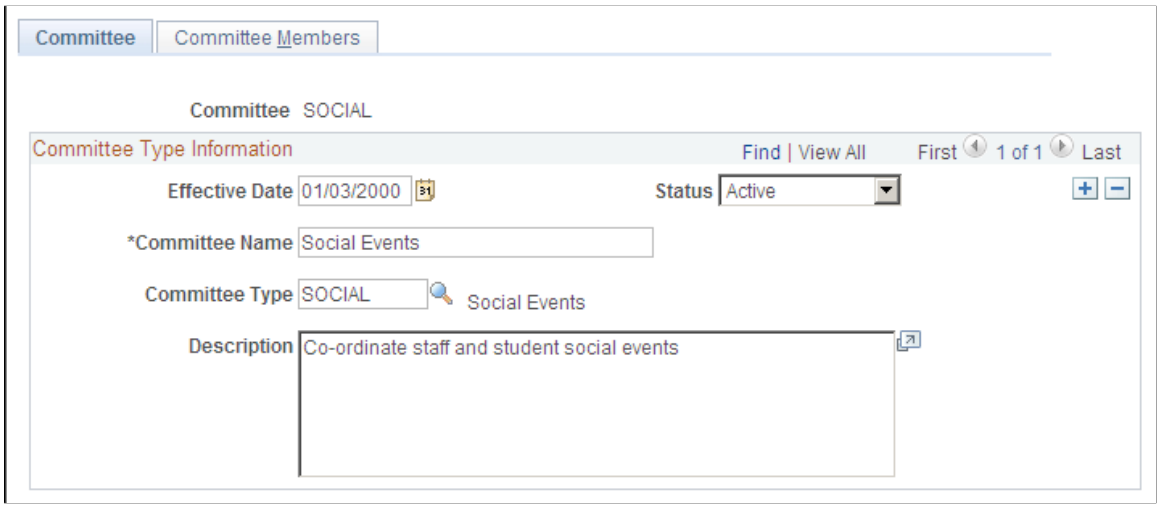
Committee Page

Use the Committee page (EG_COMMITTEE) to establish a committee and attach a committee type.

Navigation:

- **Set Up HCM** > **Product Related** > **Workforce Development** > **Faculty Events** > **Faculty Event Committees** > **Committee**
- **Workforce Development** > **Faculty Events** > **Define Faculty Events Data** > **Faculty Event Committees** > **Committee**

This example illustrates the fields and controls on the Committee page.



Committee Type Information

Field or Control	*Description*
Committee Type	Select the type of committee, such as *Social, Research,* or *Education.*

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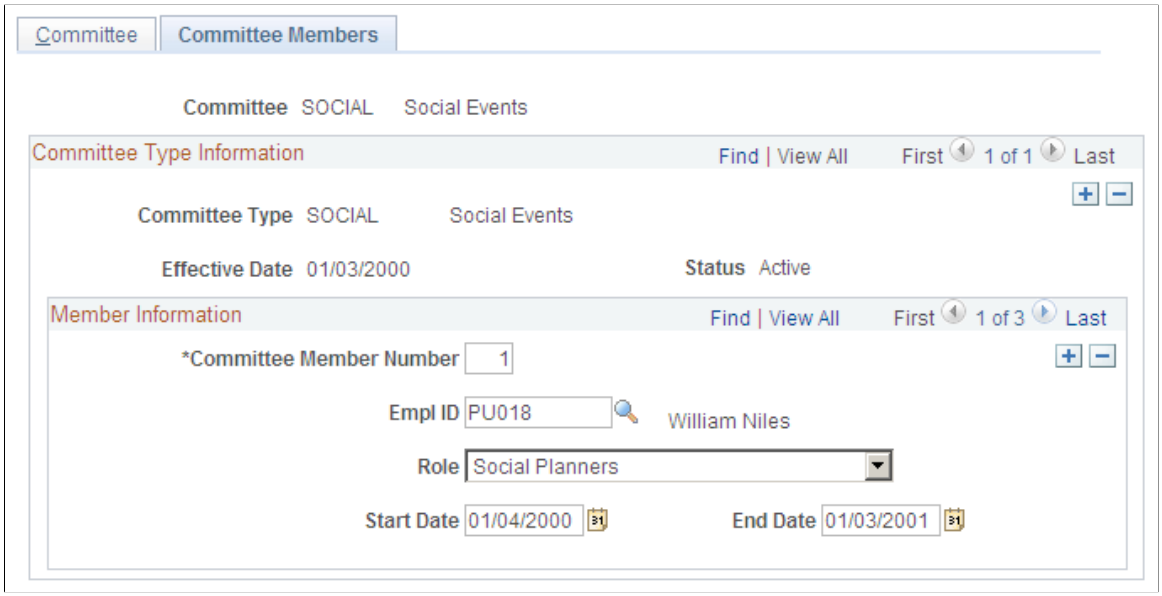
Committee Members Page

Use the Committee Members page (EG_COMMITT_MEMBRS) to assign employees to a committee.

Navigation:

- **Set Up HCM** > **Product Related** > **Workforce Development** > **Faculty Events** > **Committees** > **Committee Members**
- **Workforce Development** > **Faculty Events** > **Define Faculty Events Data** > **Committees** > **Committee Members**

This example illustrates the fields and controls on the Committee Members page.



Member Information

Field or Control	*Description*
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.

Review Committee Membership Page

Use the Review Committee Membership page (EG_COMM_MBR_VW) to view the committees to which an individual employee belongs.

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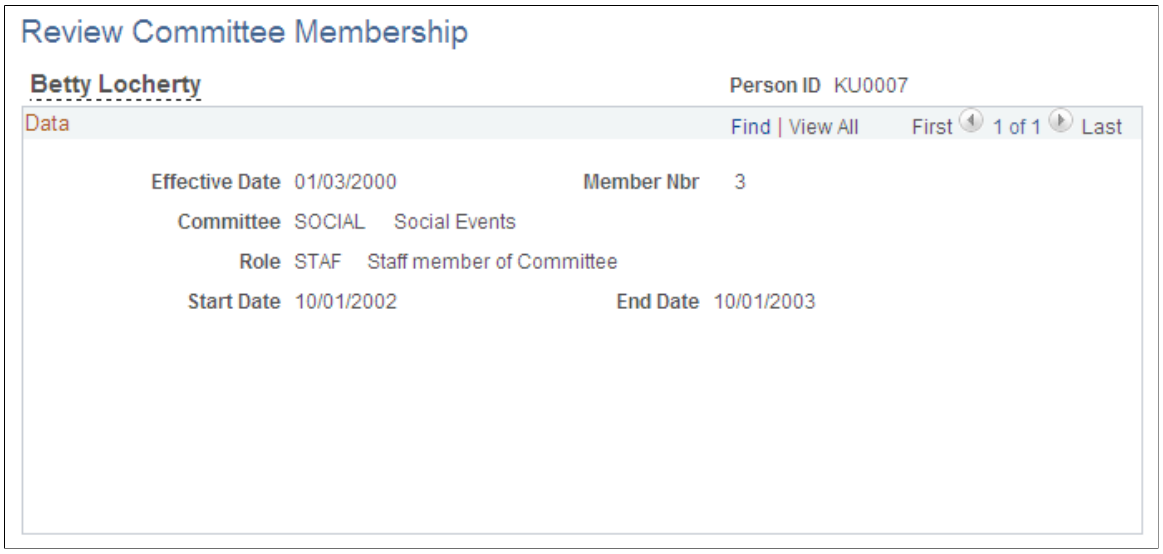
This page is display-only.

Navigation:

Workforce Development > Faculty Events > Track Events > Review Committee Membership > Review Committee Membership

This example illustrates the fields on the Review Committee Membership page.



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Chapter 5

Managing Cases

Defining and Reviewing Employee Cases

This topic discusses how to define and review employee cases.

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.

Pages Used to Define and Review Employee Cases

Page Name	*Definition Name*	*Usage*
Faculty Employee Case Page	EG_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.
Faculty Case Information Page	EG_REVIEW_PATH	Review case information by selecting the employee and the case ID that you want to review.
Faculty Case Progress Page	EG_CASE_REVIEW_VW	View the less sensitive information from the Identify Employee Case and Case Information pages. This page is display only.
Review Approved Cases Page	EG_CASE_FIN_VW	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 History Report Page	RUNCTL_EVENTS	List all tracking events for the employee specified, including activities, administrative posts, appointments and titles, education, training and so on.

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Common Elements Used to Define and Review Employee Cases

Field or Control	*Description*
Tenure/Home Dept (tenure and home department)	Displays the employee's home department from the Tenure Data page or the Job Data component.
Academic Rank	Displays the employee's current academic rank from the Tenure Data page.

Faculty Employee Case Page

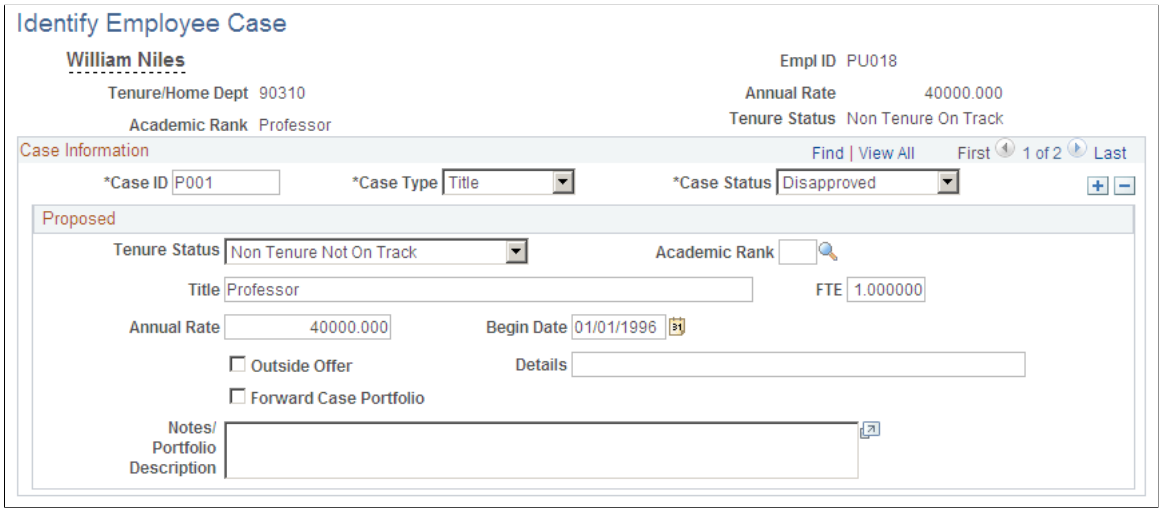
Use the Faculty Employee Case page (EG_CASE_REVIEW) to define an employee case.

For example, a case could involve a decision to give a faculty member a change in tenure status, or a title change.

Navigation:

Workforce Development > **Faculty Events** > **Manage Cases** > **Faculty Employee Case** > **Faculty Employee Case**

This example illustrates the fields and controls on the Identify Employee Case page.



Case Information

Field or Control	*Description*
Case ID (case identification)	Enter a unique case identification number for the employee.

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Proposed

Field or Control	*Description*
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.

Faculty Case Information Page

Use the Faculty Case Information page (EG_REVIEW_PATH) to review case information by selecting the employee and the case ID that you want to review.

Navigation:

Workforce Development > **Faculty Events** > **Manage Cases** > **Faculty Case Information** > **Faculty Case Information**

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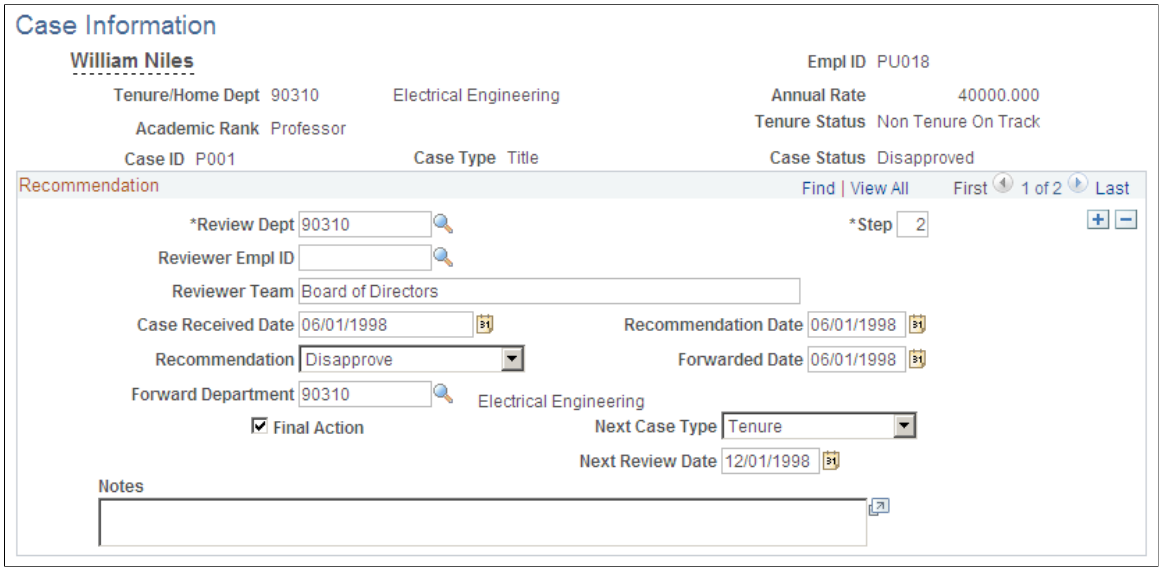
This example illustrates the fields and controls on the Case Information page.



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

Recommendation

Field or Control	*Description*
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.

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Field or Control	*Description*
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.

Faculty Case Progress Page

Use the Faculty Case Progress page (EG_CASE_REVIEW_VW) to view the less sensitive information from the Identify Employee Case and Case Information pages.

This page is display only.

Navigation:

Workforce Development > **Faculty Events** > **Manage Cases** > **Faculty Case Progress** > **Faculty Case Progress**

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This example illustrates the fields on the Faculty Case Progress page.

View the less sensitive information from the Identify Employee Case and Case Information pages. This page is display only.

Review Approved Cases Page

Use the Review Approved Cases page (EG_CASE_FIN_VW) to 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.

Navigation:

Workforce Development > **Faculty Events** > **Manage Cases** > **Review Approved Cases** > **Review Approved Cases**

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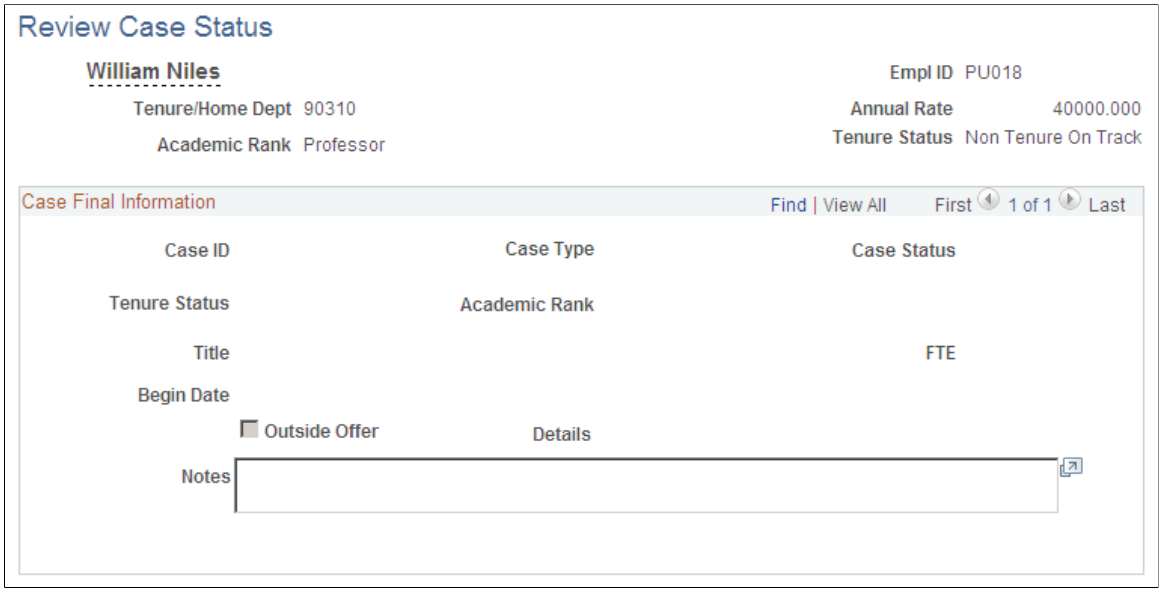
This example illustrates the fields on the Review Approved Cases page.



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.

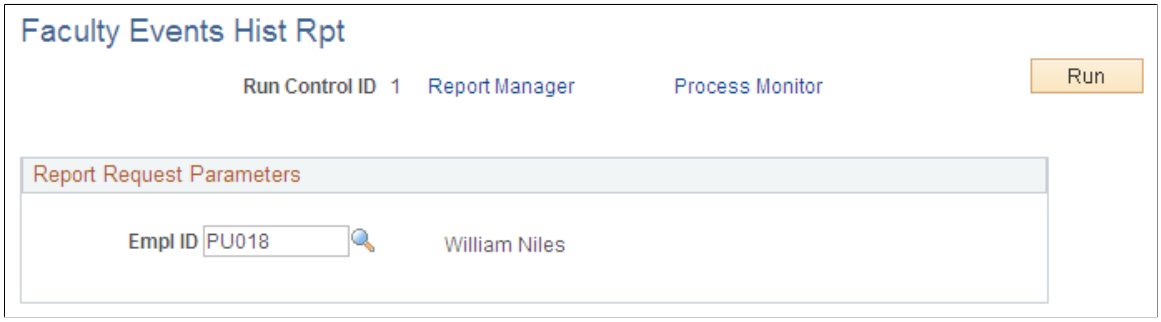
Faculty Events History Report Page

Use the Faculty Events History Report (family events history report) page (RUNCTL_EVENTS) to list all tracking events for the employee specified, including activities, administrative posts, appointments and titles, education, training and so on.

Navigation:

Workforce Development > **Faculty Events** > **Track Events** > **Faculty Events History Report** > **Faculty Events History Report**

This example illustrates the Faculty Events History Report page.



Field or Control	*Description*
Run Control ID	Displays the Run Control ID associated with the report format that you selected to access the page.

Field or Control	*Description*
Run	Select this button to process the Faculty Events History report. The report displays all of the event history for the employee you selected.

Report Request Parameters

Field or Control	*Description*
EmplID	Enter the employee ID for the faculty member for whom you are generating an event history report.

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Chapter 6

(CAN) Working with the University and College Academic Staff System (UCASS) Survey Process

Understanding the University and College Academic Staff System (UCASS) Survey Business Process

The Track Faculty Events business process provides the functionality to create the legislatively required Academic Teaching Survey reports by associating PeopleSoft HCM information with Statistics Canada codes. Before you create academic teaching surveys, you must set up some other HR tables that are described below.

This topic discusses:

- Setting up PeopleSoft HR control tables.
- Setting up Track Faculty Events tables.

Setting Up PeopleSoft HCM Control Tables

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

- Department Table: StatsCan - Dept (Statistics Canada Department) and StatsCan - Faculty.

  Maintains StatsCan values in the Faculty Code Stats CAN table.

- Job Code component: StatsCan Teaching Survey Codes.
- Company Table: StatsCan Institution Code.
- Country Table: Statistics Canada Location Code.

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

- Canadian Tax Table: StatsCan Province Code.

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

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

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Related Links

"Setting Up Implementation Defaults" (Application Fundamentals)

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.

Related Links

Academic Rank Page
Faculty Administrative Posts Page

Setting Up the University and College Academic Staff System (UCASS) Survey Business Process

To set up the University and College Academic Staff System (UCASS) survey, use the Principal Subjects Taught CAN (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.

Pages Used to Set Up the Canadian Teaching Surveys Business Process

Page Name	*Definition Name*	*Usage*
Principal Subjects Taught CAN Page	HP_STATS_SUBJECTS	Maintain Statistics Canada principal subjects taught codes and descriptions.
Stats-CAN Dept CIP Page	HP_STATS_CIP_CODE	Store Classification of Instructional Programs (CIP) codes. The Department Table references this table to associate a department with a CIP code. For reporting periods that start after October 1, 2009, the system uses this code for the department when you load data into the Academic Teaching Survey Tables.

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Page Name	*Definition Name*	*Usage*
Faculty Code Stats CAN Page	HP_STATS_FACULTY	Store information regarding faculty codes. The Department Table references this table to associate a faculty with a department. For reporting periods that start before October 1, 2009, the system uses this code for the department when you load data into the Academic Teaching Survey Tables.
Non-Operational Fund Table Page	HP_NON_OP_FUNDS	Identify non-operational funding sources. This table is for Ontario Universities only.
Reporting Period Stats CAN Page	HP_RPTNG_PRD_PNL	Create and maintain report period dates and parameters for the survey run controls. Update the reporting period each reporting year.

Principal Subjects Taught CAN Page

Use the Principal Subjects Taught CAN page (HP_STATS_SUBJECTS) to maintain Statistics Canada principal subjects taught codes and descriptions.

Navigation:

Set Up HCM > **Product Related** > **Workforce Development** > **Faculty Events** > **Principal Subjects Taught CAN** > **Principal Subjects Taught CAN**

This example illustrates the Principal Subjects Taught CAN page.

Field or Control	*Description*
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.

Stats-CAN Dept CIP Page

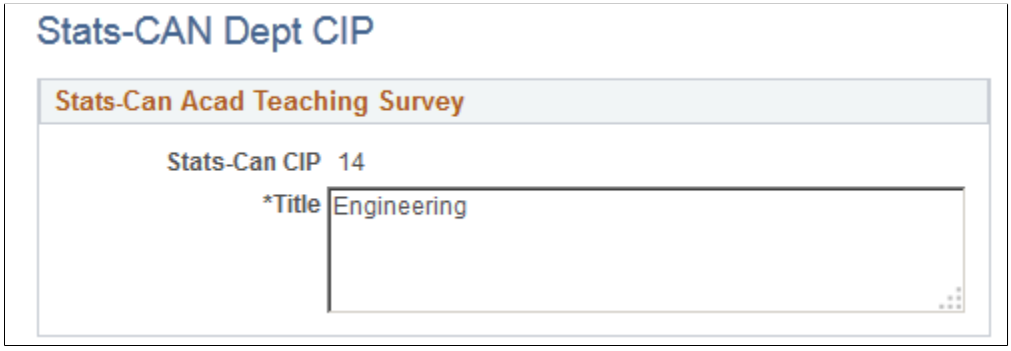
Use the Stats-CAN Dept CIP page (Statistics Canada Department Classification of Instructional Programs page) to store CIP codes.

For reporting periods that start after October 1, 2009, the system uses this code for the department when you load data into the Academic Teaching Survey Tables.

Navigation:

Set Up HCM > **Product Related** > **Workforce Development** > **Faculty Events** > **Stats-CAN Dept CIP** > **Stats-CAN Dept CIP**

This example illustrates the Stats-CAN Dept CIP page.



Faculty Code Stats CAN Page

Use the Faculty Code Stats CAN (faculty code Statistics Canada) page (HP_STATS_FACULTY) to store information regarding faculty codes.

The Department Table references this table to associate a faculty with a department.

For reporting periods that start before October 1, 2009, the system uses this code for the department when you load data into the Academic Teaching Survey Tables.

Navigation:

Set Up HCM > **Product Related** > **Workforce Development** > **Faculty Events** > **Faculty Code Stats CAN** > **Faculty Code Stats CAN**

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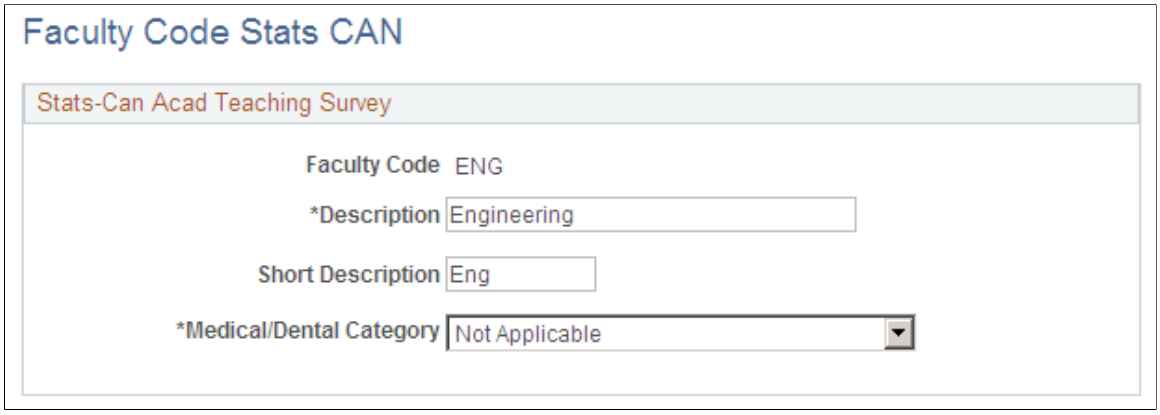
This example illustrates the Faculty Code Stats CAN page.



Field or Control	*Description*
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.

Non-Operational Fund Table Page

Use the Non-Operational Fund Table page (HP_NON_OP_FUNDS) to identify non-operational funding sources.

This table is for Ontario Universities only.

Navigation:

Set Up HCM > **Product Related** > **Commitment Accounting** > **Fringe Costs** > **Non-Operational Fund Table CAN** > **Non-Operational Fund Table**

This example illustrates the Non-Operational Fund Table page.

Field or Control	*Description*
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).

Reporting Period Stats CAN Page

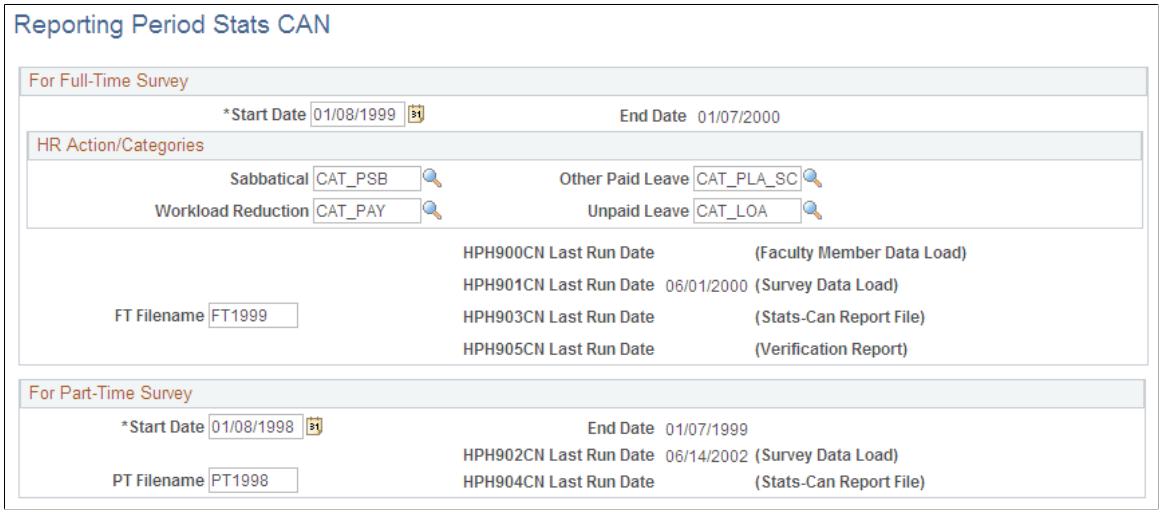
Use the Reporting Period Stats CAN (reporting period Statistics Canada) page (HP_RPTNG_PRD_PNL) to create and maintain report period dates and parameters for the survey run controls.

Update the reporting period each reporting year.

Navigation:

Set Up HCM > **Product Related** > **Workforce Development** > **Faculty Events** > **Reporting Period Stats CAN** > **Reporting Period Stats CAN**

This example illustrates the fields and controls on the Reporting Period Stats CAN page.



For Full-Time Survey

Field or Control	*Description*
Start Date and **End Date**	Enter the start date of the report period for the full-time survey. There are different report layouts for start dates before October 1, 2009 and for start dates equal to or after that date. The system calculates the end date to be one day less than a year from the start date.

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HR Action/Categories

Field or Control	*Description*
Sabbatical, Other Paid Leave, Workload Reduction, and **Unpaid Leave**	Select the HR 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

Field or Control	*Description*
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.

Related Links

"Employment Information Page" (PeopleSoft Human Resources Administer Workforce)

Loading and Modifying Data in the FT Academic Teaching Member Table

This topic provides an overview of the Load FT Teaching Member Data process.

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

Page Name	*Definition Name*	*Usage*
Load FT Teaching Member Data Page	RUNCTL_HPH900CN	Load teaching member data into the FT Academic Teaching Member Table.

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Page Name	*Definition Name*	*Usage*
Full-Time Member Page	HP_FT_TEACH_MEMBER	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).

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. Employees without records in the FT Academic Teaching Member Table for the year being reported do not appear in the FT survey report.

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

Part-time employees do not have a corresponding table.

Important! The first time you use the University and College Academic Staff System (UCASS) survey 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.

Load FT Teaching Member Data Page

Use the Load FT Teaching Member Data (load full-time teaching member data) page (RUNCTL_HPH900CN) to load teaching member data into the FT Academic Teaching Member Table.

Navigation:

Workforce Development > **Faculty Events** > **Load Teaching Data CAN** > **Load FT Teaching Member Data** > **Load FT Teaching Member Data**

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This example illustrates the fields and controls on the Load FT Teaching Member Data page.

Field or Control	*Description*
Reporting Period	Displays the year of the data to load into the FT Academic Teaching Member Table. Maintain reporting periods on the Report Period page.
Start Date and **End Date**	Displays the start and end dates of the employment year used to assess twelve months of employment and compensation amounts. The system calculates the end date to be one day less than a year from the start date. Maintain start dates on the Report Period page.

Related Links

"Work Location Page" (PeopleSoft Human Resources Administer Workforce)

Full-Time Member Page

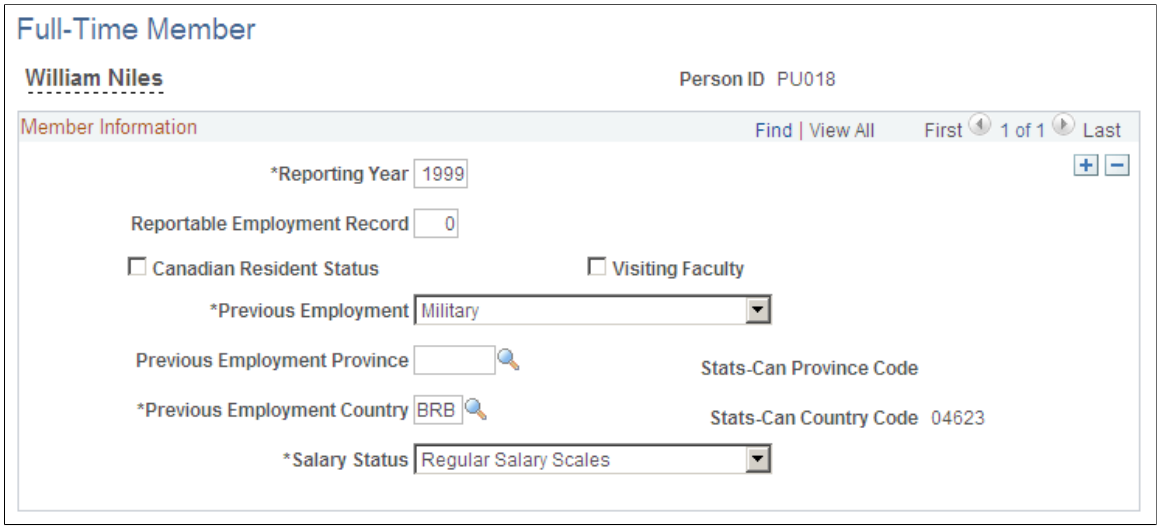
Use the Full-Time Member page (HP_FT_TEACH_MEMBER) to modify teaching member records to control the survey results.

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).

Navigation:

Workforce Development > **Faculty Events** > **Qualify Academic Teaching CAN** > **Full-Time Member** > **Full-Time Member**

This example illustrates the fields and controls on the Full-Time Member page.



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

Field or Control	*Description*
Reporting Year	Displays the year of the data that appears in the survey. If you manually add a new teaching member record, you must enter the reporting year.
Reportable Employment Rcd Nbr (reportable employment record number)	Enter the number of the employment record for the primary FT job being reported. If you loaded the information for this teaching member using the Load FT Teaching Member Data page, this value comes from the Statistics Canada Academic Teaching Employment Table.
Canadian Resident Status	Select this check box if the employee had Canadian resident status at the time of job offer.
Visiting Faculty	Select this check box if the employee is a visiting faculty member.
Previous Employment	Different options are available depending on the reporting year. Years up to and including 2008 have one set of options, and years 2009 and later have a reduced set of options.
Previous Employment Province	If the country of the employee's previous employment is Canada, select the province of previous employment.
Previous Employment Country	If the country of the employee's previous employment is not Canada, select the country of previous employment.

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Loading Data Into the Academic Teaching Survey Tables

This topic provides an overview of the Load Teaching Survey Data process, lists common elements, and discuss how to load FT survey data.

Pages Used to Load Data Into the Academic Teaching Survey Tables

Page Name	*Definition Name*	*Usage*
FT Survey Page	RUNCTL_HPH901CN	Load FT survey data for each FT employee who qualifies. Before using this page, complete the Member Data Table for all FT teaching members in the survey.
PT Survey (part-time survey) Page	RUNCTL_HPH902CN	Load PT survey data for each PT employee who qualifies. Before using this page, set up the Statistics Canada Academic Teaching Employment table.

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.

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- Has a Statistics Canada reporting job (the value of the Survey Report Flag field in the Statistics Canada Academic Teaching Employment table 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 (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*).

Note: The part-time survey has not been required by Statistics Canada since 2004 however PeopleSoft retained the functionality. Recent change to data elements starting in academic year 2009/2010 were not applied to the part-time survey.

Common Elements Used in the Load Teaching Survey Data Process

Field or Control	***Description***
Reporting Period	Displays the year of the data to load into the FT or PT Academic Teaching Survey Tables.
Start Date and **End Date**	Displays the start and end dates of the employment year used to assess twelve months of employment and compensation amounts. The system calculates the end date to be one day less than a year from the start date.

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Field or Control	*Description*
EmpID (employee identification)	Enter an employee ID to create an Academic Teaching Survey record for a specific employee.

FT Survey Page

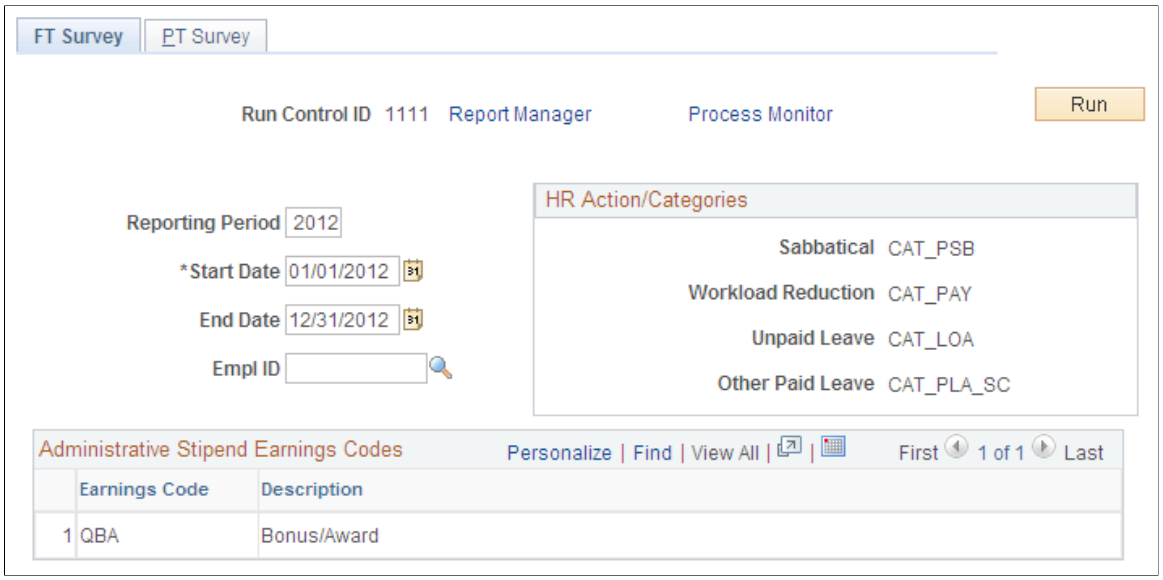
Use the FT Survey (full-time survey) page (RUNCTL_HPH901CN) to load FT survey data for each FT employee who qualifies.

Before using this page, complete the Member Data Table for all FT teaching members in the survey.

Navigation:

Workforce Development > **Faculty Events** > **Load Teaching Data CAN** > **Load Teaching Survey Data** > **FT Survey**

This example illustrates the fields and controls on the FT Survey page.



HR/Action Categories

Field or Control	*Description*
Sabbatical, Workload Reduction, Unpaid Leave and **Other Paid Leave**	Displays the HR Action/Categories from the Reporting Period Stats CAN page.
Earnings Code	Displays the earnings code used to pay annual stipends, or other honoraria for administrative duties.

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Viewing and Modifying Survey Results

This topic lists common elements and discusses how to view and modify academic teaching survey results.

Pages Used to View and Modify Academic Teaching Survey Results

Page Name	*Definition Name*	*Usage*
FT Survey Part 1 Page	HP_FT_SURVEY_PNL1	View survey results for each FT employee. Before using this page, set up the Load Teaching Survey Data - FT Survey page.
FT Survey Part 2 Page	HP_FT_SURVEY_PNL2	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 Page	HP_PT_SURVEY_PNL1	View survey results for each PT employee. Before using this page, set up the Load Teaching Survey Data - PT Survey page.
PT Survey Part 2 Page	HP_PT_APPNTMNT_PNL	View and modify survey results for each PT employee.

Common Elements Used to View and Modify Academic Teaching Survey Results

Field or Control	*Description*
Reporting Year	Maintain reporting periods on the Report Period page.
Level of Highest Degree	Displays the Statistics Canada degree level from the Professional 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 Training page.

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FT Survey Part 1 Page

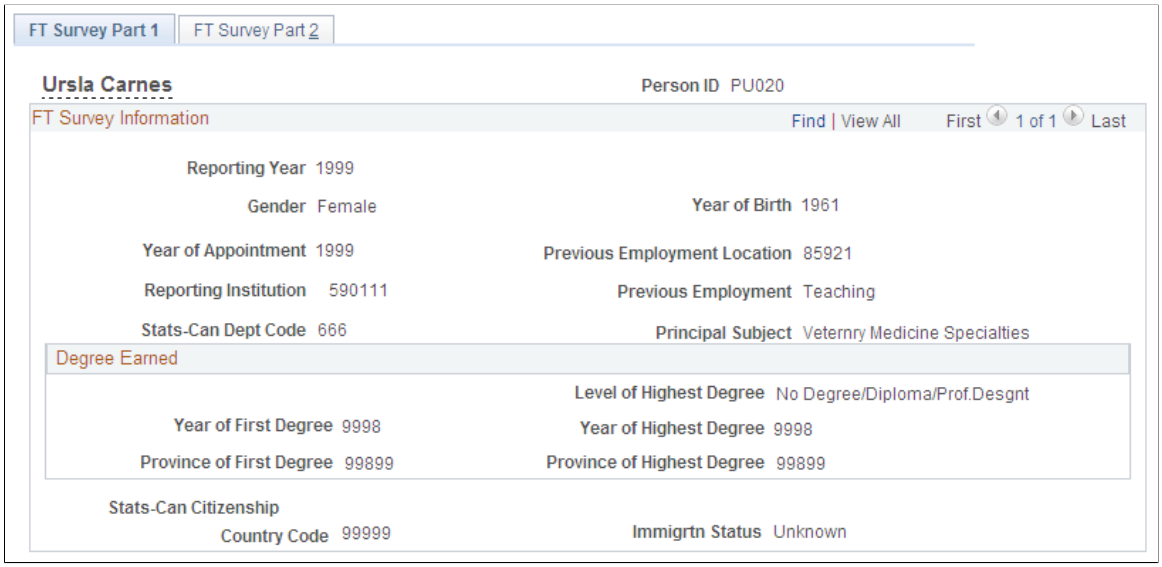
Use the FT Survey Part 1 (full-time survey part 1) page (HP_FT_SURVEY_PNL1) to view survey results for each FT employee.

Before using this page, set up the Load Teaching Survey Data - FT Survey page.

Navigation:

Workforce Development > **Faculty Events** > **Qualify Academic Teaching CAN** > **Full-Time Surveys** > **FT Survey Part 1**

This example illustrates the fields on the FT Survey Part 1 page.



Note: You can also use Profile Management to capture degree information for employees.

See the PeopleSoft Human Resources Manage Profiles product documentation.

FT Survey Information

Field or Control	*Description*
Year of Appointment	Displays the first year the employee appeared in the survey report. If the employee was not reported for a year or more, this field displays the first year the employee resumed reporting.
Previous Employment Location	Displays the employee's previous employment location from the Full-Time Member page.
Reporting Institution	Displays the Statistics Canada reporting institution from the Company Table.

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Field or Control	*Description*
Previous Employment	Displays the employee's previous employment from the Full-Time Member page.
Stats-Can Dept Code (Statistics Canada department code)	Displays the Statistics Canada code associated with the department of the primary reported job from the Department Table.

Degree Earned

Field or Control	*Description*
Year of First Degree	Displays the year the employee received his or her first degree from the Professional Training page.
Province of First Degree	Displays the province in which the employee received his or her first degree from the Professional Training page.
Province of Highest Degree	Displays the province in which the employee received his or her highest degree from the Professional Training page.
Stats-Can Citizenship Country Code(Statistics Canada citizenship country code)	Displays the Statistics Canada citizenship country code associated with the employee's country of citizenship from the Citizenship/Passport page. Maintain country codes in the Country Table.
Immigrtn Status (immigration status)	Displays the employee's immigration status from the Membership Data page.

FT Survey Part 2 Page

Use the FT Survey Part 2 (full-time survey part 2) page (HP_FT_SURVEY_PNL2) to 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.

Navigation:

Workforce Development > **Faculty Events** > **Qualify Academic Teaching CAN** > **Full-Time Surveys** > **FT Survey Part 2**

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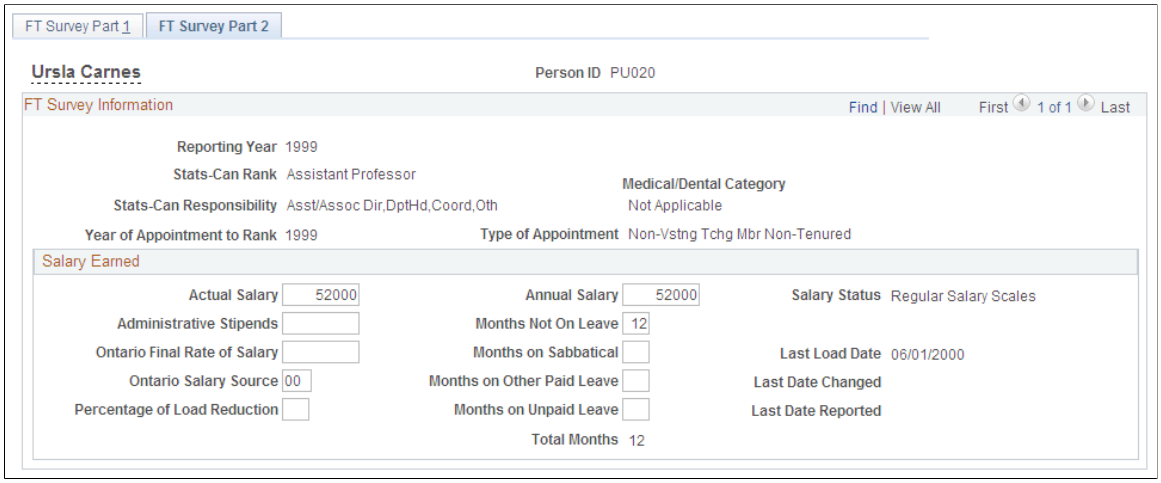
This example illustrates the fields on the FT Survey Part 2 page.



Field or Control	*Description*
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.
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 Full-Time Member page and the Tenure Status field in the Tenure Data page.

Salary Earned

Field or Control	*Description*
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. The salary does not include administrative stipends or salary increases effective after October 1 of the reporting year. The system uses decimal months to calculate actual salary, which may result in skewed figures. You can modify this field.

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Field or Control	*Description*
Annual Salary	Displays the actual salary. If the employee has not had a reduced workload and has been working for the entire 12 months of the reporting year, the Annual Salary is the same as the actual salary. The salary does not include administrative stipends or salary increases effective after October 1 of the reporting year.
Salary Status	Displays the salary status from the Full-Time Member page.
Administrative Stipends	Displays the amount paid for stipends and honoraria for administrative duties for the reporting year, based on job earnings distribution records. The system uses decimal months to calculate administrative stipends, which may result in skewed figures. You can modify this field.
Ontario Final Rate of Salary	Displays the final rate of salary for Ontario-based institutions, based on the annual salary and administrative stipends.
Ontario Salary Source	Displays the salary source for Ontario-based institutions, based on the job earnings distribution amounts distributed to non-operational funding accounts, excluding administrative stipend amounts.
Percentage of Load Reduction	Displays the percentage by which an employee's workload has been reduced, based on the Std Hrs (standard hours) in the Job Data and the Job Code components. The system calculates this value as follows: The job data standard hours divided by the job code standard hours multiplied by the number of reduced workload decimal months divided by the number of decimal months in the appointment. $\left(\frac{\text{Job Data Std Hrs}}{\text{Job Code Std Hrs}}\right) \times \left(\frac{\text{Number of Reduced Workload Decimal M}}{\text{Number of Decimal Months in Appoint}}\right.$
Months Not On Leave, Months On Sabbatical, Months On Other Paid Leave, and **Months On Unpaid Leave**	Displays the number of months the employee was on this type of leave during the reporting year, based on the Action/Reason field in the Job Data component and the HR Action/Categories on the Reporting Period Stats CAN page.

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Related Links

"Employment Information Page" (PeopleSoft Human Resources Administer Workforce)

PT Survey Part 1 Page

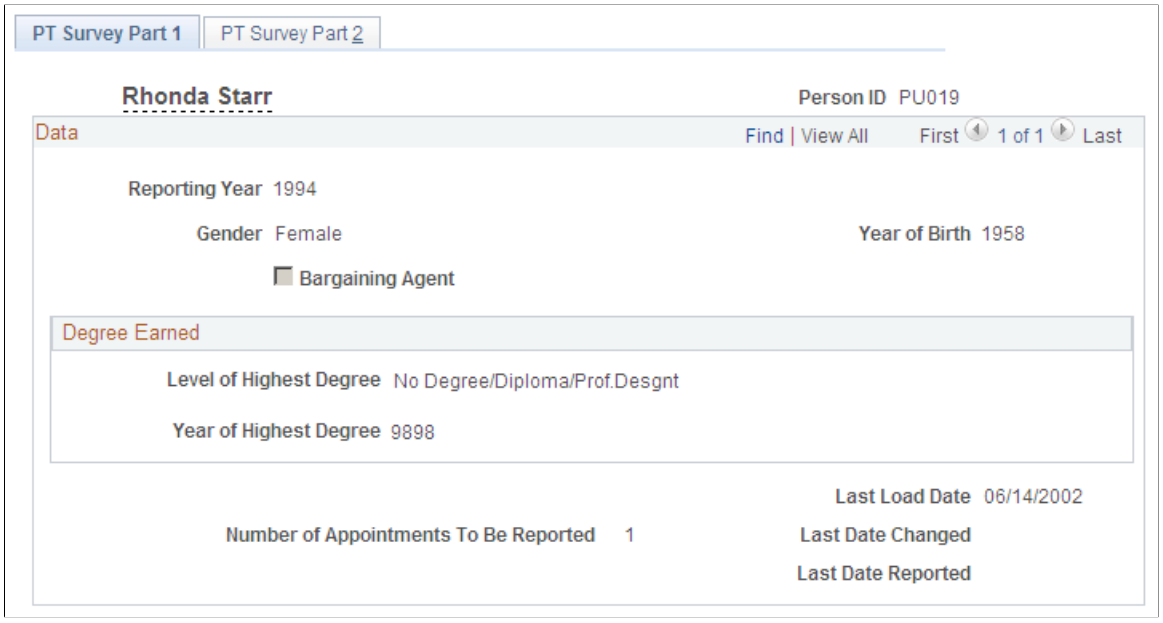
Use the PT Survey Part 1 (part-time survey part 1) page (HP_PT_SURVEY_PNL1) to view survey results for each PT employee.

Before using this page, set up the Load Teaching Survey Data - PT Survey page.

Navigation:

Workforce Development > **Faculty Events** > **Qualify Academic Teaching CAN** > **Part-Time Surveys** > **PT Survey Part 1**

This example illustrates the fields on the PT Survey Part 1 page.



Field or Control	*Description*
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.

PT Survey Part 2 Page

Use the PT Survey Part 2 (part-time survey part 2) page (HP_PT_APPNTMNT_PNL) to view and modify survey results for each PT employee.

Navigation:

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Workforce Development > Faculty Events > Qualify Academic Teaching CAN > Part-Time Surveys > PT Survey Part 2

This example illustrates the fields on the PT Survey Part 2 page.

Field or Control	*Description*
Work Duration Start Date	If the job compensation frequency is contract, this field displays the contract effective date from the Contract Data page. If the job is not contract, this field displays the hire date from the Job Data Table (or the rehire date if the same employment record is used for successive appointments).
End Date	If the job compensation frequency is contract, this field displays the contract end date from the Contract Data page. If the job is not contract, this field displays the employment termination date or the appointment end date from the Job Data component.
Appointment Status	Displays the employee's appointment status from the Job Data component. Values include: *1:* Full-time appointment working less than 12 months in the reporting period. *2:* Part-time appointment. *3:* Overload appointment of less than 12 months where the employee appeared in the FT survey report for the same reporting year as the PT survey report.

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Field or Control	*Description*
Type of Appointment	Displays the type of appointment, based on the tenure status on the Tenure Data page and the duties in the Statistics Canada Academic Teaching Employment table.
Principal Subject	Displays the principal subject taught by the employee from the Statistics Canada Academic Teaching Employment table. This is the Principal Subject taught as of the appointment end date.
Salary Paid	Displays the salary paid, based on the compensation and Job Earnings Distribution information from the reporting year. The salary paid amount includes contracts, leaves, and reduced workloads. The system uses decimal months to calculate salary paid, which may result in skewed figures. You can modify this field.
Stats Can Teaching Load	Displays the employee's Statistics Canada teaching load from the Statistics Canada Academic Teaching Employment table.
Full-Time Teaching Equivalent	Displays the employee's FT teaching equivalent from the Statistics Canada Academic Teaching Employment table.

Related Links

“Employment Information Page” (PeopleSoft Human Resources Administer Workforce)

Creating the Survey Report Flat Files

This topic lists common elements and pages used to create the survey report flat files.

Pages Used to Create the Survey Report Flat Files

Page Name	*Definition Name*	*Usage*
FT Report File Page (full-time report file)	RUNCTL_HPH903CN	Create the FT survey report flat file.
PT Report File Page (part-time report file)	RUNCTL_HPH904CN	Create the PT survey report flat file.

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Common Elements Used to Create the Survey Report Flat Files

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

FT Report File Page

Use the FT Report File page (RUNCTL_HPH903CN) to create the full time survey report flat file.

Navigation:

Workforce Development, Faculty Events > Load Teaching Data CAN > Create Survey Stats CAN > FT Report File

This example illustrates the fields and controls on the FT Report File page.

PT Report File Page

Use the PT Report File page (RUNCTL_HPH904CN) to Create the part time survey report flat file.

Navigation:

Workforce Development, Faculty Events > Load Teaching Data CAN > Create Survey Stats CAN > PT Report File

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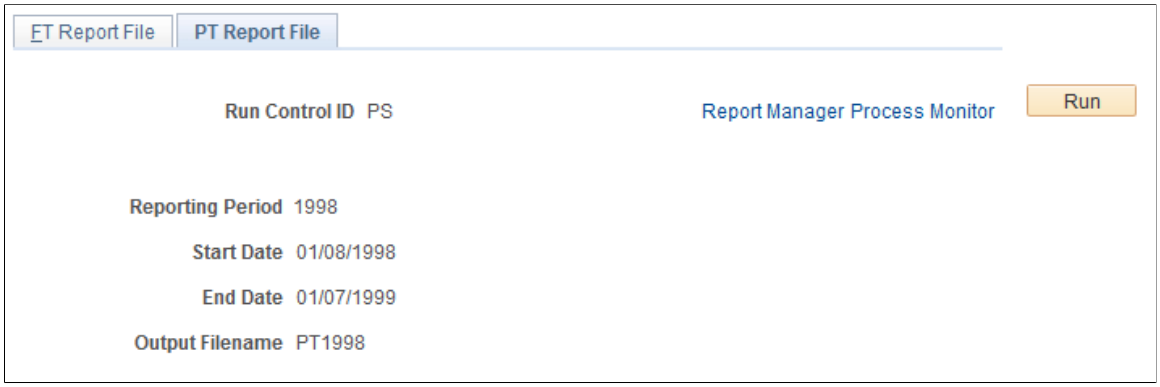
This example illustrates the fields and controls on the PT Report File page.



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	*Definition Name*	*Usage*
FT Survey Stats CAN Rpt (full-time survey Statistics Canada report) Page	RUNCTL_HPH905CN	Run a verification report (HPH905CN) so that you can compare your results with Statistics Canada's summary

FT Survey Stats CAN Rpt Page

Use the FT Survey Stats CAN Rpt page (RUNCTL_HPH905CN) to run a verification report (HPH905CN) so that you can compare your results with Statistics Canada's summary.

Navigation:

Workforce Development > **Faculty Events** > **Load Teaching Data CAN** > **FT Survey Stats CAN Rpt** > **FT Survey Stats CAN Rpt**

This example illustrates the fields and controls on the FT Survey Stats CAN Rpt page.

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Chapter 7

(AUS) Reporting DETYA for the Australian Higher Education Sector

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

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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 *contract* 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 *contract* 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 topic discusses how to maintain classification codes and 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	***Definition Name***	***Usage***
Classification Codes AUS Page	DETYA_CLSN_AUS	Define classification codes specific to DETYA reporting.
Organization Unit AUS Page	DETYA_ORGUNIT_AUS	Define organizational units specific to DETYA reporting.

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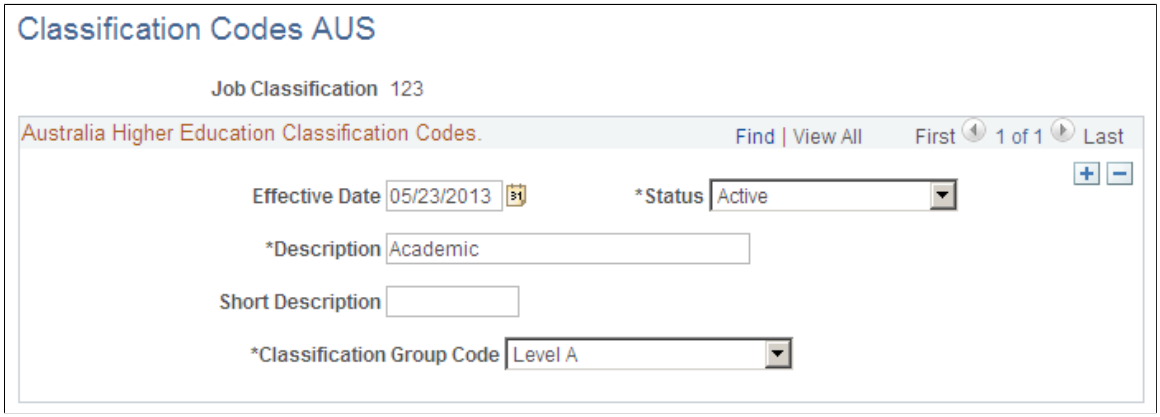
Classification Codes AUS Page

Use the Classification Codes AUS page (DETYA_CLSN_AUS) to define classification codes specific to DETYA reporting.

Navigation:

- **Workforce Development** > **Faculty Events** > **Define Faculty Events Data** > **Classification Codes AUS** > **Classification Codes AUS**
- **Set Up HCM** > **Product Related** > **Workforce Development** > **Faculty Events** > **Classification Codes AUS** > **Classification Codes AUS**

This example illustrates the fields and controls on the Classification Codes AUS page.



Field or Control	*Description*
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).

Organization Unit AUS Page

Use the Organization Unit AUS page (DETYA_ORGUNIT_AUS) to define organizational units specific to DETYA reporting.

Navigation:

- **Workforce Development** > **Faculty Events** > **Define Faculty Events Data** > **Organization Unit AUS** > **Organization Unit AUS**
- **Set Up HCM** > **Product Related** > **Workforce Development** > **Faculty Events** > **Organization Unit AUS** > **Organization Unit AUS**

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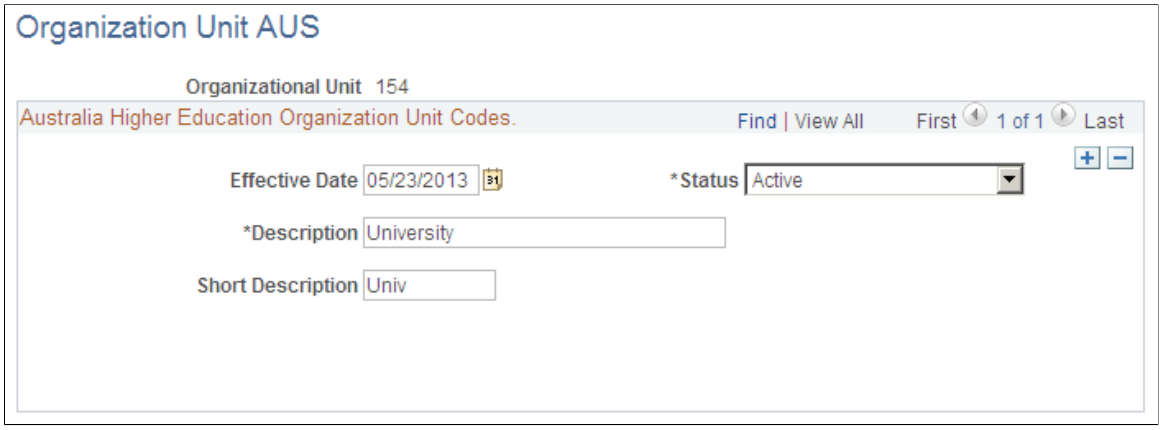
This example illustrates the fields and controls on the Organization Unit AUS page.



Field or Control	*Description*
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	*Definition Name*	*Usage*
Create DETYA Page	DETYA_PROCESS	Generate the permanent and casual DETYA data. This process saves the data to a temporary table. You can view or modify the details on the Review DETYA page. Select the end date for the report.
Create DETYA File Page	DETYA_FILE	Generate the electronic file for the Permanent or Casual report after running the data generation process. Confirm that the correct report is running. After running the report, review the error log. Use the Review DETYA page to make any changes.

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Page Name	***Definition Name***	***Usage***
Review DETYA Page	DETYA_PRCS_INQ	Update DETYA reporting information by individual employees, by employee ID, employee record number, or name. Changes made to this page are picked up by the Create DETYA File process but not updated at the employee level (for example, job, personal data, or education). If you make any changes to this page, you need to rerun the Create DETYA File process.

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