**SR APDB Faculty Transaction Report
Setup Guide**

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REVISION CONTROL

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This document is published as a baseline guide. Page shots may reflect campus specific information, provided as examples only. Any questions concerning this document should be addressed to the CMS SA team.

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Section 1   APDB Faculty Transaction Report Summary:

The following is a guide to the APDB Faculty Transaction Report. This guide will focus on each data element and where it will be captured in PeopleSoft 8.0.

Section 2   APDB Data Elements

2.1   Record Type

Captured in Run Control for Report.

Values: F

F = Faculty

2.2   Appointment Sequence

A one digit code used to identify a given faculty transaction as either a first, second or third departmental appointment (aka "assignment"). Each faculty person can have from one to three such appointments in a given term.

Collection Method: The "primary" department will be associated with Appointment Sequence #1, any additional assignments will require the designation of a second or third department. This will need to be captured in the class schedule and/or the Term Workload panel by selecting the 2nd or 3rd department based on the Appointment sequence and Assignment Type. Each Appointment sequence will create a separate faculty record.

Values: 1, 2, or 3

2.3   Year

The last two digits of the calendar year for which a report or job related process is being generated or performed. In most APDB jobs, the year/term/campus code requested by the user must correspond to an existing section and/or faculty master file, and must match the year/term/campus code contained in the header record of that file.

Collection Method: Run Control

Values: 00 – 99

2.4   Term Code

A code which indicates the period for which a report or job-related process is being generated or performed. Valid values are also maintained on COSAR table 011. In most APDB jobs, the year/term/campus code requested by the user must correspond to an existing section and/or faculty master file, and must match the year/term/campus code contained in the header record of that file.

Collection Method: Run Control.

Values: 1,2,3,4 where each value corresponds to 1=Winter; 2=Spring Semester or Quarter; 3=Summer Quarter; and 4=Fall Semester or Quarter

2.5   Campus Code

A code is assigned to each entity of the California State University. Valid values are also maintained on COSAR table 001. In most APDB jobs, the year/term/campus code requested by the user must correspond to an existing section and/or faculty master file, and must match the year/term/campus code contained in the header record of that file.

Collection Method: Run Control parameter and passed to the file. Can be defaulted to the institution submitting the file, but that institution's value should be mapped to COSAR 001 if prompted from the INSTITUTION_TBL. (i.e.,FRSNO=25, CMA=27, and SON=85).

Values: Various 2-digit codes maintained in COSAR Table 001.

2.6   SSN

The unique number identification assigned by the Social Security Administration. If the individual has no assigned number, the campus should designate a facsimile Social Security Number using the following scheme: Code YYCC0NNNN where N = Year; CC = Campus Code; 0 = Numeric Zero; NNNN = Sequential number starting with 0001.

Collection Method: Use EMPLID to get SSN from PERS_NID. NATIONAL_ID_TYPE='PR'.

Values: 000000001-999999999

2.7   Initial 1

These 3 fields constitute the Faculty Name data element, which consists of 20 alphanumeric characters in the format FMLLLLLLLLLLLLLLLLLLLL. The first character (first initial) within Faculty Name cannot be blank.

Collection Method: Derived from Bio/Demo data for the faculty member. The field used is FIRST_NAME.

Values: Any character corresponding to the first character of a person's first name.

2.8   Initial 2

These 3 fields constitute the Faculty Name data element, which consists of 20 alphanumeric characters in the format FMLLLLLLLLLLLLLLLLLLLL. The first character (first initial) within Faculty Name cannot be blank.

Collection Method: Derived from Bio/Demo data for the faculty member. The field used is MIDDLE_NAME

Values: Any character corresponding to the first character of a person's middle name.

2.9   Last Name

These 3 fields constitute the Faculty Name data element, which consists of 20 alphanumeric characters in the format FMLLLLLLLLLLLLLLLLLLLL. The first character (first initial) within Faculty Name cannot be blank.

Collection Method: Derived from Bio/Demo data for the faculty member. The field used is LAST_NAME

Values: The character set corresponding to a person's last name.

2.10   School Code

A standard code for all CSU campuses that uniquely identifies an academic division or school of study at the campus, each of which comprises one or more departments. School code must be a 2-digit non-zero number within the first assignment, i.e., "F1" transaction.

Collection Method: Derived from the INSTR_ADVISOR.ACAD_ORG entry in the Department Code field where the latter is/are the Department(s) with which the instructor is affiliated. If there is a 2nd and/or 3rd Appointment Sequence, the 2nd and 3rd Department ID will determine the school code for that selection.

Values: Various 2-digit codes maintained in COSAR Table 008.

2.11   Department Code

A standard code used throughout the CSU which uniquely identifies an academic department. The primary department will be captured on the Instructor/Advisor page for an instructor. If there is a 2nd and/or 3rd Appointment sequence, there must be a different department selected.

Collection Method: The primary department will be captured in the Instructor/Advisor table. The report will match any assignments for the instructor on the Term Workload Page with the Primary department on the Instructor/Advisor page for reporting purposes. The Department must be manually changed on the Term Workload Page to add a second or third departmental assignment for the faculty member.

Page Name: Instructor/Advisor Table

Navigation: Manage Student Records → Establish Courses → Setup → Instructor/Advisor Table

Page Name: Instructor/Advisor Table

**Navigation: Manage Student Records → Establish Courses → Use → Schedule of Classes →
Meetings**

**The APDB Department ID will automatically populate for the instructor on the Class Schedule
Meetings Page to match the Academic Organization for the Class Section. This APDB Department
ID will automatically transfer over to the Term Workload Page for each assignment for the
instructor.**

Page Name: Term Workload

Navigation: Manage Student Records → Establish Courses → Use → Term Workload

All of the term IFF assignments for each instructor are automatically transferred to the Term Workload Page from the Class Schedule. All APDB reporting will be extracted from the Term Workload Page for IFF, IAF, Assigned Time and OSF.

Values: Various 3-digit codes maintained in COSAR Table 009.

2.12   Range Code

A code indicating the position classification (salary range) of a faculty member for a given departmental assignment.

Collection Method: Derived from Grade on Empl Rec#.

Values: 0 – 8

2.13   Instructional Faculty Fraction (IFF)

An element that specifies the portion of a faculty appointment supported by instructional funds (see Full Time Equivalent Faculty). The value of this field is not affected by tenure status, i.e., temporary non-tenured faculty member would have an instructional faculty fraction of 1.000 when teaching a full load of classes. Decimal implied. Invalid value is defaulted to 0000.

Collection Method: "IFF" is loaded as an Assignment Type code. Regular instruction (IFF) is captured here and needs to be identified with an IFF assignment type. IFF will be the sum of Assignment FTE % for the rows that are designated as "IFF" on the Term Workload Page. IFF assignments will be entered on the Meetings Page of the Class Schedule Component. All IFF assignments will be transferred to one term based page (Term Workload) and the report will sum the rows for the term from that page. A full load (100%/1.000) will be reported as 1000. An IFF Assignment FTE% of 50% will be reported as 0500.

Page Name: Assignment Type

Navigation: Design Student Administration → Design Academic Structure → Setup → Assignment Type

Page Name: Meetings

Navigation: Manage Student Records → Establish Courses → Use → Schedule of Classes →
Meetings

Page Name: Term Workload

Navigation: Manage Student Records → Establish Courses → Use → Term Workload

All of the faculty member's assignments for each term will be displayed on the Term Workload Page. These assignments could include IFF, IAF, Assigned Time or OSF.

Values: 0000 to 1000

2.14   Instructional Administrative Fraction (IAF)

A data element which indicates the share of a faculty appointment that is supported by instructional administrative funds. Expressed as a decimal fraction of a full-time faculty position (1.000). Decimal implied. Invalid value is defaulted to 0000.

Collection Method: An Assignment Type of "IAF" will enable the institution to identify IAF and manually associate it with an Administrative Level on the Term Workload panel. The Administrative Level will be a reason code attached to each IAF selection. IAF will be reported as the sum of Assignment FTE % for the rows that are designated as "IAF". (100% will be reported as 1000, 50% will be reported as 0500).

Page Name: Assignment Type

Navigation: Design Student Administration → Design Academic Structure → Setup → Assignment Type

Page Name: Term Workload

Navigation: Manage Student Records → Establish Courses → Use → Term Workload

Values: 0000 to 1000

2.15   Administrative Level

A code that denotes the organizational level at which a person with an Instructional Administrative Fraction (IAF) is assigned. It also defines the type of work assigned and the term of appointment. Persons with an IAF of 0.0 will be coded zero (0). Within a given assignment, a non-zero Instructional Administrative Fraction must be accompanied by a non-zero Administrative Level and vice versa.

Collection Method: Administrative Level is directly linked to Instructional Admin Fraction - IAF is setup as an assignment type, the non-teaching reason code that is associated with that the assignment type reflects the Administrative Level. The Administrative Level will be a Reason code and will be captured on the Term Workload panel at the time of assignment to any IAF.

Page Name: CSU Workload Reason Table

Navigation: CSU SA Baseline → CSU CO Reporting → APDB Setup→ CSU Workload Reason Table

These 7 Administrative Level values are associated with the IAF Assignment Type.

Page Name: Term Workload

Navigation: Manage Student Records → Establish Courses → Use → Term Workload

When IAF is selected on the Term Workload Page, the Administrative Level will be selected for that assignment by clicking on the Assign Type Reason code link. By selecting IAF as the Assignment type, the only valid values associated with this IAF assignment are the Administrative Level codes listed below.

Select the appropriate Administrative Level for the IAF assignment here.

Page Name: Assign Type Reason

Navigation: Manage Student Records → Establish Courses → Use → Term Workload → Assign Type Reason

Values: 0 – 7

2.16   Assigned Time Codes 1, 2 and 3

A numeric code used to indicate up to three different types of activities per faculty assignment for which a faculty member can receive workload credit. Within a department assignment, if the Assign Time Code is zero, its corresponding WTU must also be zero. If Assign Time Code is greater than zero, its corresponding WTU must also be greater than zero.

Collection Method: This value will come from PS setup table Assignment_Type, a checkbox has been added to indicate whether this entry is an Assigned Time Code. Each assigned time code assignment will be manually entered on the Term Workload Page.

All Assigned Time Codes are loaded in the Assignment Type Table.

Page Name: Assign Type

Navigation: Design Student Administration → Design Academic Structure → Setup → Assignment Type

For reporting purposes, the Assigned Time Code Value checkbox will be checked to identify each Assigned Time Code Value setup in the Assignment type Table.

Page Name: Term Workload

Navigation: Manage Student Records → Establish Courses → Use → Term Workload

Any Assigned time assignment for an instructor will be manually entered on the Term Workload Page for each term.

Values: Various 2-digit codes maintained in COSAR Table 010.

2.17   Assigned Time WTU 1, 2 and 3

Decimal implied. Weighted teaching units. The number of Weighted Teaching Units (WTU) assigned to the faculty member in conjunction with the associated 'Assigned Time Code'. Within a department assignment, if the Assign Time Code is zero, its corresponding WTU must be zero. If the Assign Time Code is greater than zero, its corresponding WTU must also be greater than zero.

Collection Method: For each Assigned Time assignment, the workload field on the Term Workload Page will be used to capture the WTU for the assignment.

Page Name: Term Workload

Navigation: Manage Student Records → Establish Courses → Use → Term Workload

For each Assigned Time Code, the WTU will be manually entered on the Term Workload Page.

Values: 000 – 120 (Decimal implied 99v9)

2.18   Other Support Fraction (OSF)

A data element which indicates the share of a faculty appointment that is supported by state budget funding other than instructional faculty or instructional administration, expressed as a decimal fraction of a full-time faculty position (1.000). Decimal implied.

Collection Method: An Assignment Type of "OSF" will enable the institution to identify OSF and manually associate it with a faculty assignment on the Term Workload panel. OSF will be the sum of Assignment FTE % for the rows that are designated as "OSF".   (100% will be reported as 1000, 50% will be reported as 0500).

Page Name: Assign Type

Navigation: Design Student Administration → Design Academic Structure → Setup → Assignment Type

Page Name: Term Workload

Navigation: Manage Student Records → Establish Courses → Use → Term Workload

Each OSF assignment will be entered manually on the Term Workload Page for each term.

Values: 0000 – 1000 (Decimal implied 9v999)

Section 3   APDB Process Run Controls

3.1   APDB Faculty Data Extraction

Use the APDB Faculty Data Extraction Page to identify which Institution School Code and Term that are to be run for the Data Extraction. This process will populate the CSU_APDB_FACLTY record for the Term specified in the Run Control.

Page Name: APDB Faculty Rpt

Navigation: CSU SA Baseline → CSU CO Reporting → APDB Proc → APDB Faculty Data Extraction

To determine which Faculty assignments to exclude from the report, select the method to identify Self Supported and/or Extended Education courses. The choices are Academic Group or Session. Once you identify the method, select the specific values to use for exclusion.

3.2   APDB Faculty Report Edit

Use the APDB Faculty Report Edit to determine potential errors in your report before submitting to the Chancellor's Office for official review. ***Important Note: In order to generate the correct Edit report, you must use the same Run Control Id and OPERID that you used to generate the APDB Faculty Report above.***
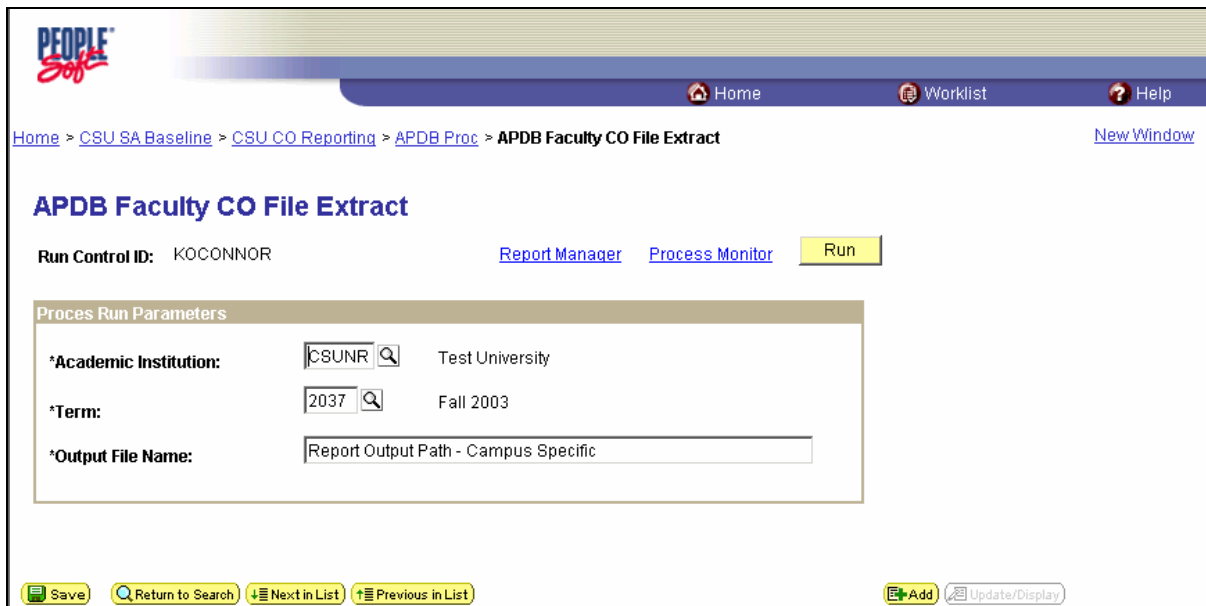
Navigation: CSU SA Baseline → CSU CO Reporting → APDB Proc → APDB Faculty Data Edit
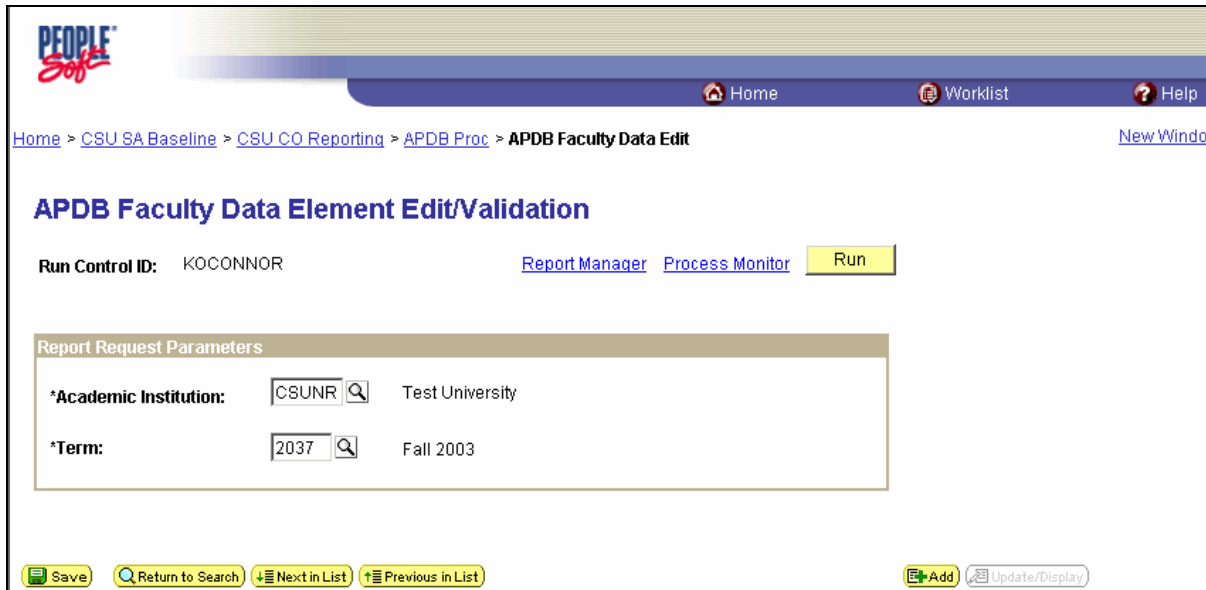
3.3 APDB Faculty CO File Extract

Use the APDB Faculty CO File Extract to generate the flat file that will be submitted to the Chancellor's Office.

Navigation: CSU SA Baseline → CSU CO Reporting → APDB Proc → APDB Faculty CO File Extract

3.4   APDB Prior Term Copy – Class Section Data

CMS has provided an Application Engine process to roll all of the ADPB values forward to the next term(s). *Important Note: This process must be run after the PeopleSoft delivered Term Copy process is run*.

Page Name: APDB Faculty Prior Term Copy

Navigation: CSU SA Baseline → CSU CO Reporting → APDB Proc → APDB Faculty Prior Term Copy