Oracle

Global Human Resources Cloud Using Absence Management

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This guide also applies to on-premises implementations

Oracle® Global Human Resources Cloud Using Absence Management

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Preface

This preface introduces information sources that can help you use the application.

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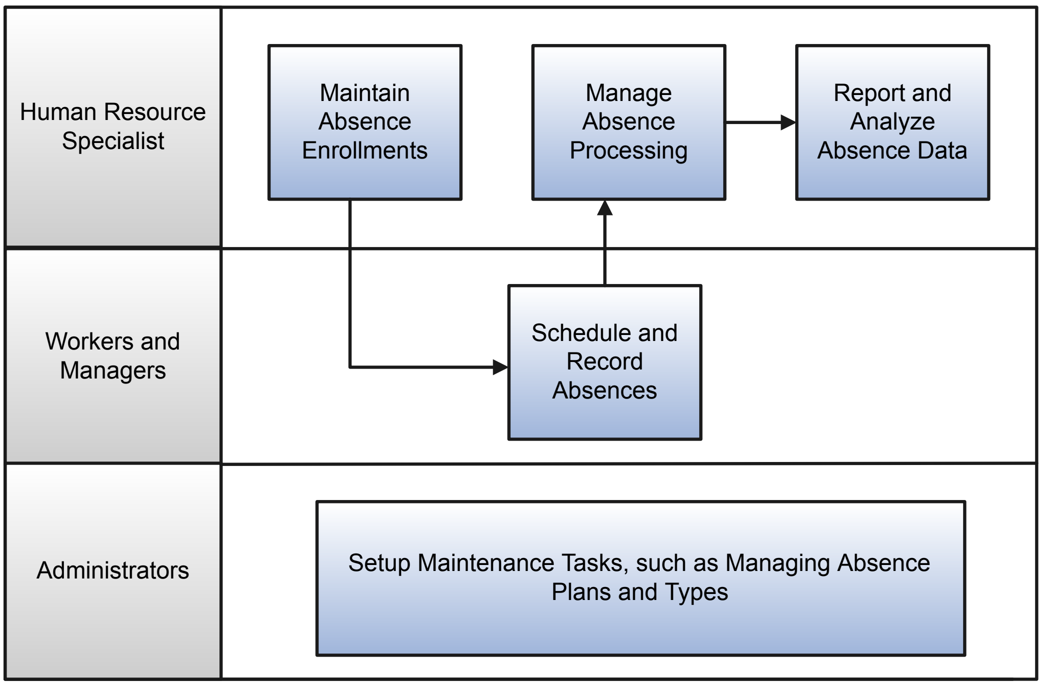
1 Absence Management Usage Overview

Using Absence Management: Overview

Provide accurate absence records for reporting and payroll calculations using the Manage Absences business process.

The following figure depicts the business activities for different roles within this business process.



Maintain Absence Enrollments

HR specialists use the Manage Absence Records and Entitlements page to:

- Record absences
- Review entitlements and balances for the absence period
- Review plans that the worker is currently enrolled in
- Calculate accruals
- Adjust plan balances
- Enroll workers in new plans

Schedule and Record Absences

Workers, or their managers:

- Record absences
- Review the daily breakdown for the absence period
- Create absence cases to group related absences, such as absences due to long-term illness

Manage Absence Processing

HR specialists run the following processes using the Schedule and Monitor Absence Processes task in the Absence Administration work area:

Process Name	Description
Evaluate Absences	Calculates entitlements for unprocessed absences based on absence plan rules
Update Accrual Plan Enrollments	Updates enrollments based on the new hire and transfer events for multiple workers
Calculate Accruals and Balances	Calculates the accrual balances for multiple workers under an accrual absence plan
Evaluate Certification Updates	Checks whether certification requirements for multiple workers are past their due dates

Report and Analyze Absence Data

HR specialists:

- Review lists of workers for various parameters such as absence category or type
- Review workers' absence history to investigate issues
- Analyze absence cases to make informed decisions while reviewing existing policies

Managers can review absence analytics that enable them to compare absence trends in their organizations over a period of time.

Maintain Absence Setup

Administrators can:

- Perform periodic maintenance of the absence plans, types, and reasons
- Create and update rate definitions, derived factors, eligibility profiles, repeating time periods to associate with absences

Absence Management Work Areas

To manage absences, start from the following work areas:

Role	Navigation to Work Area
HR specialist	Select **Navigator** - **My Workforce** - **Person Management**
Manager	Select **Navigator** - **My Team** - **Manager Resources Dashboard**
Worker	Select **Navigator** - **About Me** - **My Portrait**
Administrator	Select **Navigator** - **My Workforce** - **Absence Administration**

Related Topics

- Absence Recording Statuses: Explained

2 Schedule and Record Absences

Absence Recording Statuses: Explained

This topic explains absence record statuses that change based on time and events.

Absence Statuses

An absence record displays any of the following statuses:

Status	Description
Saved	The absence request is saved but yet to be submitted.
Awaiting Approval	The submitted absence is waiting to be approved. On approval, the status changes to **Scheduled** or **Completed**.
Withdrawn	The submitted absence is canceled.
Approval Denied	The submitted absence was not approved. A rejected absence record does not display any longer in the Absence Records section.
Scheduled	An approved absence request for a period in the future.
In progress	The absence period of the approved absence has started.
Completed	An approved absence for a period in the past.

FAQs

How can I enroll and disenroll workers in accrual plans?

Use the Update Accrual Plan Enrollments process to update enrollments for multiple workers based on the new hire and transfer events. You can schedule this process on the Schedule and Monitor Absence Processes page in the Absence Administration work area. You can also use this process to update enrollments of multiple workers for a specific accrual plan.

To update enrollments for a specific worker, search for the worker on the Person Management page. Then, use the enrollment actions on the Maintain Absence Records and Entitlements task.

Why can't I see my absence type on the absence categories page?

Ensure that the absence type is active and effective on the current date.

Can I cancel or update an absence partially?

Yes. Use the **Advanced** button on the Add Absence page to manage an absence period that contains noncontinuous dates.

Where does the absence duration value come from?

The primary work schedule of a worker, by default. However, if the absence plan rules were set up to calculate the duration differently, then that calculation takes precedence over the work schedule.

What happens if I delete a past absence?

Payment information and band entitlements for that absence period are revised automatically based on the rules of the corresponding absence plan.

What happens if I create an open-ended absence?

Until you enter the actual end date, the absence duration and accrual balance are not updated. For a qualification absence, such as long term sickness, the estimated end date is not used in the entitlement calculation. It is for information purpose only. Instead, the entitlement is calculated for a whole year (365 days). When an end date is entered on the absence, the entitlement is recalculated based on the actual end date.

How can I check whether certification requirements for multiple persons are past their due dates?

Run the Evaluate Certification Updates process using the Schedule and Monitor Absence Processes task in the Absence Administration work area.

How can I calculate accrual balances of workers?

Use the Calculate Accruals and Balances process to calculate the accrual balances for multiple workers associated with a specific accrual plan. You can schedule this process on the Schedule and Monitor Absence Processes page in the Absence Administration work area.

To calculate accrual balances for a specific worker, search for the worker on the Person Management page. Then, use the accrual actions on the Maintain Absence Records and Entitlements task. You can calculate accruals for a specific plan or all plans in which the worker is currently enrolled.

Can I upload accrual balances for multiple workers at once?

Yes, you can upload accrual balances using the Human Capital Management File-Based Loader option. For more information, see the HCM File-Based Loader chapters in the Integrating with Oracle HCM Cloud Guide.

Why can't I see an attachment option when scheduling an absence?

You need to first enable the Attachment option in the Display Features tab using the Manage Absence Types task in the Absence Administration work area.

Why can't I upload a file when recording an absence?

Ensure that the file size does not exceed the maximum limit of 2 MB.

Can I schedule an absence on a public holiday?

Yes. However, the absence will not reflect in the work schedule since it is a non working day.

3 Effective Dates in Absence Management

Date Effectivity: Explained

Date effectivity preserves a history of changes made to the attributes of some objects. Professional users can retrieve and edit past and future versions of an object.

Many Human Capital Management (HCM) objects, including person names, assignments, benefits plans, grades, jobs, locations, payrolls, and positions are date-effective.

Logical and Physical Records

Date-effective objects include one or more physical records. Each record has effective start and end dates. One record is current and available to transactions. Others are past or take effect in the future. Together, these records constitute the logical record or object instance.

This table shows changes to the department manager attribute in a department business object. Each row represents a single physical record.

Physical Record	Effective Start Date	Effective End Date	Department Manager
4	18 January, 2011		C. Woods
3	15 October, 2010	17 January, 2011	A. Chan
2	13 June, 2009	14 October, 2010	T. Romero
1	22 March, 2007	12 June, 2009	G. Martin

Note: The physical record number doesn't appear in the record.

Effective End Dates in Physical Records

Every physical record except the last has an effective end date. The update process adds this date, which is the day before the effective start date of the next record, whenever you update the object.

Object End Dates

You can enter a final effective end date for some date-effective objects. For example, terminating an assignment adds a final effective end date to the assignment. Alternatively, the **End Date** action may be available. If you end date a date-effective object, then it isn't available to transactions after that date. However, the object's history is retrievable.

Status Values in Date-Effective Objects

Some date-effective objects, such as grades and jobs, have both effective dates and status values. When the object status is **Inactive**, the object isn't available to transactions, regardless of its effective dates. Setting the status to **Inactive** makes objects unavailable to transactions. If you can't enter an effective end date for an object, then changing its status has the same effect.

Future-Dated Changes

For date-effective objects, you can enter future changes. For example, you enter the following worker promotion on 25 October, 2011 to take effect on 18 January, 2012.

Physical Record	Effective Start Date	Effective End Date	Grade
2	18 January, 2012		IC2
1	14 October, 2010	17 January, 2012	IC1

Physical record 2 becomes current on 18 January, 2012. From 14 October, 2010 until 17 January, 2012 physical record 1 is current and available to transactions. Users who can access the object history can see physical record 2 before it takes effect.

When future-dated changes exist, other actions may be limited. For example, to end this worker's assignment before the promotion takes effect, you must first delete the promotion.

Date-Enabled Objects

Some objects, such as work relationships, are date-enabled rather than date-effective. They have start and end dates that define when they're available, but they have no history of changes. New attribute values overwrite existing attribute values.

Related Topics

- Making Multiple Updates to Date-Effective Objects in One Day: Explained
- Deleting Physical Records from Date-Effective Objects: Explained

Correcting Date-Effective Objects: Examples

You can correct most attributes of date-effective objects, regardless of whether they occur in current, past, or future physical records.

If you correct the effective start date of an object's first physical record, then the revised date must be before the current effective start date. For the second and subsequent records, the revised date must be between the record's current effective start and end dates.

Correcting a Current Error

On 11 March, 2011 you create a location definition but enter the wrong phone. On 21 March, 2011, you search for the definition and select the **Correct** action. Before correction, the object history is as follows.

Physical Record	Effective Start Date	Effective End Date	Location Phone
1	11 March, 2011		650.555.0175

After correction, the object history is as follows.

Physical Record	Effective Start Date	Effective End Date	Location Phone
1	11 March, 2011		650.555.0176

Because you corrected the object, no change history exists.

Correcting a Past Error

A worker's assignment history is as follows.

Physical Record	Effective Start Date	Effective End Date	Job	Working at Home
4	20 October, 2010		Line Manager	No
3	18 August, 2010	19 October, 2010	Senior Administrator	No
2	10 May, 2010	17 August, 2010	Senior Administrator	Yes
1	25 July, 2009	9 May, 2010	Administrator	Yes

You learn that the worker's job was actually Project Leader from 10 May to 19 October, 2010. As this period spans physical records 2 and 3, you must correct both.

To retrieve physical record 2, you set the effective as-of date in the person search to any date between 10 May and 17 August, 2010. You select the assignment from the search results and make the correction.

You then retrieve physical record 3 and make the same correction.

Updating Date-Effective Objects: Examples

When you update a date-effective object, you insert a physical record in the object's history. Typically, the inserted record follows the current record and the effective start date is today. However, you can also enter future-dated changes and update past records.

Entering Future-Dated Changes

The grade EC3 exists from 17 June, 2009. Its ceiling step changes from 1 January, 2012. On 30 November, 2011, you change the grade's ceiling step and enter an effective start date of 1 January, 2012. This change creates a physical record in the grade definition, as shown in this table.

Physical Record	Effective Start Date	Effective End Date	Ceiling Step
2	1 January, 2012		4
1	17 June, 2009	31 December, 2011	3

From 1 January, 2012 physical record 2 is in effect. Until then, physical record 1 is in effect.

Applying Historical Updates to Later Records

Jennifer Watts has one assignment, as follows:

Physical Record	Effective Start Date	Effective End Date	Grade	Location
2	18 September, 2010		A1	Area Office
1	10 April, 2010	17 September, 2010	A1	HQ

You promote Jennifer to grade A2 from 1 July, 2010. You update her assignment with an effective start date of 1 July, 2010 and enter grade A2. This update:

- Inserts a physical record between existing records 1 and 2
- Sets the effective end dates of physical record 1 to 30 June, 2010 and of the inserted record to 17 September, 2010

You also correct existing physical record 2 to change the grade from A1 to A2.

Jennifer's assignment history is now as follows:

Physical Record	Effective Start Date	Effective End Date	Grade	Location
3	18 September, 2010		A2	Area Office

Physical Record	Effective Start Date	Effective End Date	Grade	Location
2	1 July, 2010	17 September, 2010	A2	HQ
1	10 April, 2010	30 June, 2010	A1	HQ

FAQs

What's the effective as-of date?

A date value that filters search results. For any date-effective object that matches the other search criteria, the search results include the physical record for the specified effective as-of date. The effective as-of date is one of the search criteria. Therefore, objects with effective dates that don't include the specified date don't appear in the search results. By default, the effective as-of date is today's date.

What's the difference between updating and correcting a date-effective object?

When you update an object, you insert a physical record in the object's history. Typically, the inserted record follows the current physical record, and the effective start date is today's date. However, you can edit the object history or create a future-dated change by setting an appropriate effective start date.

When you correct a date-effective object, you edit the information in an existing physical record. You don't create a physical record.

What happens when I end date an object?

The date that you enter becomes the final effective end date for the object. If physical records exist for the object beyond the effective end date, either they're deleted automatically or you delete them.

The object's history remains available. For example, the object may appear in search results if the search criteria include an effective as-of date that's within the object's effective dates.

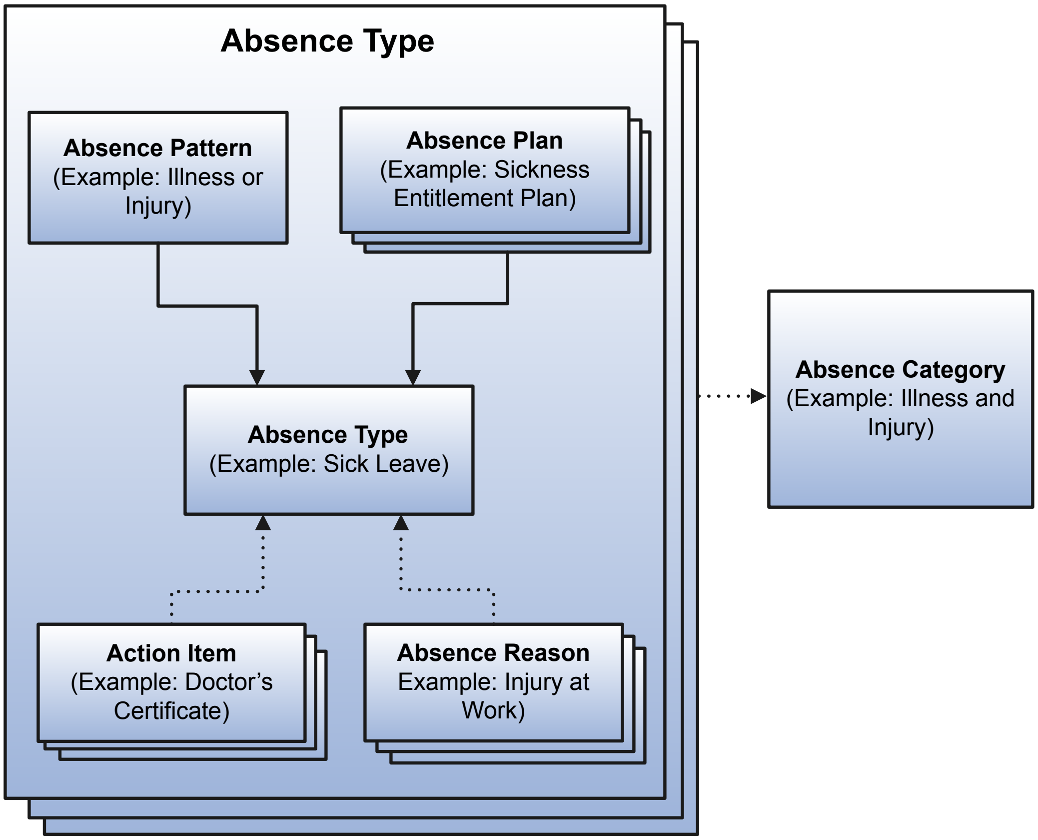
4 Absence Types, Reasons, and Categories

Absence Management Components: How They Work Together

Configure absence components such as types, categories, patterns, plans, reasons, and certifications to reflect the absence management policy of your enterprise.

Component	Location in the Absence Administration Work Area
Absence types	Use the Manage Absence Types task to create absence types.
Absence categories	Use the Manage Absence Categories task to create absence categories and associate them with absence types.
Absence patterns	Review these settings on the Display Features tab when you create an absence type.
Absence plans	Use the Manage Absence Plans task to create absence plans.
Absence reasons	Use the Manage Absence Reasons task to create absence reasons.
Action items	Use the Manage Certifications task to set up a requirement. Then associate the requirement as an action item with an absence type so that every absence associated with the absence type is subject to that requirement.

This figure illustrates how the absence management components fit together.



Absence Type

When you create an absence type, such as sick leave, you include rules to determine when users record or manage an absence of that type. For example, you can restrict workers so that they can record absences only of a particular duration. An alert appears if the entered duration exceeds the maximum value.

Decide which fields or sections you want to show or hide for specific user roles when they record or approve a specific absence type.

Absence Category

Create absence categories to group absence types for reporting and analysis. For example, you can create an absence category called family leave and associate with it absence types, such as maternity, paternity, and child care.

Absence Pattern

An absence pattern contains a predefined set of rules that you can use as a starting point to create an absence type. When you create an absence type, you must associate it with any of the following predefined patterns:

- Illness or injury

- Childbirth or placement
- Generic absence

For example, you can select the Generic absence pattern to create an absence type to schedule vacation time using the time accrued under a vacation accrual plan.

The pattern that you select determines:

- Whether special fields appear on the absence type pages
- The options available to display and process various aspects of absence recording

For example, the Illness or injury pattern displays a field for selecting whether the absence type applies for childbirth or adoption placement.

Absence Plans

Create absence plans to define rules for accruing leave time and receiving payments during an absence period. You must associate at least one absence plan with an absence type.

To schedule an absence using an absence plan, the unit of measure defined in the plan must match the unit of measure defined in the associated absence type. If the unit of measure differs, you can define the conversion formula and attach it to the absence type. This formula is applicable only if the unit of measure is hours or days for the absence type.

Absence Reasons

Create absence reasons to select from when scheduling an absence. Absence reasons are independent of absence types. You can use the same reason for multiple absence types. When you create an absence type, you associate the reasons with the type.

Action Items

Create certification requirements for absences that require documentation to authorize an absence. For example, in case of an absence due to illness, set up a requirement that workers must submit a doctor's certificate within a stipulated period of time. This ensures they receive full payment for the absence duration.

Related Topics

- Creating a Maternity Absence Qualification Plan: Worked Example
- Creating a Vacation Absence Accrual Plan: Worked Example
- Creating an Absence Certification Requirement: Worked Example

Absence Display and Processing Rules: Explained

When you create an absence type, you can configure:

- The display of various fields and sections on the absence recording pages for specific user roles
- Rules related to entry of information into specific fields. Based on the absence pattern that you select, all fields and rules have default values, which you can configure on the Display Features tab.

You can configure the usage of the following sections:

Primary Details Configuration

Determine whether you want to show or hide the following fields in the Supplemental Details section on the absence recording pages:

- Reasons
- Comments
- Attachments

Qualified Entitlement Rule

Configure this rule to show or hide the Qualified Entitlements section on the absence recording pages for qualification plans. When workers schedule an absence related to a qualification absence plan, the Qualified Entitlements section displays payment percentages that apply during the absence period.

Approval and Processing Rules

Configure rules related to absence approvals and processing that are available to specific roles in the approval page.

Insufficient Balance Enforcement Rule

Configure this rule to show or hide the Projected Balances section on the absence recording pages. When workers schedule an absence related to an accrual absence plan, an error message prevents workers from adding an absence if there is insufficient accrual balance.

Dates and Duration Configuration

Control the processing and display of the date-related fields that appear on the absence recording pages. This section covers the dates that are captured, calculated, and evaluated. The fields vary significantly by absence pattern.

Supplemental Details Configuration

Control the display of additional fields that collect additional information and support absence processing. The fields vary based on the pattern selected.

Absence Approval and Processing Rules: Explained

When you create an absence type, you can configure the absence approval and processing rules.

The following table explains the absence approvals and processing rules:

Rule	Effect of Enabling
Approval processing	All absence submissions must be approved.

Rule	Effect of Enabling
Approvals reset on update	Enabled: Approvers can escalate approval of an absence request to a higher level in the approval hierarchy. Disabled: Only approvers in the first level of the approval hierarchy can approve the absence.
Deferred processing	An absence that you schedule does not have any impact on accrual balance or entitlements until you confirm the absence. You must run the Evaluate Absences process to confirm deferred absences.
Additional payload attribute	Helps you configure the absence approval flow according to your organization needs. This allows more flexibility in routing approvals within your organization.
Concurrency	Enable workers to receive concurrent entitlements through different absence types for absences scheduled for the same time and day.

Absence Dates and Duration Rules: Explained

When you create an absence type, you can configure the processing and display of the following date-related fields that appear on the absence recording pages:

- Absence start date
- Planned absence end date
- Absence end date
- Occurrence limit rule: Configure this rule to set a limit on the duration and occurrence of an absence type.
- Open ended: Configure this rule to enable workers to submit an absence without entering an absence end date.
- Absence start date validation: For accrual plans, configure this rule to determine dates when workers cannot schedule an absence. For qualification plans, configure this rule to determine a specific date, based on the absence start date, to process entitlements for the absence that the worker submitted.
- Late notification evaluation: For qualification plans, configure this rule to determine the date that qualifies an absence notification as one that was received late.
- Advanced absence entry: This rule enables the Advanced mode option so that workers can schedule discontinuous dates, a weekly recurring absence, or a half day absence.
- Override Daily Duration: This rule enables workers to override the start and end time of a particular day on which they were absent.

Enabling Override Daily Duration: Procedure

This rule is useful when workers are working variable hours and the employer does not want to change the work schedule. Configure an absence type that uses hours as the unit of measure to override the start and end time of a particular absent day. A work schedule determines the times when a worker is available and unavailable for work based on the defined daily working hours for a worker. So when a worker schedules an absence, the defined daily working hours appear automatically on the absence request page. This override daily duration rule enables workers to modify the defined daily duration to more than the availability hours when scheduling an absence.

To enable the override daily duration rule:

1. In the Absence Administration work area Tasks panel tab, click **Manage Absence Types**.
2. In the Search Results section, click **Create** to open the Create Absence Type dialog box.
3. Select the pattern.
4. Click **Continue** to open the Create Absence Type page.
5. In the Type Attributes tab, enter the name.
6. Select the legislative data group.
7. Select the **Display Features** tab.
8. In the Dates and Duration section Override daily duration row, select **Enabled.**
9. Click **Save and Close** to return to the Manage Absence Types page.

Workers use the advanced absence entry page to override the automatically calculated absence duration.

Absence Supplemental Details Configuration: Explained

When you create an absence type, you can control the display of the following fields that appear in the Supplemental Absence Details section on the absence recording pages:

- **Authorized absence**: Provides notification of an authorized absence.
- **Authorization status updated**: Determines the authorization status for an absence based on the certification update.
- **Block leave status**: Enables workers to report a fixed period away from work deducted from the worker's normal annual leave entitlement. For example, in financial organizations depending on the nature of work, certain workers are required to take a block of leave every year so that finance watchdog organizations can audit the financial transactions for any inconsistencies.
- **Late notification waiver date**: Determines the waiver date when an absence notification qualifies as a late notification.
- **Late notification waived**: Determines when an absence notification that qualifies as a late notification is waived.
- **Special conditions**: Enables workers to select any special conditions relevant for the absence type. This field appears when you select the Illness or injury or Childbirth pattern.
- **Matching date**: Displays the date a child is matched with the worker for adoption purposes. When the child is from another country, it is usually the date the child enters the prospective parent's country. This field is applicable only when you select Placement as the event type.

Absence Start Date Validation Rule: Examples

The examples in this topic show you how to use the absence start date validation rule to restrict accrual plan related absence entries to particular dates. You can also use this rule to determine the date when you want to process entitlement calculations for a qualification plan related absence.

You configure the absence start date validation rule in the Display Features tab when you create or edit an absence type.

Configuring the Rule for Accrual Plan Absences Using Two Conditions

Scenario:

- You want to enable workers to schedule an absence only if the absence start date is two days later than or equal to the current date.
- You also want another condition that prevents workers from scheduling an absence too far in advance. You want workers to schedule an absence only up to three months from the current date.

You configure the first condition of the absence start date validation rule with the following information.

Field	Value
Operation type	> (earlier than)
Reference date	System date
Operand	+
Time period	2
UOM	Calendar days

You configure the second condition of the absence start date validation rule with the following information.

Field	Value
Operation type	> (later than)
Reference date	System date
Operand	+
Time period	3
UOM	Months

Configuring the Rule for Qualification Plan Absences Using a Single Condition

Scenario: You have defined a qualification plan for workers to schedule maternity absences. Although you want to enable workers to submit the absence, you want to defer processing entitlements until thirty days after the absence entry date.

You configure the absence start date validation rule with the following information.

Field	Value
Operation type	= (equal to)
Reference date	System date
Operand	+
Time period	30
UOM	Days

Absence Late Notification Assessment Rule: Example

This example shows how you can configure the late notification assessment rule to determine when an absence notification qualifies as a late notification. You configure the late notification assessment rule in the Display Features tab when you create an absence type.

Configuring the Rule for Qualification Plan Absences

Scenario: You want to treat an absence notification as timely only if the worker submits it within two days after the absence date.

You configure the late notification assessment rule with the following information.

Field	Value
Operation type	<= (earlier than or equal to)
Reference date	Absence start date
Operand	+

Field	Value
Time period	2
UOM	Days

Associating Concurrent Absence Plans with an Absence Type: Example

You define concurrent absence plans to ensure that workers receive payments from multiple plans simultaneously during the absence period. Use the example in this topic to understand how to indicate plans that must offer concurrent entitlement.

Statutory Plans and Occupational Plans

In accordance with government-mandated rules of your country, you want to enable workers going on maternity leave to receive simultaneous payments from:

- A statutory qualification absence plan
- An occupational maternity absence plan

The occupational maternity plan contains rules defined by your enterprise that entitle workers to payment in addition to the statutory payment rules.

When you create the statutory plan and the occupational plan, you must: select the Enable concurrent entitlement check box in the Plan Attributes tab for both the plans.

1. Select the Enable concurrent entitlement check box in the Plan Attributes tab for both plans.
2. Associate these plans with the maternity absence type when you create that absence type.

Prioritizing Absence Plans for an Absence Type: Examples

You prioritize absence plans associated with the absence type to determine the order in which the plans must process accrual balances and entitlements. These examples show how to prioritize plans according to your requirement.

Prioritizing Multiple Accrual Plans

Scenario: You want to enable workers to use vacation time from two accrual absence plans. When workers exhaust time from one plan, they must be able to use time from the other plan.

When you associate each of these plans with the absence type:

- Set a higher priority to the absence plan whose accrual balance workers must use first.

- Set a lower priority to the absence plan whose balance workers must use after they exhaust the other plan's balance.

Prioritizing Multiple Qualification Plans

Scenario: In accordance with statutory rules, you want workers on long-term sickness absence to receive payments from two plans in this sequence:

- Payments from a statutory plan
- Payments from an occupational sickness plan

When you configure the plans:

- Set a higher priority to the statutory plan so that workers are paid from that plan first.
- Set a lower priority to the occupational sickness plan so that payment rules in that plan are processed after the statutory plan.

Configuring a Concurrent Absence Type: Example

This example shows how you can configure the concurrency rule so that a worker can record a concurrent absence for the same time period through multiple absence types. You configure the concurrency rule in the Display Features tab when you create an absence type.

Configuring the Concurrency Rule for an Absence Type

Scenario: A worker falls ill during a vacation period. You want to enable the worker to record a sickness absence for some dates overlapping with the vacation dates.

To ensure the worker is able to record a concurrent sickness absence, you must enable concurrency in the Display Features tab for one of the absence types. When concurrency is enabled, depending on the rules defined by the worker's enterprise, the worker can:

- Receive sickness entitlements
- Recover vacation days for those overlapping sickness days

Creating an Absence Type for Scheduling Vacation Time: Worked Example

This example shows how to create an absence type to conform to a specific leave policy of an enterprise.

This table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
What is the name of the absence type?	Vacation
The absence type must belong to which absence pattern?	Generic absence
What unit of measure must workers use to record an absence?	Days
What is the minimum absence duration that workers must schedule to submit the absence?	2 working days
Can workers schedule an absence whose duration is less than the minimum limit?	Yes, but display a warning message before allowing users to submit the absence.
What is the maximum absence duration that workers can schedule?	10 working days
Can workers schedule an absence whose duration exceeds the maximum limit?	No. Display an error message that prevents users from submitting the absence
Can workers schedule partial-day absences?	No
Who can update absence records after submitting them?	Managers and workers only
Can workers record absences of this type from a time card?	Yes
Can workers and managers use the advanced absence entry method to record discontinuous absence dates?	No. Only administrators can use the advanced absence entry method.

Create the vacation absence type on the Manage Absence Types page.

In this example, use this page to:

- Specify who can update absences of this type
- Set maximum and minimum duration limits
- Enable the advanced absence entry function during absence scheduling

Creating an Absence Type

1. In the Absence Administration work area Tasks panel drawer, click **Manage Absence Types**.
2. Click **Create**.
3. On the Create Absence Type dialog box, complete the fields, as shown in this table. Use default values for fields unless the steps specify other values.

Field	Value
Legislation	Select your legislation
Pattern	Generic absence

Field	Value

4. Click **OK**.
5. On the Create Absence Type page, Type Attributes tab, complete the fields, as shown in this table. Use default values for fields unless the steps specify other values.

Field	Value
Name	Vacation
Status	Active
UOM	Days
Legislative data group	Select your legislative data group
Minimum Duration Alert	Warning
Minimum Duration	2
Maximum Duration Alert	Error
Maximum Duration	10
Partial Day Rule	Not allowed
Enable worker updates	Select
Enable manager updates	Select

6. Click the Display Features tab.
7. In the Dates and Duration section, complete the following fields for the **Advanced Absence Entry** usage rule.

Field	Value
Employees	Not enabled
Managers	Not enabled
Administrators	Enabled

8. Click **Save and Close**.

FAQs

Why can't I see my absence type on the absence categories page?

Ensure that the absence type is active and effective on the current date.

Why can't I see my absence plans and absence reasons on the absence types page?

Ensure that the absence plan and absence reason are active and effective on the current date.

5 Accrual Absence Plans

Absence Plan Types: Critical Choices

Create accrual plans, qualification plans, and no entitlement plans using the Manage Absence Plans task in the Absence Administration work area.

Accrual

Use this type to create absence plans that enable workers to accrue time for taking paid leave, such as a vacation plan. Configure rules that determine various aspects of leave time, such as:

- Length and type of the accrual term in which workers accrue time
- Maximum time that workers can accrue in a term
- Maximum time that workers can carry forward to the next term

Qualification

Use this type to create an absence plan where workers qualify for the plan and receive payments during the absence period. For example, use qualification plans for defining absence rules related to events, such as long term illness or maternity. Configure rules to determine the payment percentages that apply for specific periods during the absence, for specific workers.

No Entitlement

Create absence plans of this type to track paid or unpaid absences without maintaining an accrual balance or providing leave entitlements, such as periodic accruals. Similar to an accrual plan, you can define the length and type of the plan term and determine when eligible workers can enroll in the plan. You can also use plans of this type in combination with a qualification plan. For example, use a no-entitlement plan to pay workers if they are not eligible for a standard maternity absence qualification plan.

Related Topics

- Creating a Maternity Absence Qualification Plan: Worked Example

Accrual Plan Rules: Points to Consider

Configure the following rules when you create an absence accrual plan in accordance with the leave policy of your enterprise:

- Accrual term and frequency
- Plan eligibility
- Enrollment and termination
- Waiting period and vesting period

- Plan limits
- Payments
- Adjustments

Accrual Term and Frequency

An accrual term is a period of time during which workers accrue time. You must specify the type of accrual term to use for the plan. For example, you can define one of these term types:

- An accrual term of one calendar year that restarts on January 1
- An accrual term that starts on the worker's annual hire date and restarts on every anniversary

Plan Eligibility

Associate an eligibility profile with the accrual plan to determine the set of workers who can enroll in that plan.

Enrollment and Termination

Decide when to enroll workers in the accrual plan and choose when to disenroll a terminated worker from the plan.

Waiting Period and Vesting Period

The following table identifies when you want to define waiting and vesting periods.

Period	When to Define
Waiting period	Define if you want newly enrolled workers to accrue time only after a specific amount of time elapses after the enrollment date.
Vesting period	Define if you want newly enrolled workers to accrue time, but not use it until after a specific amount of time.

Plan Limits

Configure the following plan limits:

- Carryover
- Ceiling

For accrual plans, define rules for the maximum leave time that workers can accrue and the maximum leave time that workers can carry over to the next term.

Payments

Decide how you want to calculate payment of accrual balances for the following scenarios:

- When workers must be paid a different rate during the absence period
- When a part of the accrual balance must be disbursed to workers as cash

- When the cost of accrual balance must be calculated to determine employer liability
- When the accrual balance must be paid to workers when their plan participation ends

Adjustments

You can enable the following types of adjustments that HR specialists can make during maintenance of absence records and entitlements:

- Discretionary disbursements of accrual balance
- Accrual balance transfers across plans
- Other adjustments

Accrual Plan Term Types: Critical Choices

When you create an accrual plan, you must select one of the following term types to define an accrual term during which workers accrue leave:

- Calendar year
- Anniversary year

Calendar Year

The accrual term starts on the month, day, and year that you select. The term restarts next year on the same day. For example, if you select January 1, 2015, the accrual term starts on that day and restarts on January 1, 2016.

Anniversary Year

The accrual term starts on the hire date and restarts on each anniversary. For example, if the enrolled worker's hire date is May 1, 2015, the accrual term starts on this date and restarts on May 1, 2016.

Entering a continuous service date when enrolling in the accrual plan doesn't affect the start date. The continuous service date affects the length-of-service calculations while processing a waiting period, vesting period, or plan limits defined in an accrual band matrix. However, it doesn't affect the accrual term.

Accrual Plan Enrollment and Termination: Explained

Workers are enrolled into accrual plans as a result of employment and eligibility and disenrolled from accrual plans when they are terminated or plan eligibility ends. Define when you want to enroll or disenroll a worker in the Participation tab of the Create Absence Plan page.

Configure the plan to:

- Automatically enroll workers when they are hired or when a transfer event occurs.
- Use a formula if you want to consider other aspects or rules to determine when to enroll workers.

Define a waiting period if you want newly enrolled workers to start accruing time under that plan only after a specific amount of time elapses after the date of enrollment.

Configure the plan to automatically disenroll workers as a result of employment termination or loss of eligibility to a plan. On plan termination, define how to:

- Disburse the amount for payment if the worker has a positive absence balance.
- Recover the amount from the last pay if the worker has a negative absence balance.

Absence Plan Eligibility: Explained

An eligibility profile in Absence Management defines criteria used to determine whether a person qualifies for an accrual or qualification absence plan. Define eligibility profiles and then associate it with a plan to determine the set of workers who can enroll in that plan. To associate an eligibility profile with an absence plan:

1. Create the eligibility profile using the Manage Eligibility Profiles task in the Absence Administration work area.
2. Associate the eligibility profile with the absence plan using the Manage Absence Plans task.

If you want all workers to be eligible for the absence plan, then do not add an eligibility profile. If a plan does not have an eligibility profile associated with it, then it does not mean that workers are enrolled automatically into the plan. New hires may be enrolled automatically, if that is the option set in the plan definition. Existing workers have to be enrolled manually.

Accrual Frequency Definition: Critical Choices

Award leave time to workers throughout an accrual term in equal installments known as accrual periods. Determine the frequency of accrual periods by selecting one of the following Accrual Frequency Source values on the Accrual tab in the Create Absence Plan page:

- Person primary frequency
- Repeating time period

Person Primary Frequency

Select **Person Primary Frequency** to award time at the start of each payroll period. For example, if the worker enrolled in the plan receives weekly payroll, the leave time accrues once a week.

Repeating Time Periods

The worker accrues time at the start of each instance in a repeating time period. For example, you created a biweekly repeating period for an annual accrual term. The worker accrues time every two weeks during the term.

You create the repeating time period using the Manage Repeating Time Periods task in the Absence Administration work area. Then, associate the repeating time period with the accrual absence plan on the Create Absence Plan page.

Related Topics

- Repeating Time Periods: Explained

Accrual Plan Limits: Explained

For accrual plans, you can configure the following plan limits:

Plan Limit	Description
Carryover Rule	Determines the maximum time that workers can carry over to the next term.
Ceiling Rule	Determines the maximum leave time that workers can accrue.

Use an accrual band matrix to build criteria using various factors, such as length of service, to determine workers who qualify for specific plan limits. Alternatively, you can use a formula to determine each plan limit.

Accrual Bands: Examples

Use accrual bands to vary accrual benefits to workers depending on employment criteria, such as length of service, grade, or other factors. This topic shows various types of accrual bands that you can define in the Accrual Matrix section on the Create Absence Plan page.

The examples show accrual bands based on the following factors:

- Length of service
- Location and length of service
- Grade

Creating Bands Based on Length of Service

Scenario: You want to create two accrual bands based on worker length of service, as shown in the following table.

Band Sequence	Length of Service	Accrual Rate	Maximum Carryover	Ceiling
1	Less than five years	15	15	45
2	Greater than or equal to five years	20	15	60

To create the bands:

1. Create the following length of service derived factors using the Manage Derived Factors task in the Absence Administration work area.
    - Length of service less than 5 years

- Length of service greater than or equal to 5 years

2. Use the expression builder to create bands using the derived factors that you created:

Band Sequence	Expression
1	[LengthOfService. LessThan5]
2	[LengthOfService. GreaterThan5]

Creating Bands Based on Location and Length of Service

Scenario: You want to create accrual bands of varying length of service for workers who belong to specific geographic locations, as shown in the following table.

Band Sequence	Location	Length of Service	Accrual Rate	Maximum Carryover	Ceiling
1	Paris	Less than five years	15	15	45
2		Greater than or equal to five years	20	15	60
3	Tokyo	Less than three years	10	10	30
4		Greater than or equal to three years	15	15	45

To create the bands:

1. Create the following length of service derived factors for the specific geographic locations using the Manage Derived Factors task in the Absence Administration work area.
   - Length of service less than 5 years
   - Length of service greater than or equal to 5 years
   - Length of service less than 3 years
   - Length of service greater than or equal to 3 years
2. Use the expression builder to create bands using the derived factors that you created:

Band Sequence	Expression
1	[Person. Location] = "Paris" AND [LengthOfService. LessThan5] The person. location attribute is on the Entities tab in the Expression Builder dialog box. The LengthOfService derived factors are available from the Derived tab.
2	[Person. Location] = "Paris" AND [LengthOfService. GreaterThan5]

Band Sequence	Expression
3	[Person. Location] = "Tokyo" AND [LengthOfService. LessThan3]
4	[Person. Location] = "Tokyo" AND [LengthOfService. GreaterThan3]

Creating Date-Effective Accrual Bands Based on Grade

Scenario: Your enterprise wants to change its leave policies every year in accordance with government regulations, as shown in the following table.

Band Sequence	Effective Start Date	Grade Range	Accrual Rate	Maximum Carryover	Ceiling
1	April 1, 2014	A1 - A3	15	15	45
2		A1 - A6	20	15	60
3	April 1, 2015	A1 - A3	20	20	30
4		A1 - A6	25	15	40

Set the session effective date to April 1, 2014 and create band 1 and band 2 using the following expressions:

Band Sequence	Expression
1	[Person.Grade] >= "A1" AND [Person. Grade] <= "A3" The person.grade attribute is on the Entities tab in the Expression Builder dialog box.
2	[Person.Grade] >= "A4" AND [Person. Grade] <= "A6"

Save your work and set the session effective date to April 1, 2015. Then, create band 3 and band 4 using the same expressions that you used for band 1 and band 2:

Band Sequence	Expression
1	[Person.Grade] >= "A1" AND [Person. Grade] <= "A3"
2	[Person.Grade] >= "A4" AND [Person. Grade] <= "A6"

Accrual Balance Adjustments: Points to Consider

Depending on your access, you can select the following accrual plan balance adjustment options:

- Adjust balance
- Transfer balance
- Disburse balance
- Update balance details

You can select these balance adjustment options on the Enrollment and Adjustments menu of the Plan Participation section on the Manage Absence Records and Entitlements page.

Adjust Balance

Use this option to make special adjustments to plan balances, such as award leave time to a worker for exemplary performance at work.

Transfer Balance

Use this option to select a source plan and specify an amount of time to transfer to a target plan balance. Before you make this adjustment, review the plan balances of the source and target plans on the Manage Absence Records and Entitlements page. This helps determine if the worker has enough time in the source plan balance that you can transfer to the new plan balance.

Disburse Balance

Use this option to pay out a part of the plan accrual balance to the worker.

Update Balance Details

Use this option to update the adjustment value and reason, such as removing an incorrect adjustment value or updating the adjustment reason as clerical error.

Enabling Accrual Balance Adjustment Options: Critical Choices

Use the Entries and Balances tab on the Manage Absence Plans page to enable the following types of accrual plan adjustments:

- Accrual balance transfers across plans
- Discretionary disbursements of accrual balance
- Other adjustments

When you enable these adjustments, it then allows HR specialists to make adjustments to plan balances on the Manage Absence Records and Entitlements page. To make adjustments, HR specialists can select an option on the Enrollments and Adjustments menu of the Plan Participation section.

Accrual Balance Transfers Across Plans

This adjustment option enables HR specialists to select a source plan and specify an amount of time to transfer to a target plan balance.

Discretionary Disbursements of Accrual Balance

This adjustment option enables HR specialists to pay out a part of the plan's accrual balance to the worker. If you select this option, you must also select a disbursement rate rule in the Rates section to determine how to calculate the payment.

Other Adjustments

This adjustment option enables HR specialists to make special adjustments to plan balances, such as award leave time to a worker for exemplary performance at work. When HR specialists make adjustments on the Manage Absence Records and Entitlements page, they can select Clerical or Compensatory as the adjustment reason.

Creating a Vacation Accrual Plan: Worked Example

This example shows how to create an absence accrual plan for vacation leave. The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
Who is eligible for this plan?	All workers
What unit of measure should this plan use to process absences?	Days
What is the start date and length of the accrual plan term?	Start on January 1 and restart the same day in the following year.
When can workers start accruing leave time on the plan?	1 month after hire date
When can workers start using the leave time that they accrued	2 months after hire date
How much leave time can workers accrue in a term?	Workers who belong to grade A and B accrue at the rate of 15 days each accrual term. They can carry-over 5 days to the next term. Workers who are grade C and D accrue at the rate of 12 days each accrual term. They can carry-over 2 days to the next term.
Do you want workers to accrue time for the whole term at once or accrue in increments?	Accrue time each pay period.

Decisions to Consider	In This Example
What is the maximum leave time that workers can accrue?	40 days
Can workers use more time than their standard accruals during the plan term?	Yes, up to 5 days
How do you want to calculate cash disbursals of partial accrual balances at any time?	50 percent of the salary amount determines the payment for a unit of absence.
How do you want to calculate final balance payments for a terminated worker?	The salary amount determines the payment of a unit of absence.

Task Summary

To create the absence plan:

1. Create two rate definitions and a payroll element.
2. Create the absence plan.

Prerequisites

Before you create the absence plan, in the Absence Administration work area:

1. Use the Manage Rate Definitions task to create two rate definitions that calculate payment of a unit of absence based on 50 percent and 100 percent of the salary amount.
2. Use the Manage Elements task to create a nonrecurring element. Specify Absences as the primary classification and Vacation as the secondary classification in the Create Element dialog box, and complete the sections as shown in this table.

Section	Value
Absence Plan Details	Select **Accrual Balances and Absences** as the type of absence information to transfer to payroll.
Accrual Liability and Balance Payments	Select **Yes** for these questions: ◦ Calculate Absence Liability? ◦ Does this plan enable balance payments when enrollment ends? ◦ Does this plan enable partial payments of absences? You must specify a rate for the liability calculation, which should be the same rate specified as the liability booking rate rule in Absence Management.
Absence Payments	Select the **Reduce regular earnings by absence payment** option for the following question: ◦ How do you want to reduce earnings for employees not requiring a time card?

Creating the Rate Definitions

1. In the Absence Administration work area Tasks panel drawer, click **Manage Rate Definitions**.
2. Click **Create**.
3. On the Create Rate Definition page, complete the fields, as shown in this table.

Field	Value
Name	Unit Rate of 50 Percent Salary
Short Name	UR_ 50_PC_Salary
Legislative Data Group	Select your legislative data group.
Periodicity (Returned Rate Details section)	Bimonthly
Balance Dimension	Year to Date
Periodicity (Calculation section)	Bimonthly

4. Click **Create**.
5. On the Create Rate Contributors page, complete the fields, as shown in this table.

Field	Value
Balance Name	FIT Gross
Balance Dimension	Year to Date
Type	Actual
Add or Subtract	Add
Factor Rule	Value
Factor Value	0.50

6. Click **Save and Close**.
7. Repeat step 2 through step 6 to create another rate definition. Ensure that you provide the following key information, as shown in this table:

Field	Value
Name	Unit Rate of Salary

Field	Value
Short Name	UR_ Full_Salary
Factor Value	1.00

Creating the Absence Plan

1. In the Absence Administration work area Tasks panel drawer, click **Manage Absence Plans**.
2. Click **Create**.
3. In the Create Absence Plan dialog, complete the fields, as shown in this table.

Field	Value
Legislation	Select your legislation.
Plan Type	Accrual

4. Click **Continue**.
5. On the Create Absence Plan page, complete the fields, as shown in this table.

Field	Value
Plan	Vacation
Legislative Data Group	Select your legislative data group.
Status	Active
Plan UOM	Days
Type	Calendar year
Calendar	Select the first day of your plan term year. In this example, select January 1 of the current year.

6. Click **Save**.
7. Select the Participation tab, and complete the fields, as shown in this table.

Field	Value
Waiting Period UOM	Months
Duration	1

8. Click **Save**.
9. Select the Accruals tab, and complete the fields, as shown in this table.

Field	Value
Accrual Method	Incremental
Accrual Frequency Source	Person primary frequency
Accrual Vesting Rule	Elapsed period
Duration	2
UOM	Months
Ceiling Rule	Flat amount
Ceiling	40
Carryover Rule	Include in matrix
Negative balance allowed	Select
Negative Balance Limit	5

10. In the Accrual Matrix section, create accrual bands, as shown in this table.

Sequence	Expression	Accrual Rate	Carryover Limit
1	([Person. Grade] = "A") OR ([Person. Grade] = "B")	15	5
2	([Person. Grade] = "C") OR ([Person. Grade] = "D")	12	2

11. Click **Save**.
12. Select the Entries and Balances tab, and complete the fields, as shown in this table.

Field	Value
Final Balance Payment Rate Rule	Select the Unit Rate of Salary rate definition that you created.
Disbursement Rate Rule	Select the Unit Rate of 50 Percent Salary rate definition that you created.
Absence Payment Rate Rule	Select the Unit Rate of Salary rate definition that you created.
Liability Booking Rate Rule	Select the Unit Rate of Salary rate definition that you created.

Field	Value
Transfer absence payment information for payroll processing	Select
Element	Select the element that you created as part of the prerequisite task.

13. Review the information you entered in all the tabs.
14. Click **Save and Close**.

Related Topics

- Creating Payroll Elements for an Absence Accrual Plan: Worked Example

6 Qualification Absence Plans

Absence Plan Types: Critical Choices

Create accrual plans, qualification plans, and no entitlement plans using the Manage Absence Plans task in the Absence Administration work area.

Accrual

Use this type to create absence plans that enable workers to accrue time for taking paid leave, such as a vacation plan. Configure rules that determine various aspects of leave time, such as:

- Length and type of the accrual term in which workers accrue time
- Maximum time that workers can accrue in a term
- Maximum time that workers can carry forward to the next term

Qualification

Use this type to create an absence plan where workers qualify for the plan and receive payments during the absence period. For example, use qualification plans for defining absence rules related to events, such as long term illness or maternity. Configure rules to determine the payment percentages that apply for specific periods during the absence, for specific workers.

No Entitlement

Create absence plans of this type to track paid or unpaid absences without maintaining an accrual balance or providing leave entitlements, such as periodic accruals. Similar to an accrual plan, you can define the length and type of the plan term and determine when eligible workers can enroll in the plan. You can also use plans of this type in combination with a qualification plan. For example, use a no-entitlement plan to pay workers if they are not eligible for a standard maternity absence qualification plan.

Related Topics

- Creating a Vacation Absence Accrual Plan: Worked Example

Qualification Plan Rules: Points to Consider

Configure the following rules when you create an absence qualification plan in accordance with the leave policy of your enterprise:

- Plan term
- Plan eligibility
- Enrollment and termination

- Payments

Plan Term

A qualification plan term is an assessment period for which the Evaluate Absence process calculates entitlements for the total absent time recorded in that period. When you create an absence qualification plan, you must select the type of plan term. For example, you can limit the duration of the plan term to the duration of the absence.

Plan Eligibility

Associate an eligibility profile with the qualification plan to determine the set of workers who are eligible to record an absence that belongs to that plan.

Enrollment and Termination

Decide when to enroll workers in the qualification plan. Also, decide whether ongoing payments under this plan must continue if a worker is terminated or loses eligibility for the plan.

Payments

Use an entitlement band matrix to determine the payment percentages that apply for specific time periods during an absence. Decide how you want to calculate the payment rate of a single unit of absence. You can use a rate definition to include the calculation rules, or use a formula. For example, you want workers who have completed a particular tenure to receive specific percentage of pay for a specific absence period.

The following table shows a sample scenario:

Length of Service	Payment Rule
5 to 10 years	75 percent up to 10 absent days.
10 to 20 years	75 percent up to 20 absent days.

Decide how you want to calculate the payment rate of a single unit of absence. You can use a rate definition to include the calculation rules, or use a formula.

Qualification Plan Term Types: Critical Choices

A qualification plan term is an assessment period during which absence entitlement for the total absent time recorded in that period is considered. When you create a qualification absence plan using the Manage Absences Plans task, you must select one of the following plan term types:

- Calendar year
- Rolling backward
- Rolling forward
- Absence duration

Calendar Year

The qualification plan term starts on the month, day, and year that you select. The duration of the term is one year. For example, if you select January 1, 2015, the qualification term starts on that day and ends on December 31, 2015.

Rolling Backward

A rolling-backward term calculates absence entitlements based on the total duration of absences for a specific time period that precedes the absence start date. For example, if you specify a one year rolling period, and the worker's absence start date is January 1, 2015, then the calculation considers absences scheduled from January 2, 2014. You can also configure rules to determine how to deal with absences that overlap rolling backward terms.

Rolling Forward

A rolling forward term calculates absence entitlements based on the first date a worker's absence begins and calculates the end date by adding the term duration to the start date. For example, if the term duration is 365 days and the absence start date is 12 February, then the end date will be 11 February of the following year. The rolling forward option evaluates absences between this start date and end date to track plan entitlements for that period.

Absence Duration

The absence duration determines the qualification plan term. For example, if a worker schedules a maternity absence from January 1, 2015 to April 15, 2015, then that is the duration of the qualification plan term.

Qualification Plan Term Overlap Rules: Critical Choices

When you define a rolling backward plan term for an absence qualification plan, you must select an overlap rule that determines how to deal with absences where only a partial period overlaps the current term. The examples in this topic will help you understand how you can use the:

- Include rule to assess absences that overlap current and previous terms
- Exclude rule to ignore the entire absence that overlaps the current and previous terms
- Split rule to assess absences falling within the current term only

The Include Rule

If an absence overlaps the beginning of the rolling period, you consider the entire absence in the current assessment period.

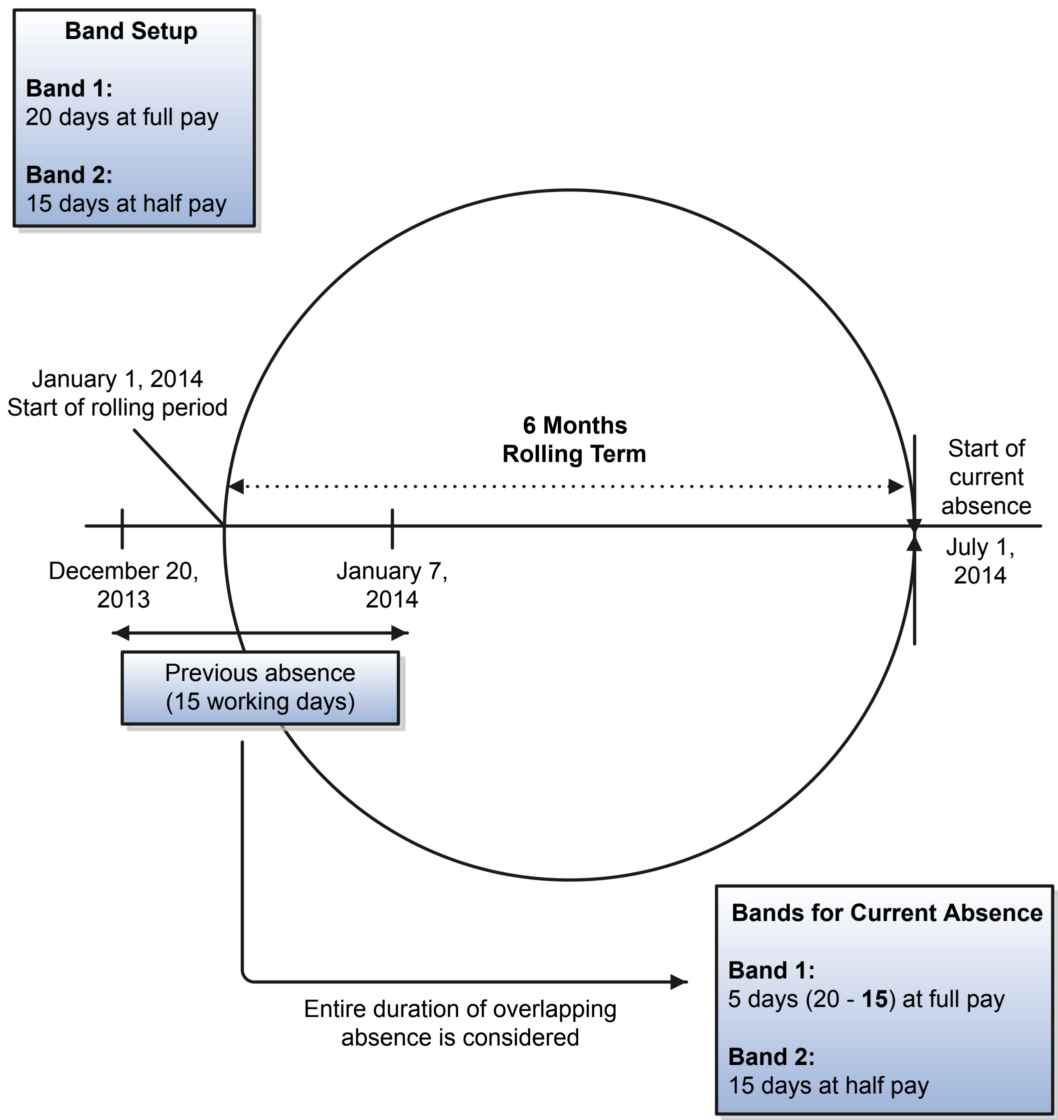
Scenario: You defined a six-month rolling-backward term in your qualification plan and set up bands that entitle workers to 20 days absence at full pay and a further 15 days at half pay.

- The assessment period for a worker began on January 1, 2014.
- The worker starts sick leave on July 1, 2014.

Previously, the worker received payment under the same sick leave entitlement plan for 15 working days from December 20, 2013 to January 7, 2013.

Because you configured the plan term to use the Include rule, the previous absence that overlaps the current assessment period is considered. So for the absence beginning on July 1, 2014, the worker receives full pay for the first 5 (20 - 15) days of the absence and half-pay for the next 15 days.

The following figure shows the usage of the Include rule in this scenario.



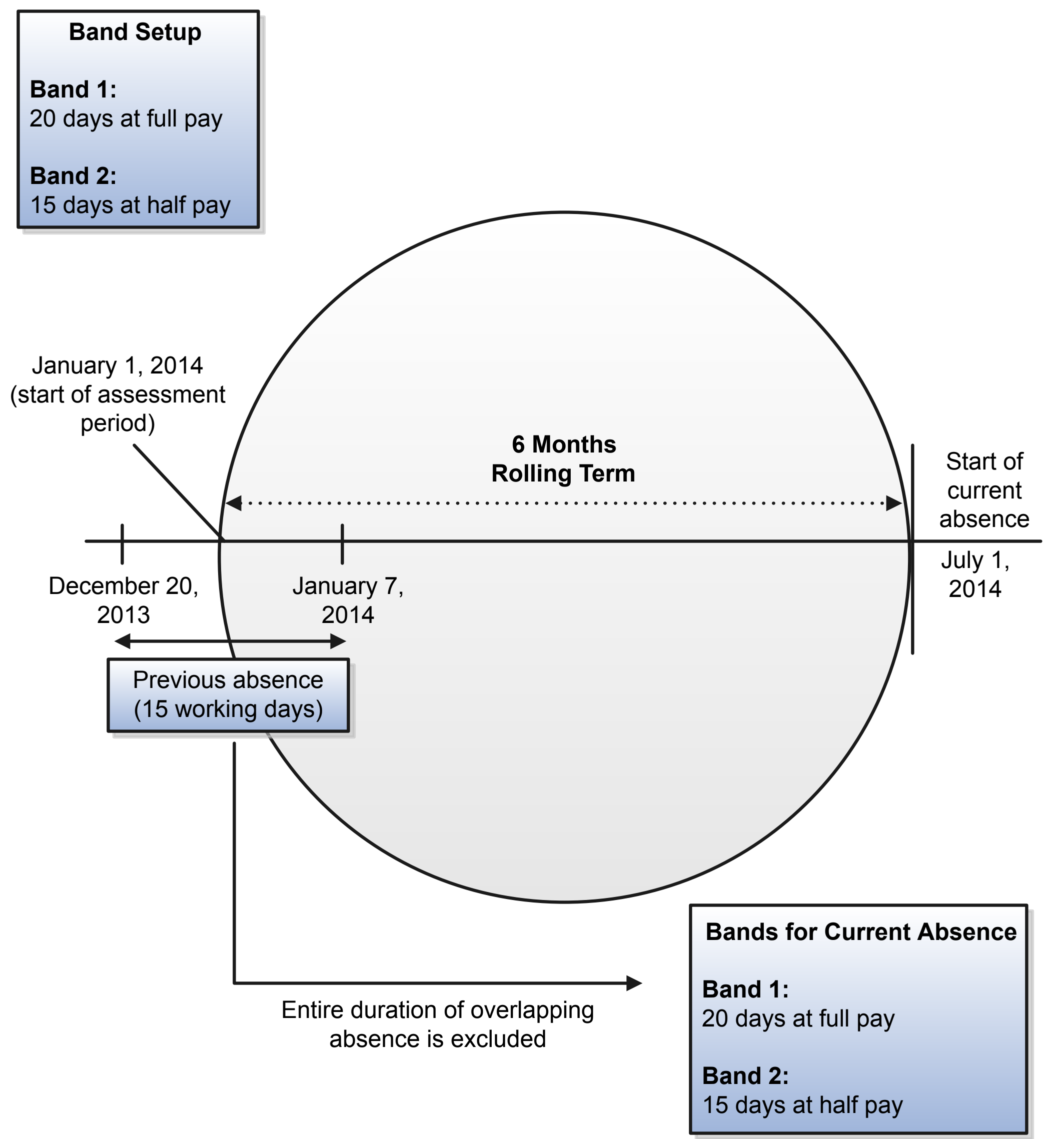
The Exclude Rule

If a worker is absent at the beginning of an assessment period, this rule ignores the entire absence that overlaps the period. In the example used in the previous scenario, for a rolling backward term that uses the Exclude rule, the worker receives:

- Full pay for the first 20 days of the absence
- Half pay for the next 15 days

Even though the previous absence overlaps the current assessment period, the worker receives the entitlement band benefits for the current absence without any deductions.

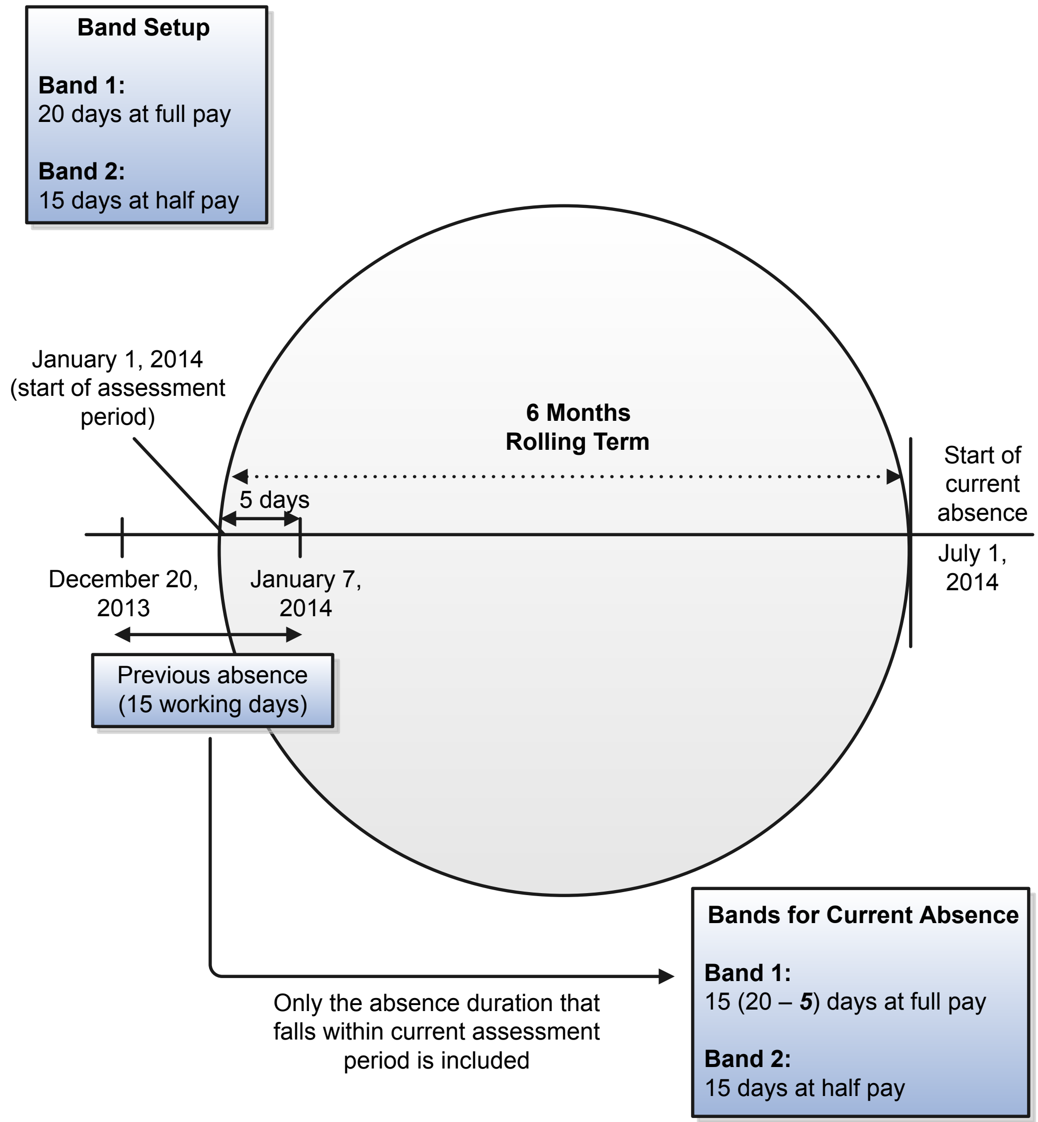
The following figure shows the usage of the Exclude rule in this scenario.



The Split Rule

This rule assesses overlapping absences that fall within the current plan term only. In the example used in the previous scenario, for a qualification plan that uses the Split rule, the worker receives full pay for the first 15 (20 - 5) days of the absence and half pay for the next 15 days.

The following figure shows the usage of the Split rule in this scenario.



Qualification Enrollment and Termination Rules: Explained

Define when you want to enroll or disenroll a worker in the Participation tab of the Create Absence Plan page. Workers qualify for qualification plan entitlements as a result of an event, such as childbirth. These entitlements stop when workers are terminated or plan eligibility ends. Configure the plan to:

- Enroll workers in the plan when a worker or an administrator schedules an absence using an absence type associated with a qualification plan.
- Use a formula if you must consider other aspects or rules that determine when to enroll workers in the plan.

Decide whether ongoing payments under this plan must continue if a worker is:

- Terminated
- Not terminated, but loses eligibility for the plan

Absence Plan Eligibility: Explained

An eligibility profile in Absence Management defines criteria used to determine whether a person qualifies for an accrual or qualification absence plan. Define eligibility profiles and then associate it with a plan to determine the set of workers who can enroll in that plan. To associate an eligibility profile with an absence plan:

1. Create the eligibility profile using the Manage Eligibility Profiles task in the Absence Administration work area.
2. Associate the eligibility profile with the absence plan using the Manage Absence Plans task.

If you want all workers to be eligible for the absence plan, then do not add an eligibility profile. If a plan does not have an eligibility profile associated with it, then it does not mean that workers are enrolled automatically into the plan. New hires may be enrolled automatically, if that is the option set in the plan definition. Existing workers have to be enrolled manually.

Qualification Bands: Examples

Use qualification bands to determine the payment percentages that workers receive for specific time periods during a long leave of absence. Use employment criteria, such as length of service, grades, or other factors to filter workers. This topic shows various types of qualification bands that you can define in the Qualification Band Matrix section on the Create Absence Plan page.

The examples show qualification bands based on the following factors:

- Length of service
- Grade
- Length of service and grade

Creating a Single Payment Band for Multiple Length of Service Ranges

Scenario: You want to create a single payment band for workers who have completed the following years of service:

- For workers who have completed between 5 and 10 years of service to receive 75 percent of pay for up to 10 days of absence
- For workers who have completed between 11 and 20 years to receive the same pay percentage, but up to 20 days of absence

To create the bands:

1. Create the following length of service derived factors using the Manage Derived Factors task in the Absence Administration work area.
    - Length of service greater than or equal to 5 years and less than 10 years

- Length of service greater than or equal to 10 years and less than 20 years

2. Use the expression builder in the Qualification Band Matrix section to create bands using the derived factors that you created:

Band Sequence	Expression
1	[LengthOfService. GreaterThan5LessThan10]
2	[LengthOfService. GreaterThan10LessThan20]

For each band that you create in the Qualification Band Matrix section, you must create band details in the Qualification Details section.

This table shows the band details that you must create for Band 1, which you created for workers who have completed between 5 and 10 years of service.

Band Sequence	Detail Name	Duration	Payment Percentage
1	75 percent up to 10 days of absence	10	75

This table shows the band details that you must create for Band 2, which you created for workers who have completed between 10 and 20 years of service.

Band Sequence	Detail Name	Duration	Payment Percentage
1	75 percent up to 20 days of absence	20	75

Creating Multiple Payment Bands for a Grade Range

Scenario: You want all workers who belong to grade A1 and above to receive:

- 100 percent of pay for up to 10 days of leave
- 75 percent of pay for up to a further 15 days of leave

This table shows the band information that you create using the expression builder in the Qualification Band Matrix section.

Band Sequence	Expression
1	[Person.Grade] >= "A1" The person.grade attribute is on the Entities tab in the Expression Builder dialog box.

This table shows the band details that you must create for Band 2 in the Qualification Details section

Band Sequence	Detail Name	Duration	Payment Percentage
1	100 percent pay up to 10 days of absence	10	100
2	75 percent pay for the next 15 days	15	75

Creating Multiple Payment Bands for Multiple Length of Service and Grade Ranges

Scenario: You want workers who have completed the following years of service:

Length of Service	Payment Percentage
Less than 5 years	To be eligible for: • 75 percent of pay for up to 10 days of absence • 50 percent of pay for a further 15 days of absence
Greater than or equal to 5 years and who belong to the A1 grade	To be eligible for: • Full pay up to 10 days of absence • 75 percent of pay for a further 15 days of absence

To create the bands:

1. Create the following length of service derived factors using the Manage Derived Factors task in the Absence Administration work area.
    - Length of service less than 5 years
    - Length of service greater than or equal to 5 years
2. Use the expression builder in the Qualification Band Matrix section to create bands using the derived factors that you created:

Band Sequence	Expression
1	[LengthOfService. LessThan5]
2	[LengthOfService. GreaterThan5] AND [Person. Grade] "A1"

This table shows the band details that you must create for Band 1 in the Qualification Details section.

Band Sequence	Detail Name	Duration	Payment Percentage
1	75 percent pay up to 10 days of absence	10	75
2	50 percent pay for the next 15 days	15	50

This table shows the band details that you must create for Band 2 in the Qualification Details section.

Band Sequence	Detail Name	Duration	Payment Percentage
1	100 percent pay up to 10 days of absence	10	100
2	75 percent pay for the next 15 days	15	75

Evaluating Entitlement without Absence Record: Explained

You use the **Evaluate remaining entitlement without absence record** check box to determine how the Manage Absences and Entitlements page displays entitlements. The check box is available on the Participation tab of the Create Absence Plan page. The following table outlines the impact of the check box on the display of information in the Manage Absences and Entitlements page:

Check Box Value	Actions Available for HR Specialist
Selected	View complete qualification plan entitlement details defined for the worker, even without an absence record
Not selected	View partial plan entitlement details of scheduled absences with different payment percentages. They can't view the plan period, qualified entitlement, and remaining entitlement. HR specialists can view partial plan entitlements in the following scenarios: • Worker applied for only a single absence for the plan • Worker applied for multiple absences and all of the absences are falling in the same payment percentage • Worker applied for multiple absences and all of the absences are falling in different payment percentages If the worker hasn't scheduled any absence for the plan, the Qualification Plans section of the Manage Absences and Entitlements page displays no plan details.

Qualification Plan Entitlement: How It Appears

For qualification plans, the qualified entitlement details for a worker are displayed in the Qualification Plans section of the Manage Absences and Entitlements page. The payment percentage defined during plan setup determines the calculation of these qualified entitlements.

Settings That Affect Display Of Qualification Plan Entitlement

To view all qualified entitlement details, you must select the **Evaluate remaining entitlement without absence record** check box. This check box is available on the Participation tab of the Manage Absences Plans page. If you don't select the check box during plan creation, you can view only the payment percentage and used entitlement in the Qualification Plans section. No data appears for the plan period, qualified entitlement, and remaining entitlement columns.

How Qualification Plan Entitlement Is Calculated

Scenario: You defined a one-year rolling backward term in your qualification plan. You set up bands that entitle workers to 30 days absence at full pay and an additional 30 days at half pay.

A worker took an absence for 88 days, from June 1, 2015 to September 30, 2015. The Qualification Plans section displays the following qualified entitlements for an effective date of Sep 30, 2015 (Plan period will be Oct 01, 2014 - Sep 30, 2015):

Plan	Plan Period	Payment Percentage	Qualified Entitlement	Used	Remaining
Sick Leave		100	30	30	0
Sick Leave		50	30	30	0

The worker schedules another absence using the same plan from September 1, 2016 to September 30, 2016 for 22 days. Since you defined a one-year rolling backward term, the details considered for the 365 day time period that precedes the absence start date are:

Decisions to Consider	In This Example
Rolling backward start date	September 2, 2015
Used entitlements during the rolling backward time period	21 days at 0 percent (September 1, 2015 to September 30, 2015)
Available entitlements	30 working days at 100 percent, and the next 30 working days at 50 percent

For the 22-day absence from September 1 through September 30, 2016, the worker qualifies for full payment. The Qualification Plans section displays the following qualified entitlement for an effective date of Sep 30, 2016 (Plan period will be Oct 01, 2015 - Sep 30, 2016):

Plan	Plan Period	Payment Percentage	Qualified Entitlement	Used	Remaining
Sick Leave		100	30	22	8
Sick Leave		50	30	0	30

If you don't select the **Evaluate remaining entitlement without absence record** check box during plan creation, the qualified entitlements appear as shown in the following table:

Plan	Plan Period	Payment Percentage	Qualified Entitlement	Used	Remaining
Sick Leave		100		22	

Creating a Maternity Qualification Plan: Worked Example

This example shows how to create an absence qualification plan for employees taking maternity leave.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
Who is eligible for this plan?	Only full time regular employees
What unit of measure should this plan use to process absences?	Weeks
What is the plan term to assess entitlements?	6 months, rolling backward from the absence start date
How do you deal with absences that overlap the plan term?	Use the Include rule to assess the entire absence.
How do you deal with terminated workers and workers who lose eligibility while receiving entitlements from the plan?	Continue entitlements if worker is terminated. Stop entitlements if worker loses eligibility.
For how much leave time are workers entitled to receive payment?	Workers who have completed less than 5 years of service are entitled to 8 weeks payment at 90 percent pay followed by a further 16 weeks at 50 percent pay. Workers who have completed more than 5 years of service are entitled to receive payment for the first 6 weeks at full pay followed by 12 weeks at 75 percent pay.
How do you want to calculate payments?	The declared salary determines the payment of a unit of absence.

Decisions to Consider	In This Example
Transfer payments for payroll processing?	Yes

Prerequisites

Before you create the absence plan, in the Absence Administration work area:

1. Use the Manage Eligibility Profiles task to create a participant eligibility profile to restrict eligibility of the absence plan to full time regular workers. In the Employment tab, Assignment Category subtab, select Full-time regular from the Full Time or Part Time list.
2. Use the Manage Derived Factors task to create length of service derived factors. Don't create a qualification absence plan with multiple expression builders where all expression builders are satisfied. If there is a specific scenario, create multiple plans instead of multiple expression builders.
3. Use the Manage Rate Definitions task to create a rate definition for payment of a unit of absence based on the declared salary on the absence start date.
4. Use the Manage Elements task to create a nonrecurring element. Use Absences as the primary classification and Maternity as the secondary classification. In the Absence Plan Details section, select Qualification Absences as the type of absence information you want transferred to payroll.

Creating the Length of Service Derived Factors

1. In the Absence Administration work area Tasks panel drawer, click **Manage Derived Factors**.
2. In the Length of Service tab, click **Create**.
3. In the Create Derived Factor Length of Service dialog box, complete the fields, as shown in this table.

Field	Value
Name	LengthOfService_ LessThan5
Unit of Measure	Years
Less Than Length of Service	5
Period Start Date Rule	Date of hire
Determination Rule	As of event date

4. Click **Save and Create Another**.
5. Complete the fields, as shown in this table.

Field	Value
Name	LengthOfService_ GreaterThan5

Field	Value
Unit of Measure	Years
Greater Than or Equal to Length of Service	5
Period Start Date Rule	Date of hire
Determination Rule	As of event date

6. Click **Save and Close**.

Creating the Rate Definition

1. In the Absence Administration work area Tasks panel drawer, click **Manage Rate Definitions**.
2. Click **Create**.
3. On the Create Rate Definition page, complete the fields, as shown in this table.

Field	Value
Name	Maternity Leave
Short Name	MAT LEAVE
Legislative Data Group	Select your legislative data group.
Periodicity (Returned Rate Details section)	Bimonthly
Balance Dimension	Year to Date
Periodicity (Calculation section)	Bimonthly

4. Click **Create**.
5. On the Create Rate Contributors page, complete the fields, as shown in this table.

Field	Value
Balance Name	FIT Gross
Balance Dimension	Year to Date
Type	Actual
Add or Subtract	Add

Field	Value
Factor Rule	Value
Factor Value	1.00

6. Click **Save and Close**.

Creating the Absence Plan

1. In the Absence Administration work area Tasks panel drawer, click **Manage Absence Plans**.
2. Click **Create**.
3. In the Create Absence Plan dialog box, complete the fields, as shown in this table.

Field	Value
Legislation	Select your legislation.
Plan Type	Qualification

4. Click **Continue**.
5. On the Create Absence Plan page, complete the fields, as shown in this table.

Field	Value
Plan	Maternity
Legislative Data Group	Select your legislative data group.
Status	Active
Plan UOM	Weeks
Type	Rolling backward
Term Duration	6
Term Duration UOM	Months
Start Rule	Absence Start Date
Overlap Rule	Include

6. Click **Save**.
7. Click the Participation tab, and complete the fields, as shown in this table.

Field	Value
On Loss of Plan Eligibility Only, Terminate Entitlement	Select
Eligibility	Select and add the eligibility profile that you created as part of the prerequisite task.

8. Click **Save**.

Defining an Entitlement Matrix for the Maternity Plan

1. Click the Entitlements tab.
2. In the Entitlement Attributes section, select **Matrix**.
3. In the Qualification Band Matrix section, click **Add** to add a row.
4. In the **Sequence** field, enter 1.
5. Click the **Expression Builder** icon.
6. In the Derived tab, expand Length of Service, and select **LengthOfService_LessThan5**.
7. Click **Insert Into Expression**.
8. Click **OK**.
9. In the Create Absence Plan page, click **Save**.
10. Repeat step 11 through step 17. Ensure that you provide the following key information, as shown in this table:

Field	Value
Sequence	2
Derived factor to select in the expression builder	LengthOfService_ GreaterThan5

11. In the Qualification Band Matrix section, click the **LengthOfService_LessThan5** row.
12. In the Qualification Details section, complete the fields, as shown in this table.

Sequence	Detail Name	Duration	Payment Percentage
1	8 weeks at 90 percent pay	8	90
2	16 weeks at 50 percent pay	16	50

13. In the Qualification Band Matrix section, click the **LengthOfService_GreaterThan5** row.
14. In the Qualification Details section, complete the fields, as shown in this table.

Sequence	Detail Name	Duration	Payment Percentage
1	6 weeks at full pay	6	100
2	12 weeks at 75 percent pay	12	75

Sequence	Detail Name	Duration	Payment Percentage

15. Click **Save**.
16. Click the Entries and Balances tab, and complete the fields as shown in this table.

Field	Value
Absence Payment Rate Rule	Select the Maternity Leave rate definition that you created.
Transfer absence payment information for payroll processing	Select
Element	Select the element that you created as part of the prerequisite task.

17. Review the information you entered in all the tabs.
18. Click **Save and Close**.

Related Topics

- Creating Payroll Elements for Processing Absences: Procedure

7 Absence Certifications

Absence Certification Requirement Components: Points to Consider

Configure absence certification requirements as action items that workers must complete to continue receiving entitlements during an absence period. Requirement components include type, trigger, and actions. Configuring absence certification is a two-step process in the Absence Administration work area:

1. Configure the certification requirements using the Manage Absence Certifications task.
2. Associate the certification requirements with an absence type on the Action Items tab of the Create Absence Type page. When workers schedule an absence, they are subject to the certification requirements.

Certification Components

When you create a certification requirement, you configure the following aspects:

- Requirement type
- Requirement trigger
- Requirement phases and actions
- Requirement status during absence recording
- Entitlement reevaluations

Absence Certification Requirement Type: Points to Consider

Configure the certification requirements using the Manage Absence Certifications task. When you create a certification requirement, you must configure the following certification requirement types:

- Classification
- Absence Record Update Rule

Classification

Select one of the following to define an absence certification requirement:

Classification	Purpose
Documentation	Track documentation related to a worker's absence.
Entitlement	Update payment percentages for qualification plans.

Absence Record Update Rule

Select one of the following to define an absence certification requirement:

Absence Record Update Rule	Description
Authorization	Select this rule if workers must complete an action item to receive entitlements. For example, you can mandate workers to submit certain medical reports and other documents to continue to receive entitlements for the absence period.
Timeliness	Select this rule to define the actions to take depending on when workers notify their managers about their absence. For example, you might want to revise entitlements for workers who have provided a late notification of their absence.
Other	Select this rule if you want to consider other special requirements. For example, you can define a certification requirement that HR specialists can initiate at any time to retract absence entitlements for a worker whose employment ends.

Absence Certification Requirement Trigger: Points to Consider

When you create an absence certification requirement, you must configure the certification requirement rules to determine when the certification requirement takes effect.

Certification Requirement Trigger

Use one of the following rules to determine when the certification requirement takes effect:

Rule	Description
On demand	HR specialists add the certification requirement as an action item when they record an absence for a worker on the Manage Absence Records and Entitlements page.
On the absence start date	The certification requirement appears as an action item in the Edit Absence dialog box on the Manage Absence Records and Entitlements page.

HR specialists can set the status of the action item when the worker provides the required documents or other information.

Absence Certification Requirement Phases and Actions: Points to Consider

When a worker schedules an absence that is subject to a certification requirement, decide what actions to take in each of the following phases of the requirement:

Phase	Description
On creation	When the certification requirement takes effect. Sometimes your certification requirement might not require any action from the worker to complete it. For example, you might want to retract entitlements from a terminated worker when there is no further action required from the worker. In that case, you can configure the certification requirement to complete automatically when it becomes effective.
On passage of due date	When the certification requirement is past its due date.
On completion	When HR specialists evaluate the action item corresponding to the certification requirement and mark it complete.

For each phase, you can perform the following actions:

- Set the certification status that appears during absence recording.
- Reevaluate entitlements.

Certification Status during Absence Recording

When you create an authorization requirement or a timeliness requirement, a corresponding Update Status field, known as the target field appears in the Actions section. The following table shows the specific status field on the absence recording page for each requirement type:

Requirement Type	Target Status Field
Authorization requirement	Primary Certification Authorized
Timeliness requirement	Late Notification Override

In the Actions section of page, you specify the update status value in the target field for each phase of the requirement. For example, you can configure the target field on the absence recording page to display True when a worker provides the required documents to complete a certification requirement.

Entitlement Reevaluations

Depending on the status of the certification requirement, you can reevaluate entitlements that a worker receives during the absence period. Reevaluate entitlements as of the absence start date or the action date.

For example, you can change the worker's entitlement to half pay as of the absence start date when a certification requirement has passed its due date. When the worker completes the requirement, you can recalculate the entitlements from the absence start date or the completion date.

Use any of these rules to calculate entitlements:

Rule	Description
Override	Enables entry of a revised payment percentage that overrides the absence plan payment rules.
Recalculate	Calculates payments according to the absence plan payment rules.
Retract	Stops payments.

Creating an Absence Certification Requirement: Worked Example

This example contains steps to create an absence certification requirement for workers on long term sickness leave. The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
What action do you want workers to take to complete the certification requirement?	Submit a doctor's certificate to the manager within 14 calendar days of their absence start date.
What action do you want to take if workers don't complete the requirement within the stipulated time?	Revise entitlement for the rest of the absence period to 75 percent of pay.
When do you want the certification requirement to take effect?	On the absence start date
How do you want to configure the value of the Primary Certification Authorized field during absence recording?	Set status to True when the: • Certification requirement initiates on the absence start date • Worker completes the certification requirement Set status to False when the due date of the certification requirement passes.

Creating a Certification Requirement

1. In the Absence Administration work area Tasks panel drawer, click **Manage Absence Certifications**.
2. Click **Create**.
3. On the Create Absence Certification page, complete the fields, as shown in this table.

Field	Value
Name	Doctor's Certificate
Type	Authorization
Status	Active
Trigger	On initial absence entry
Due Date Rule	Waiting period
Waiting Period Start Date	Absence start date
Duration	14
UOM	Calendar days
Classification	Entitlement

4. In the On Creation section, set the Target Field Update status to **True**.
5. In the On Passage of Due Date section, complete the fields, as shown in this table.

Field	Value
Target Field Update	False
Entitlement Reevaluation Rule	As of action date
Entitlement Update Rule	Override
Revised Payment Percentage	75

6. In the On Completion section, set the Target Field Update status to **True**.
7. Click **Save and Close**.

8 Integrated Workbooks for Loading Absence Data

Integrated Workbooks for Absence Management: Points to Consider

Use integrated Microsoft Excel workbooks to upload multiple records at one time for various Absence objects, such as:

- Absence records
- Absence plans
- Absence types
- Absence categories
- Absence reasons
- Absence certifications

Use the Initiate Spreadsheet Load task of the Data Exchange work area to use the absence spreadsheets.

All Absence Spreadsheets

You can only create absence business objects using the spreadsheets. You can't edit existing absence objects.

Absence Records Spreadsheet

You can create and load absence records only for the **Generic absence** and the **Illness or injury** pattern. You can't load absence records for absence types with the **Childbirth or placement** pattern.

Absence Plans Spreadsheet

Consider the following points when you enter data in the spreadsheet:

- You must enter the start month and start date to define the plan term.
- You can associate only one eligibility profile with an absence plan.
- You can create only one accrual band for an accrual plan.
- You can associate only one qualification band and only one band detail with a qualification plan.
- When you enter adjustment reasons, you must enter their corresponding codes separated by commas.
- When you associate a rate definition with an absence plan, you must enter the corresponding rate definition ID.

Absence Types Spreadsheet

Consider the following points when you enter data in the spreadsheet:

- You must enter the legislative data group ID.

- You can associate a maximum of five absence plans with an absence type.
- You can associate a maximum of five absence certifications with an absence type.
- Feature usages and rules for the absence type automatically upload with default values based on the absence pattern that you enter.
- When you enter special conditions for a qualification plan, you must enter the corresponding condition codes separated by commas.

Absence Categories Spreadsheet

You can associate a maximum of five absence types with an absence category.

Updating Absence Data Using HCM Spreadsheet Data Loader: Procedure

You can use the Data Exchange work area to create absence data using spreadsheets and upload to Oracle Fusion Absence Management.

Summary of Tasks

The process for updating the database tables using spreadsheets is:

1. Download the absence spreadsheet.
2. Enter data into the spreadsheet and upload to the database.
3. Review the results and reprocess.
4. View the imported absence data in the user interface.

Prerequisites

Before you complete this task, you must install the Oracle ADF Desktop Integration Runtime Add-In for Excel.

Downloading the Spreadsheet

To update absence data using spreadsheets, you need to first select and download the relevant spreadsheet.

1. In the Data Exchange work area, click **Initiate Spreadsheet Load** in the Tasks pane.
2. On the Initiate Spreadsheet Load page, select one of the following absence business objects to upload:
    - Create Absence Record
    - Create Absence Reasons
    - Create Absence Certifications
    - Create Absence Plans
    - Create Absence Types
    - Create Absence Categories
3. Click **Create Spreadsheet** to download and save the spreadsheet that you selected.

Entering and Uploading the Absence Data

After downloading the absence spreadsheet:

1. Open the spreadsheet.
2. Ensure that you provide any required values in the rows and follow instructions in the spreadsheet for creating rows.
3. Click **Upload**.
4. In the dialog box that appears, click **OK**.
5. When uploading completes, identify any spreadsheet rows with the status **Insert failed**, which indicates the import failed.
6. For any row that failed, double-click the status value to display a description of the error.
7. Correct any import errors and click **Upload** again to import the remaining rows to the same batch.

Reviewing the Results and Reprocessing

To view any data issues:

1. In the Data Exchange work area, click **Load Spreadsheet Data** in the Tasks pane.
2. Click **Search** to check the results of the uploaded data. The results appear with the status whether the process completed successfully or not.
3. If there are data issues, click **Refresh** in the original spreadsheet to correct any load errors.
4. Click **Upload** to import the corrected rows.

Viewing the Absence Data

To view the absence data uploaded using the spreadsheet:

1. In the Absence Administration work area, select the absence definition task for which you uploaded absence data. For example, if you uploaded absence reasons, open the Manage Absence Reasons page.
2. Click **Search**.
3. Select the particular row to view data for the absence reasons that you created and uploaded.

Setting Up the Desktop Integration for Excel: Procedure

Desktop integrated Excel workbooks let you create or edit records that you can upload to the application. To use these workbooks, you must install a desktop client and set up Microsoft Excel.

Prerequisites

Perform these prerequisites before you install the client.

- Make sure that you have:
  - Microsoft Excel 2007, 2010, 2013, or 2016 (32-bit recommended)
  - Microsoft Windows 7, 8.1, or 10
- If you're reinstalling the client and currently have a version older than 11.1.1.7.3 (4.0.0), then uninstall that Oracle ADF Desktop Integration Add-In for Excel client the same way you uninstall any program on your computer.

Tip: You can find the version in the control panel where you uninstall programs, or in the About dialog box in Excel.

- Optionally install the following from the Microsoft web site.
  - Microsoft .NET Framework 4.5.2
  - Microsoft Visual Studio 2010 Tools for Office Runtime (VSTO Runtime)

  The desktop client installer does check if you have these already, and would download and install them if needed. But, you can manually install them first, especially if you run into issues installing them as part of installing the desktop client.

Installing the Desktop Client

Install the Oracle ADF 11g Desktop Integration Add-In for Excel, which is a desktop client that lets you use the integrated workbooks that you download from the application.

1. Make sure you are signed in to your computer with your account. For example, you can't have someone else sign in as an administrator and make the installation available for everyone using your computer.
2. In the application, look for the client installer under **Navigator - Tools**. If it's not there, then ask your help desk where you can find the installer.
3. Run the installer (`adfdi-excel-addin-installer.exe`) as you would any program that you install on your computer.

Setting Up Microsoft Excel

Integrated workbooks can have buttons within the worksheet, which you click to perform an action, for example to upload the worksheet. If you use any workbook with such buttons, then perform the following steps in Microsoft Excel only once, even if you reinstall the desktop client.

1. Click the **Microsoft Office** button, and click the **Excel Options** button.
2. In the Excel Options dialog box, select the Trust Center tab, and click **Trust Center Settings**.
3. In the Trust Center dialog box, select the Macro Settings tab, and select the **Trust access to the VBA project object model** check box.

Note: The exact steps can vary depending on your version of Microsoft Excel.

Using Desktop Integrated Excel Workbooks: Points to Consider

Where available, you can download a desktop-integrated Microsoft Excel workbook and use it to create or edit records. Your edits in the workbook don't affect the application until you upload the records back into the application. As you work, keep in mind the following points.

What You Must Not Do

To ensure that you successfully upload to the application, don't:

- Rename text from the integrated workbook, for example the worksheet or tab names.
- Add columns.
- Delete any part of the template, for example columns.
- Hide required columns and status columns or headers.

Caution: Avoid using the Windows Task Manager and clicking **End Task** to close Excel. Doing so might disable the add-in.

Conventions

Some column headers in the integrated workbook might include **[..]**. This means that you can double-click or right-click within any cell in the column to open a dialog box, which lets you select a value to insert into that cell.

Statuses

Depending on the workbook you're using, you can find statuses within the worksheets or in the Status Viewer. Within the worksheets, you might find statuses for:

- **Worksheet:** The status in the header area applies to the entire worksheet, or tab, within the integrated workbook.
- **Table:** The status applies to only the corresponding table.
- **Row:** The status applies to the state of the row within the workbook, not to the record itself. For example, if an expense item row has an error status, that error applies to the upload or validation of the data in that row. It's not a status for where the expense item is at in its life cycle..

You can usually double-click on all three types of statuses to see details on any errors.

To use the Status Viewer:

1. Open the tab for your task in the Ribbon, if available. For example, if you downloaded a workbook to create expense items, the tab is called Create Expense Items.
2. Click **Status Viewer**.
3. In the worksheet, click any table row to see the status of the row, including messages for any errors. The Status Viewer always shows the status of the entire worksheet.

Searches

Some integrated workbooks have searches. To search within the workbook, sign in to the application first if you haven't already. In the Ribbon tab for your task, if available, click **Login**.

Refreshes After Upload

If your changes aren't reflected after an upload, refresh the table in the application by:

- Using the refresh option for the table
- Applying a filter or search on the table

Related Topics

- Using Tables: Explained

Troubleshooting the Desktop Integration for Excel: Procedure

The application is integrated with Microsoft Excel so that, where available, you can work with records in a desktop integrated workbook. You might run into issues with the integration, for example, if you can't open the workbook that you downloaded or the workbook doesn't look right.

Verifying the Version of Your Desktop Client

First, check the version of your Oracle ADF 11g Desktop Integration Add-In for Excel client.

1. Find Oracle ADF 11g Desktop Integration Add-In for Excel in the control panel where you uninstall programs on your computer, and see the **Version** column. Or, open the About dialog box in Excel, for example by doing one of the following:
    - Without opening a desktop integrated workbook, click the Microsoft Office button in Excel, select **ADF Desktop Integration**, and then select **About Oracle ADF 11g Desktop Integration**.
    - With a desktop integrated workbook open, click the Ribbon tab named after the task you're doing in the workbook, if available. Click **About**, and open the Versions tab, and see the version for the ADF Desktop Integration component.
2. Ask your help desk if you need to reinstall the client, due to the version you're on.

Using the Client Health Check Tool

Use the health check tool to find out what integration issues you might have and how to resolve them. Ask your help desk if you are unable to find or use the tool.

1. Open a desktop-integrated workbook, and note down the URL in the Connect dialog box.
2. In a web browser, open the URL and click the **Run client health check tool** link to download the tool.
3. Run `ClientHealthCheck.exe` as you would other programs on your computer, and review the result for each checked item.
4. Select any item that has a problem, and read the help text.
5. Fix some of the problems by clicking the **Fix Problems** button. Otherwise, follow the instructions in the help text.
6. If you need more assistance, click the **Save Report As** button to prepare information for your help desk.
7. Review the report and remove any sensitive information.
8. Contact your help desk and provide your report.

Reenabling the Add-In

In some cases, the desktop integration add-in for Excel can become disabled. If you have the right version installed, but the add-in isn't working and you're not using the health check tool, then try the following:

1. Click the **Microsoft Office** button, and click the **Excel Options** button.

2. Select the Add-Ins tab, and check which list the **Oracle ADF 11g Desktop Integration Add-in for Excel** is in.
3. If **Oracle ADF 11g Desktop Integration Add-in for Excel** is in the **Disabled Application Add-ins** list:

    a. Select **Disabled Items** in the **Manage** field and click **Go**.
    b. In the Disabled Items dialog box, select **Oracle ADF Desktop Integration Add-In for Excel** and click **Enable**.
    c. Back in the Excel Options dialog box, select **COM Add-ins** in the **Manage** field and click **Go**.
    d. In the COM Add-Ins dialog box, select **Oracle ADF 11g Desktop Integration Add-in for Excel**.
4. If **Oracle ADF 11g Desktop Integration Add-in for Excel** is in the **Inactive Application Add-ins** list, then perform only steps 3.3 and 3.4.
5. If **Oracle ADF 11g Desktop Integration Add-in for Excel** is in the **Active Application Add-ins** list, then contact your help desk.

Note: The exact steps can vary depending on your version of Microsoft Excel.

FAQ

What's the difference between export to Excel and desktop integration for Excel?

Use the **Export to Excel** button or menu option to download data from a table to view or analyze. You get a Microsoft Excel file, of any type that Excel supports, with records from the table.

Use the desktop integration for Excel to create or edit records in an Excel workbook and upload the records back into the application. It's helpful for mass updates or working offline. In most cases, you download the desktop integrated workbook from a link in a panel tab, the regional area, or a table.

9 HCM Extracts for Absence Data

Extracting Absence Data Using HCM Extracts: Points to Consider

Extract past and future absences and open-ended absences using the Manage Extract Definitions task in the Data Exchange work area. You can extract absence data based on the effective date or start date. The effective date might not always be the right option because you can make adjustments to existing and past absences.

Consider these aspects before you create an extract definition for absence data:

- Extract type
- Data groups

Extract Type

When you create an extract definition for absence data ensure that you:

- Select **HR Archive** from the Extract Type list.
- Select **Yes** in the Display column for Start Date in the Parameters section. The Effective Date is set to **Yes** by default.

Data Groups

The absence data group available is ABS_EXT_ABSENCE_ENTRY_UE. You can select it as the root data group. If you want person information such as first name and last name to appear, then you need to create a PER_EXT_SEC_PERSON_UE (Person) data group. The Person data group doesn't need to be the root data group.

Defining an Extract: Worked Example

This example demonstrates the steps required to create an extract definition using the Desktop interface. You can access the Desktop interface by clicking the Switch Layout button on the Manage HCM Extract Definitions page. Before you create an extract definition, you should understand the following details:

- Information that you want to extract
- Structure in which the data must be extracted
- How you want to deliver this data (including file format, delivery mechanism, and frequency information)

FAST bank is a global organization with subsidiaries all over the world. As part of an external business reporting requirement, FAST bank is required to extract the department and employee details (grouped by department) across the entire company. This information must be sent to a third party in an XML file and to HR Managers in a PDF file using e-mail. The following table summarizes the key decisions in this scenario:

Decisions to Consider	In This Example
How many extracts do I create to produce this type of report?	You create one extract definition to define a headcount report.
How many data groups do I create?	There are 2 functional groups of information, therefore you create two data groups, one for department and one for employees.
How many records do I create?	You decide the number of records based on the subgroup of attributes within a data group. In this example, you create two records for the department data group: • Department Details • Department Summary You create one record for the employees data group: Employee Details.
How many attributes do I create?	You decide the number of attributes based on the specific information required for that report. Create the following attributes for the Department Details record: • Department Name • Department Location For the Department Summary record, create the following attributes: • Record Code • Report Date • Employee Count For the Employees Details record, create the following attributes: • Full Name • Gender • Date of Birth • Salary • Bonus • Tax Rate
Do I create any fast formulas?	You can use fast formulas at the following levels: • Extract Criteria level to determine certain conditions. • Extract Rule level to derive attribute values. • Extract Advanced Condition level to specify complex conditions. • Extract Record level to automatically generate formulas when you use the Generate Formula option.

Creating an Extract Definition

1. On the Manage HCM Extract Definitions page click on the Create icon.
2. Use the Switch Layout button to open the extract in the Desktop interface.
3. Enter 01-Jan-2000 as the Session Effective Date.

The session effective date is an effective start date that applies to all date-effective interactions in the current session.

4. Enter FAST Bank Extract as the name and select HR Archive as the type. The application automatically creates the tag name based on the extract name and uses this name to generate the XML output file.
5. Click Save and the application saves the extract definition and automatically generates the parameters based on the type of extract. The parameters control the output of an extract. In this example, the application creates the following parameters:
    - Effective Date
    - Legislative Data Group
    - Parameter Group
    - Report Category
    - Request ID
    - Start Date

Creating Extract Data Groups

1. Select the Extract Data Group link from the navigation tree to open the Extract Data Groups region.
2. Click on Create to define a new data group. A data group represents data that belongs to one or more logical data entities.
3. Complete the general fields, as shown in this table:

Field Name	Entry
Name	Departments
User Entity	PER_ EXT_ SEC_ ORGANIZATION_ UE
Root Data Group	Yes (By selecting this option you select this data group as the starting point for the extract execution.)

4. Select Save and Create Another to create a data group for Employees.
5. Complete the general fields, as shown in this table:

Field Name	Entry
Name	Employees
User Entity	PER_ EXT_ SEC_ ASSIGNMENT_UE
Root Data Group	No

Creating Extract Data Group Connections

1. Select Extract Data Group in the navigation tree to display the data groups in a table.
2. Select the Employees Data Group and define the data group connection details.
3. Complete the general fields, as shown in this table:

Field Name	Entry
Parent Data Group	Departments
Parent Data Group Database Item	PER_ EXT_ ORG_ ORGANIZATION_ ID
Data Group Database Item	PER_ EXT_ ASG_ORG_ID

4. Define the data group criteria for each data group.

Creating Extract Records

1. Select the Departments Data Group from the navigation tree and select the Create icon in the Extract Records region. Extract records represent a physical collection of all required fields. If a data group has 3 records, then you can specify the sequence in which the application processes the records using the sequence field. You can also select the Next Data Group to identify which data group the application processes next.
2. Create two records for the Departments Data Group.
3. Complete the general fields, as shown in this table:

Field	Department Summary	Department Details
Name	Department Summary	Department Details
Effective Start Date	1/1/00	1/1/00
Sequence	20	10
Type	Trailer Record	Header Record
Process Type	Fast Formula	Fast Formula
Next Data Group	NA	Employees

4. Save the records, then select the Employees Data Group and select the Create icon in the Extract Records region.
5. Create one record for the Employees Data Group.
6. Complete the general fields, as shown in this table:

Field Name	Entry
Name	Employee Details
Effective Start Date	1/1/00
Sequence	10
Type	Detail Record
Process Type	Fast Formula

Creating Attributes

1. Select the Departments Data Group from the navigation tree and select the Department Details record.

   An extract attribute is an individual field of a record.
2. Create the following extract attributes for the Department Details record and select Save.
3. Complete the general fields, as shown in this table:

Field Name	Attribute Entry	Attribute Entry
Name	Department Name	Department Location
Type	Database item group	Database item group
Database Item Group	Organization Name	Organization Location Country

4. Save the record, then select the Department Summary record.
5. Select the Create icon in the Extract Attributes region.
6. Create the following extract attributes for the Department Summary record and select Save.
7. Complete the general fields, as shown in this table:

Field Name	Attribute Entry	Attribute Entry	Attribute Entry
Name	Record Code	Report Date	Employee Count
Data Type	Text	Date	Number
Type	String	Parameter Element	Summary Element
String Value	999	NA	NA
Parameter	Effective Date	NA	NA

Field Name	Attribute Entry	Attribute Entry	Attribute Entry
Aggregate Function	NA	NA	Count
Aggregate Record Name	NA	NA	Employees Employee Details

8. Select the Employees Data Group from the navigation tree and select the Employee Details record.
9. Create the following extract attributes for the Employee Details record and select Save.
10. Complete the general fields, as shown in this table:

Field Name	Attribute Entry	Attribute Entry	Attribute Entry
Name	Full Name	Gender	Date of Birth
Start Date	1/1/00	1/1/00	1/1/00
Data Type	Text	Text	Date
Type	Database Item Group	Decoded database item group	Database item group
Database Item Group	Person Full Name	Person Gender	Person Date of Birth

Field Name	Attribute Entry	Attribute Entry	Attribute Entry
Name	Salary	Bonus	Tax rate
Start Date	1/1/00	1/1/00	1/1/00
Data Type	Number	Number	Text
Type	Database item group	Record Calculation	Rule
Database Item Group	Assignment Salary Amount	NA	NA
Calculation Expression	NA	Salary * 0.5	NA
Rule	NA	NA	FAST Bank Tax Rule

Defining the Delivery Options

1. Navigate to the Extract Execution Tree to validate the extract definition setup.
2. Select Export XSD to download the XML Schema Definition (.XSD) file for this extract setup. This exported file contains the structure of the extract definition: the data groups, records, and attributes.
3. Select the Extract Delivery Options region to define the formatting and layout options for the extract definition.

4. Complete the general fields, as shown in this table:

Field	Value	Value
Start Date	1/1/00	1/1/00
End Date	12/31/12	12/31/12
BI Publisher Template	ReportLayout	EFTLayout
Output Type	PDF	EFT
Delivery Type	E-mail	FTP
Delivery Option Name	E-mail to HR	FTP to 3rd Party
Output Name	HeadcountReport	EFTReport

5. Define further information for each delivery option in the Additional Details region. For example, add the server, username and password for the FTP delivery type.
6. Enter FAST Bank Extract as the reporting category and click Submit.

Submitting an Extract

An extract definition automatically creates an extract process (payroll flow) with the same name as the extract. The extract process enables you to define an execution sequence of multiple tasks, including before and after tasks.

1. Select the Submit Extracts task and select the FAST Bank Extract process.
2. Select Next.
3. Enter FAST Bank Extract - Jan 2012 as the Payroll Flow (extract process).
4. Enter 1/1/15 as the End Date.
5. Select Next. You can specify interaction details if the task is dependent on other tasks with different extract processes. For example, this task must wait because another task is running.
6. Select Next and review the extract. You can schedule the extract, or run it immediately.
7. Select Submit.
8. Select OK and View Checklist to view the status of the process.
9. Select the View Extract Results task to review the results of the extract run. Search for the FAST Bank Extract process.
10. Select Go to Task for FAST Bank Extract - Jan 2012, click the eyeglasses, and view the report output by selecting the report name.

Related Topics

- Extract Components: How They Work Together
- Defining an Extract Using the Simplified Interface: Worked Example
- How do I create a BI Publisher template for HCM extract?

- What's an extract data group connection?
- HCM Extracts Delivery Options: Explained

10 Rate Definitions for Absence Payments

Rate Definitions for Absence Payments: Explained

Use a rate definition to determine the rate of a single unit of absence for payment during an absence period. However, you calculate and resolve the rates only in Oracle Fusion Global Payroll or a third-party payroll application.

This topic covers the following aspects:

- Using rate definitions with absence plans
- Types of absence payments that support rate definitions

Using Rate Definitions with Absence Plans

To associate a rate definition with an absence plan:

1. Create the rate definition using the Manage Rate Definitions task in the Absence Administration work area.
2. Associate the rate definition with the absence plan on the Entries and Balances tab of the Manage Absence Plans task.

Example: If you want to calculate payments of each time unit when you disburse an accrual balance, you create a rate definition using the Manage Rate Definitions task. Then, when you create an absence plan, you select the rate definition that you created from the Disbursement Rate Rule list on the Entries and Balances tab.

Types of Absence Payments that Support Rate Definitions

The following table describes the types of absence payments for which you can associate a rate definition.

Rates	Description
Absence Payment Rate Rule	Calculates payment during an accrual and qualification absence period. For a qualification absence plan, you can select this rate definition to calculate payment for a qualification absence period. When you create a qualification plan, remember that you define qualification bands to specify the percentage of payment during an absence period. Example: You want to award the worker 75% pay up to the first 90 days of the absence. You use a rate definition to define the calculation method to translate that percentage into an actual payment value.
Final Balance Payment Rate Rule	Calculates payment of accruals when plan participation ends. Example: If the worker is terminated or loses eligibility for the absence plan, you might want to use a rate definition to calculate the final accrual balance. Create a rate definition that considers the worker's salary details and calculates the payment value for each unit of accrued time.
Partial Disbursement Rate Rule	Calculates payment when paying out part of an accrual balance. Example: If the worker is terminated or loses eligibility for the absence plan, you might want to disburse the remainder of the accrual balance as cash. Create a rate definition that considers the worker's salary details and calculates the payment value for each unit of accrued time.

Rates	Description
Liability Booking Rate Rule	Calculates the cost of a worker's accrual balance to determine employer liability. Example: If the is terminated or loses eligibility for the absence plan, you might want to determine employer liability for worker time accruals for the rest of the accrual term.

Related Topics

- Creating a Vacation Absence Accrual Plan: Worked Example

Rate Definitions: Explained

You can create rate definitions to calculate compensation rates and other rates, such as accrual rates, using payroll balances, element entry values, or values defined by criteria. If the rate is based on more than one balance or element entry, or if it references other rate definitions, you can specify multiple rate contributors. Use one of these work areas to access the Manage Rate Definitions task: Setup and Administration, Payroll Calculation, or Absence Administration.

Categories

When you create a new rate, you must select a category.

Each category is described in the following table.

Category	Description
Derived Rate	Retrieves values from one or more payroll balances or other rate definitions, including rates that retrieve element entry values. Use this option to create a rate that retrieves a value from one or more rate contributors.
Element	Retrieves a value from or posts to an element input value. The element input value must have a special purpose of either Primary Input Value or Factor, as follows: • Select the Primary Input Value special purpose for an amount value, such as a salary figure. • Select the Factor special purpose for a factor value, such as a car allowance that you calculate as 3 per cent of average earnings (factor = 0.03).
Value by Criteria	Retrieves values from a single value by criteria definition. A value by criteria definition specifies one or more evaluation conditions that determine a particular value or rate. You can specify the conditions as a tree structure to define the evaluation sequence.

Related Topics

- Rate Contributors for Derived Rates: Points to Consider
- Configuring Elements to Use Rate Definitions: Procedure
- Values Defined by Criteria: Explained
- Manage Values Defined by Criteria: Examples

Creating Rate Definitions: Points to Consider

To create rate definitions you should know how to use the fields in the Returned Rate Details, Override and Defaulting Rules, and Contributor Rules sections to get your desired rate. For rates based on a single element entry value, you can also apply override and defaulting rules.

This table describes the fields that appear in the Basic Details section on the Create Rate Definition page for the Derived Rate, Element, and Value by Criteria category types.

Field	Category	Description
Storage Type	Element	If you select the Element category to define a rate, you must select a storage type of Amount or Percentage. For example, you can create a rate definition using the Salary element. If the salary is held as a monetary value, select Amount. If the salary is a factor of another value, such as a balance, select Percentage. **Note:** This field is hidden for all rate definition categories other than Element.
Element Name	Element Derived Rate	For the Element category this field isn't enabled until you select the storage type. Selecting an element automatically fills in the Name and Short Name fields with the element name. If you select the Element category to define a rate, you must select an element name. This is required if you are creating a primary rate. This is a rate which retrieves a value from a single element such as salary. For the Derived Rate category, the Element Name is enabled when you access the page.
Employment Level	Derived Rate Value by Criteria	Select either Payroll Relationship, Term or Assignment. This field is mandatory for all derived rates and value by criteria rate definitions. It controls which employment ID the rates process uses when calling a rate. If the employee has multiple assignments, the rates process uses the assignment ID to identify the correct assignment record for the employee. If the contributor value is held at a different level to the employment level defined on the rate, the rates process uses the employment ID to locate the correct record.

Field	Category	Description
Status	Element Derived Rate Value by Criteria	You can set the status of a rate to active or inactive. An inactive rate can't be assigned to an employee. Employees that are allocated a rate while it was active aren't impacted by a change in status to inactive.
Base Rate	Element	Select this check box if the rate represents a base rate that another rate uses in its calculation. For example, you might have day shift employees and night shift employees, with different base pay rates. If each set of employees receives an allowance that's a percentage of the base rate, you only need to define one allowance rate that's calculated based on the two rates that have the Base Rate check box selected.
Overall Salary	Element Derived Rate	If you're defining rates for use on the Salary page, you must use the derived rate category and define an Overall Salary. To do this you must associate a salary element to the rate. It's recommended that you define an Overall Salary Information element for this purpose.
Reporting Required	Element Derived Rate Value by Criteria	Select this check box to indicate if the calculated rate value should be stored on the rate table for reporting purposes. If you're defining rates for use on the Salary page, you must select this option. Rate definitions with this check box selected are included when the Generate HCM Rates batch process is run. Use this feature to report on primary rates, not derived rates. It's also used for HCM extracts to send data to third parties.
Value by Criteria Name	Value by Criteria	If you select the Value by Criteria category to define a rate, you must select a Value by Criteria name. A value by criteria definition specifies one or more evaluation conditions that determine a particular value or rate.

Returned Rate Details

Use this section of the page to specify the periodicity of the returned rate, factor rules, currency, decimal display, rounding rules, and minimum and maximum rules. If the process returns a rate that's outside the minimum and maximum range, you can set up an action that enforces the rule, displays a warning, or forces the user to fix the error. Additionally, you can select the Return FTE Rate check box to instruct the rate definition process to return a part-time value by applying an employee's FTE to the rate value.

Periodicities

You must specify a periodicity, such as hourly or weekly, for the returned rate and each rate contributor. When you use the rate in a formula, you can, however, override the default periodicity.

The rate calculation converts each contributor to the periodicity specified on the rate contributor. It then adds or subtracts the rate contributors even if the periodicities are different (in most cases they will be the same). Once the rate contributors are summed, the rate calculation then converts them into the return periodicity and currency.

For example, for a rate with a periodicity of weekly using the annualization conversion formula, the rate calculation does the following:

1. Calculates an annual figure from the value and periodicity of each contributing earning and deduction.
2. Converts the annual figure into a weekly value.

By default, rates are converted using the following values:

- 52 weeks in a year
- 12 months in a year
- 260 working days in a year

To specify different conversion rates, you can define your own formula using the Rate Converter formula type and select it in the Periodicity Conversion Formula field.

Factor Rules

You can apply a factor or multiplier to a calculated rate, or to an individual rate contributor. To apply a factor rule:

- Select Value as the factor rule
- In the Factor field enter the number by which you want to multiply the rate
- Add the contributor

You can apply a factor rule to the rate definition, rate contributors, or both. For example, you can define rate contributors to calculate hourly values based on salary and bonus. You can then apply a factor of 1.0 or 100 percent to the salary balance contributor and a factor of 0.5 or 50 percent to the bonus balance contributor. The factor rule is applied to the rate before the periodicity conversion is applied.

Minimum and Maximum Values

You can define minimum and maximum values for the returned rate, and for individual rate contributors. If the calculation returns a rate that's outside the minimum or maximum range, you can set up an action if the value is out of the minimum or maximum range.

Use the Limit Violation Action field to display an error, warning, or enforce the system to use minimum or maximum value that you enter. For example, you can enter 500 as the minimum value and then select Enforce Rules. If the returned value comes back as 400, the system uses 500 as the value.

The following table explains the options for the minimum and maximum rate values

Value	Comments
Null	No minimum or maximum value

Value	Comments
A specified value	Example: 2000
Based on another rate	Uses the calculated value of the rate definition that you select. **Caution:** Be careful that you don't create a loop. For example, Rate A has minimum value that is based on Rate B, which has a minimum value based on Rate A. This situation would result in a runtime error.
Value by Criteria	Minimum or maximum value based on a value by criteria definition.

Override and Defaulting Rules

This tab only displays if you select Element as the category when you create your rate definition. On this tab, you can set up override rules for the element associated with your rate definition. If you select the Override Allowed check box, you can enter rate values on the Salary page.

> **Note:** You can't define override and defaulting rules if you select the Values by Criteria category to define a rate,

You can select a formula to validate any rate that is returned and also use formulas to create default values.

For example you could use the HCM Rates Default Value formula type to define the number of workdays in a year for your organization.

```
workday = 250
periodicity = YEAR
currency = USD
return workday, periodicity, currency
```

In addition, you can use a value by criteria definition as the default type. In this example, the process uses the value for the first record created and then carries that value forward in subsequent records, unless it's manually overridden. The rate created using the value by criteria method is reevaluated by the rate engine for each subsequent record and could therefore change. For example you could use a value by criteria definition to enable a default value of 10 percent for bonuses that are targeted to all eligible employees.

Contributor Rules

This tab enables you to specify the periodicity for the contributor total. You can also decide to process contributor totals as full-time equivalency amounts by selecting Yes in the Process Contributor Total as FTE Amount field. The final rate value is converted from this status to the Return Rate FTE status.

> **Note:** This tab is not available for rate definitions using the Element and Value by Criteria categories. In addition, you can't define contributor rules if you select the Value by Criteria category to define a rate.

Information

This tab enables you to enter text that instructs or explains the purpose of the rate, how the rate is calculated, or provides further details for the rate. Entering information in this section is optional. This tab is not available for rate definitions using the Value by Criteria categories.

Related Topics

- Rate Contributors for Derived Rates: Points to Consider
- Configuring Elements to Use Rate Definitions: Procedure
- How does periodicity conversion work when there are multiple contributors with different periodicities?

Creating Rate Definitions for Leave: Worked Example

This example shows how to calculate an employee's absence rate as of a particular date. The rate includes a combination of average salary and car allowance. In this example, the employee has an annual year-to-date salary of 26,000 GBP. The employee also receives an annual car allowance payment of 2,000 GBP. The absence rate is 26,000 + 2,000 = 28,000 GBP. This rate is then converted into a daily rate for the purpose of providing a daily absence rate.

The following table summarizes the key information that you'll use in the examples:

Decisions to Consider	In This Example
What elements do I need to create before I define the rate?	• Salary (assignment level) - This element contains the salary value to be retrieved by the rate definition. You must create it using the Flat Amount calculation rule. • Car Allowance (assignment level) - This element contains the car allowance value to be retrieved by the rate definition. You must create it using the Flat Amount calculation rule. • Absence - Use the Absence template to create the element. Enter Sickness as the classification and Absence as the category.
Which balances hold the contributing values?	• Salary is fed by the Salary element. • Car Allowance is fed by the Car Allowance element.
Should I process contributor totals as full-time equivalent amounts?	Yes

Creating the Rate Definition

1. In the Payroll Calculation or Setup and Maintenance work area, select the **Manage Rate Definitions** task.
2. In the Search Results section, click **Create**.
3. Complete the fields as shown in this table.

Field	Value
Category	Derived Rate

Field	Value
Effective Start Date	Select a date that is after the creation date of the objects that you are referencing
Legislative Data Group	Select your legislative data group

4. Click **OK**.
5. In the Basic Details section on the Create Rate Definition page, complete the fields as shown in this table.

Field	Value
Name	Absence Rate - Salary and Car Allowance
Short Name	ABS RATE - SAL/CAR ALLOW

6. In the Returned Rate Details section, select **Daily** as the value for the Periodicity field.
7. Go to the Contributor Rules tab and then select **Yes** as the value for the Process Contributor Total as FTE Amount field.

   The balances referenced need to be populated using payroll runs for the periods covered by the balance dimension or the rate definition will not generate a meaningful value.

Creating Rate Contributors

1. In the Rate Contributors section, click **Create**.
2. Select **Balance** as the Contributor Type and then click **OK**.
3. On the Create Rate Contributors page, complete the fields as shown in this table.

Field	Value
Add or Subtract	Add
Balance Name	Regular Salary
Balance Dimension	Assignment Period to Date
Periodicity	Daily

4. Click **Save and Continue**.
5. Click **Create**.
6. Select **Balance** as the Contributor Type and then click **OK**.
7. On the Create Rate Contributor page, complete the fields as shown in this table.

Field	Value
Add or Subtract	Add

Field	Value
Balance Name	Car Allowance
Balance Dimension	Assignment Period to Date
Periodicity	Daily

8. Click **Save and Continue**.
9. Click **Submit**.
10. Assign an Absence element entry to the employee's assignment.

> **Note:** You will then need to pass the absence entry through to payroll using the absence interface.

Related Topics

- Rate Contributors for Derived Rates: Points to Consider
- Generating HCM Rates: Procedure
- Integrating Absence Management with Global Payroll: Procedure

11 Eligibility Profiles for Absence Plans

Eligibility Profiles for Absence Plans: Explained

Use an eligibility profile to determine whether a person qualifies for enrollment in an absence plan. Eligibility profiles that you associate with absence plans determine:

- Who can enroll in absence plans
- Who can schedule absences

Using Eligibility Profiles with Absence Plans

To associate an eligibility profile with an absence plan:

1. Create the eligibility profile using the Manage Eligibility Profiles task in the Absence Administration work area.
2. Associate the eligibility profile with the absence plan using the Manage Absence Plans task.

Example: To enable only female employees to record maternity leave, create an eligibility profile using the Manage Eligibility Profiles task. Then, when you create a maternity qualification absence plan, select the eligibility profile you created from the Eligibility section on the Participation tab.

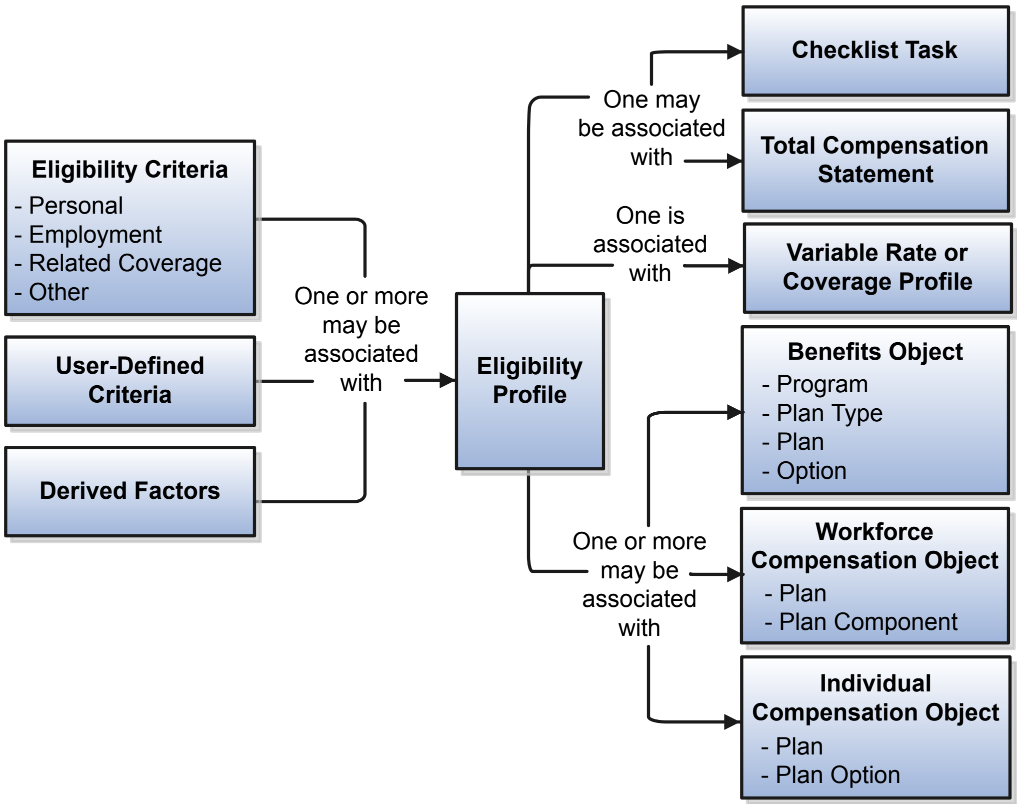
Related Topics

- Creating a Maternity Absence Qualification Plan: Worked Example

Eligibility Components: How They Work Together

You add eligibility criteria to an eligibility profile, and then associate the profile with an object that restricts eligibility.

The following figure shows the relationships between eligibility components.



Eligibility Criteria

You can add different types of eligibility criteria to an eligibility profile. For many common criteria, such as gender or employment status, you can select from a list of predefined criteria values. However, you must create user-defined criteria and derived factors before you can add them to an eligibility profile.

Eligibility Profile

When you add an eligibility criterion to a profile, you define how to use it to determine eligibility. For example, when you add gender as a criterion, you must specify a gender value (male or female) and whether to include or exclude persons who match that value.

Associating the Profile with Objects

This table describes associating eligibility profiles with different kinds of objects and whether you can attach more than one profile.

More than One Profile?	Associated Objects	Purpose
No	Variable rate or variable coverage profile	Establish the criteria required to qualify for that rate or coverage

More than One Profile?	Associated Objects	Purpose
No	Checklist task	Control whether that task appears in an allocated checklist
No	Total compensation statement	Apply additional eligibility criteria after statement generation population parameters
Yes	Benefits object	Establish the eligibility criteria for specific programs, plans, and options
Yes	Compensation object	Establish the eligibility for specific plans and options
Yes	Performance documents	Establish the eligibility for performance documents
Yes	Goal plans or goal mass assignments	Establish eligibility for the goal
One or more	Absence plan	Determine the workers who are eligible to record an absence that belongs to that plan

Related Topics

- User-Defined Criteria: Explained

Derived Factors: Explained

Derived factors define how to calculate certain eligibility criteria that change over time, such as a person's age or length of service. You add derived factors to eligibility profiles and then associate the profiles with objects that restrict eligibility.

Derived Factor Types

Using the **Manage Derived Factors** task, you can create six different types of derived factors:

- Age
- Length of service
- A combination of age and length of service
- Compensation
- Hours worked
- Full-time equivalent

Determination Rules and Other Settings

For each factor that you create, you specify one or more rules about how eligibility is determined. The following table provides example settings for two factors.

Factor	Example Settings
Age derived	Select a determination rule to specify the day on which to evaluate the person's calculated age for eligibility. Example: If the determination rule is set to the first of the year, then the person's age as of the first of the year is used to determine eligibility.
Full-time equivalent	Specify the minimum and maximum full-time equivalent percentage and whether to use the primary assignment or the sum of all assignments when evaluating eligibility. Example: If 90 to 100 percent is the percentage range for the sum of all assignments, then a person who works 50 percent full-time on two different assignments is considered eligible.

For derived factors pertaining to time and monetary amounts, you can also set the following rules:

- Unit of measure
- Rounding rule
- Minimum and maximum time or amount

Derived Factors: Examples

The following scenarios illustrate how to define different types of derived factors:

Age

Benefits administrators frequently use age factors to determine:

- Dependent eligibility
- Life insurance rates

Age factors typically define a range of ages, referred to as age bands, and rules for evaluating the person's age. The following table illustrates a set of age bands that could be used to determine eligibility for life insurance rates that vary based on age.

Derived Factor Name	Greater Than or Equal To Age Value	Less Than Age Value
Age Under 25	1	25
Age 25 to 34	25	35
Age 35 to 44	35	45

Derived Factor Name	Greater Than or Equal To Age Value	Less Than Age Value
Age 45 to 54	45	55
Age 55 to 64	55	65
Age 64 or Older	65	75

The determination rule and other settings for each age band are the same:

Field	Value
Determination Rule	First of calendar year
Age to Use	Person's
Units	Year
Rounding	None

Length of Service

A derived factor for length of service defines a range of values and rules for calculating an employee's length of service. The following table shows an example of a set of length-of-service bands. You can use the length-of-service bands to determine eligibility for compensation objects such as bonuses or severance pay.

Derived Factor Name	Greater Than or Equal To Length of Service Value	Less Than Length of Service Value
Service Less Than 1	0	1
Service 1 to 4	1	5
Service 5 to 9	5	10
Service 10 to 14	10	15
Service 15 to 19	15	20
Service 20 to 24	20	25
Service 25 to 29	25	30

Derived Factor Name	Greater Than or Equal To Length of Service Value	Less Than Length of Service Value
Service 30 Plus	30	999

The determination rule and other settings for each length-of-service band are the same:

Field	Value
Period Start Date Rule	Date of hire This sets the beginning of the period being measured.
Determination Rule	End of year This sets the end of the period being measured.
Age to Use	Person's
Units	Year
Rounding	None

Compensation

A derived factor for compensation defines a range of values and rules for calculating an employee's compensation amount. The following table shows an example of a set of compensation bands. You can use the compensation bands to determine eligibility for compensation objects such as bonuses or stock options.

Derived Factor Name	Greater Than or Equal To Compensation Value	Less Than Compensation Value
Less than 20000	0	20,000
Salary 20 to 34000	20,000	35,000
Salary 35 to 49000	35,000	50,000
Salary 50 to 75000	50,000	75,000
Salary 75 to 99000	75,000	100,000
Salary 100 to 200000	100,000	200,000
Salary 200000 Plus	200,000	999,999,999

The determination rule and other settings for each compensation band are the same:

Field	Value
Determination Rule	First of year
Unit of Measure	US Dollar
Source	Stated compensation
Rounding	Rounds to nearest hundred

Range of Scheduled Hours: Example

This example illustrates how to define eligibility criteria based on the number of hours a worker is scheduled to work within a specified period.

Weekly and Monthly Ranges

You want to limit eligibility for a benefits offering to workers who were scheduled to work either of the following ranges. Both ranges are as of the end of the previous quarter:

- Between 30 and 40 hours each week
- Between 130 and 160 hours each month

To do this, add two different ranges on the Range of Scheduled Hours subtab under the Employment tab of the create or edit eligibility profile pages. Set the values for the weekly range as shown in the following table:

Field	Value
Sequence	**1**
Minimum Hours	**30**
Maximum Hours	**40**
Scheduled Enrollment Periods	**Weekly**
Determination Rule	**End of previous quarter**

Set the values for the monthly range as shown in this table:

Field	Value
Sequence	**2**
Minimum Hours	**130**
Maximum Hours	**160**
Scheduled Enrollment Periods	**Monthly**
Determination Rule	**End of previous quarter**

Eligibility Profiles: Explained

Create eligibility profiles to define criteria that determine whether a person qualifies for objects that you associate the profile with. You can associate eligibility profiles with objects in a variety of business processes.

The following are key aspects of working with eligibility profiles:

- Planning and prerequisites
- Specifying the profile type, usage, and assignment usage
- Defining eligibility criteria
- Excluding from eligibility
- Assigning sequence numbers
- Adding multiple criteria
- Viewing the criteria hierarchy

Planning and Prerequisites

Before you create an eligibility profile, consider the following:

- If an eligibility profile uses any of the following to establish eligibility, you must create them before you create the eligibility profile:
  - Derived factors
  - User-defined formulas
  - User-defined criteria
- Consider whether to combine criteria into one profile or create separate profiles depending on:
  - Whether the object for which you're creating eligibility accepts only one eligibility profile or more than one
  - Performance considerations
- Use names that identify the criteria being defined rather than the object with which the profile is associated, because eligibility profiles are reusable.

  Example: Use Age20-25+NonSmoker rather than Supplemental Life-Minimum Rate.

Specifying Profile Type, Usage, and Assignment Usage

This table describes the basic profile attributes that you specify when you create an eligibility profile:

<table>
<tr><th>Setting</th><th>Description</th></tr>
<tr><td>Profile Type</td><td>Use only dependent profiles for Benefits plans or plan types when determining eligibility of participants' spouses, family members, or other individuals who qualify as dependents.

All other profiles are participant profiles.</td></tr>
<tr><td>Usage</td><td>Determines the type of objects the participant profile can be associated with, such as benefits offerings and rates, compensation plans, checklist tasks, goal plans or mass goal assignments, or performance documents.

Selecting Global makes the profile available to multiple business process usages.</td></tr>
<tr><td>Assignment to Use</td><td>Determines the assignment that the eligibility process evaluates for the person
Select Specific assignment when the usage is Compensation or Performance.
Select a value that includes benefit relationship when the usage is Benefits. You select this value to restrict eligibility evaluation to active assignments that are associated with the benefits relationship of the person on a given date. If you select other values, then you might need to include eligibility criteria to exclude inactive assignments.
Select one of the following values for all other usages, such as total compensation statements:
Any assignment - enterprise
Employee assignment only - enterprise
Primary employee assignment only - enterprise</td></tr>
</table>

Defining Eligibility Criteria

Criteria defined in an eligibility profile are divided into categories:

Category	Description
Personal	Includes gender, person type, postal code ranges, and other person-specific criteria.
Employment	Includes assignment status, hourly or salaried, job, grade, and other employment-specific criteria.
Derived factors	Includes age, compensation, length of service, hours worked, full-time equivalent, and a combination of age and length of service.
Other	Other: Includes miscellaneous and user-defined criteria.
Related coverage	Includes criteria based on whether a person is covered by, eligible for, or enrolled in other benefits offerings.

Some criteria, such as gender, provide a fixed set of choices. The choices for other criteria, such as person type, are based on values defined in tables. You can define multiple criteria for a given criteria type.

Excluding from Eligibility

For each eligibility criterion that you add to a profile, you can indicate whether persons who meet the criterion are considered eligible or are excluded from eligibility. For example, an age factor can include persons between 20 and 25 years old or exclude persons over 65.

If you:

- Exclude certain age bands, then all age bands not explicitly excluded are automatically included.
- Include certain age bands, then all age bands not explicitly included are automatically excluded.

Assigning Sequence Numbers

You must assign a sequence number to each criterion. The sequence determines the order in which the criterion is evaluated relative to other criteria of the same type.

Adding Multiple Criteria

If you define multiple values for the same criteria type, such as two postal code ranges, a person must satisfy at least one of the criteria to be considered eligible. For example, a person who resides in either postal range is eligible.

If you include multiple criteria of different types, such as gender and age, a person must meet at least one criterion defined for each criteria type.

Viewing the Criteria Hierarchy

Select the View Hierarchy tab to see a list of all criteria that you have saved for this profile. The list is arranged by criteria type.

Related Topics

- User-Defined Criteria: Explained

Eligibility Profiles: Examples

The following examples show how to use eligibility profiles to determine which workers are eligible for a plan, compensation object, and checklist task.

In each case, you:

1. Create the eligibility profile using the Manage Eligibility Profiles task, which is available in several work areas, including Setup and Maintenance.
2. Associate the eligibility profile with the relevant object, such as a benefit plan.

Savings Plan Eligibility

A savings plan, such as a 401k plan, is restricted to full-time employees under 65 years of age. Create an eligibility profile to associate with your plan.

The following table provides the values for the eligibility profile definition.

Field	Value
Profile Usage	Benefits
Profile Type	Participant

Criteria Type	Name	Values	Select Exclude Check Box
Employment	Assignment Category	Full-Time	No
Derived Factor	Age	Select an age derived factor for the age band of 65 and older	Yes

Bonus Eligibility

You offer a bonus to all employees who received the highest possible performance rating in all rating categories. Create an eligibility profile to associate with your Bonus compensation object.

The following table provides the values for the eligibility profile definition.

Field	Value
Profile Usage	Compensation, or Global
Profile Type	Participant
Assignment to Use	Specific Assignment

The following table provides the values for the eligibility criteria for each rating category.

Criteria Type	Name	Values	Select Exclude Check Box
Employment	Performance Rating	Select the performance template and rating name, and then select the highest rating value	No

Checklist Task Eligibility

A new hire checklist contains tasks that don't apply to employees who work in India. Create an eligibility profile to associate with each checklist task that doesn't apply to workers in India.

The following table provides the values for the eligibility profile definition.

Field	Value
Profile Usage	Checklist
Profile Type	Participant

The following table provides the values for the eligibility criteria.

Criteria Type	Name	Values	Select Exclude Check Box
Employment	Work Location	India	Yes

Related Topics

- How can I restrict benefits enrollment opportunities based on provider location?
- Configuring Grandfathered Benefits Eligibility: Procedure

Combining Eligibility Criteria or Creating Separate Profiles: Points to Consider

You can define multiple criteria in an eligibility profile or create separate profiles for individual criterion. To determine the best approach, consider the following:

- Does the object for which you are defining eligibility allow multiple eligibility profiles?
- What is the best approach in terms of efficiency and performance?
- Are your criteria both inclusive and exclusive?

Allowable Number of Eligibility Profiles

If an object permits only one eligibility profile, you must include all criteria in a single profile.

The following table shows which objects permit only one profile and which permit more.

Only One Profile	One or More Profiles
• Checklist tasks	• Benefits offerings

Only One Profile	One or More Profiles
• Variable rate profiles • Variable coverage profiles • Total compensation statements • Absence types	• Individual and workforce compensation plans • Performance documents • Goal plans or mass goal assignments • Absence plans

Efficiency and Performance in the Benefits Hierarchy

For optimum performance and efficiency, attach profiles at the highest possible level in the benefits object hierarchy and avoid duplicating criteria at lower levels. For example, to be eligible for a plan type, a person must satisfy eligibility profiles defined at the program and plan type in program levels.

The following objects inherit the eligibility criteria associated with the program:

- Plan types in program
- Plans in program
- Plans
- Options in plans that are in programs

However, it's sometimes more efficient to create more than one profile and attach the profiles at various levels in the hierarchy. The following table illustrates applying successively restrictive exclusion criteria at different levels in the hierarchy:

Level	Eligibility Profile Criteria
Program	Exclude employees who do not have an active assignment.
Plan type in program	Exclude employees who do not have a full-time assignment.
Plan	Exclude employees whose primary address is not within a defined service area.

Using Both Inclusive and Exclusive Criteria

Eligibility criteria can be used to include or exclude persons from eligibility. Sequencing of criteria is more complicated when you mix included and excluded criteria in the same profile. For ease of implementation, keep excluded criteria in a separate eligibility profile.

Related Topics

- Configuring Eligibility Criteria at General Vs. Detailed Hierarchy Levels: Example

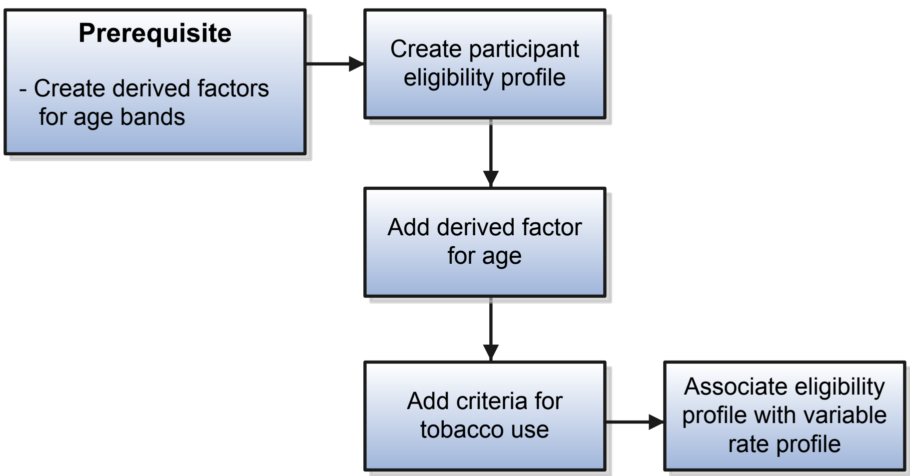
Creating an Eligibility Profile: Worked Example

This example demonstrates how to create a participant eligibility profile used to determine eligibility for variable life insurance rates. Use the Plan Configuration work area to complete these tasks.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In this Example
What is the profile type?	Participant
What type of object is associated with this profile?	Variable rate for benefits offering
What types of eligibility criteria are defined in this profile?	Age derived factor (must have been previously defined) Uses Tobacco criteria
Should persons meeting these criteria be included or excluded from eligibility?	Included

The following figure shows the tasks to complete in this example:



In this example, you create one eligibility profile that defines the requirements for a single variable rate.

- Typically, you create a set of eligibility profiles, one for each variable rate.
- Create a separate profile for each additional rate by repeating the steps in this example, varying the age and tobacco use criteria.

Prerequisites

1. Create an age derived factor for ages less than 30.

Creating the Eligibility Profile

Use default values for fields unless the steps specify other values.

1. In the Tasks panel drawer, click **Manage Eligibility Profiles** to open the Manage Eligibility Profiles page.

2. On the Create menu, select **Create Participant Profile**.
3. In the Eligibility Profile Definition section, complete the fields as shown in this table.

Field	Value
Name	Age Under 30+ Non-Smoking
Profile Usage	Benefits
Status	Active
Assignment to Use	Any assignment - benefit relationship

Adding the Derived Factor for Age

Use default values for fields unless the steps specify other values.

1. In the Eligibility Criteria section, select the **Derived Factors** tab.
2. On the Age tab, click **Create**.
3. Complete the fields as shown in this table.

Field	Value
Sequence	1
Age	Select the derived factor that you previously defined for ages under 30
Exclude	Make sure that it is not selected

Adding the Criteria for Tobacco Use

Use default values for fields unless the steps specify other values.

1. Select the **Personal** tab.
2. On the Uses Tobacco tab, click **Create**.
3. Complete the fields as shown in this table.

Field	Value
Sequence	1
Tobacco Use	None
Exclude	Make sure that it is not selected

Field	Value

4. Click **Save and Close**.

Associating the Eligibility Profile with a Variable Rate Profile

Use default values for fields unless the steps specify other values.

1. In the Tasks panel drawer, click **Manage Benefits Rates** to open the Manage Benefits Rates page.
2. Select the **Variable Rates** tab.
3. Click **Create**.
4. In the **Eligibility Profile** field, select the eligibility profile you just created.
5. Complete other fields as appropriate for the rate.
6. Click **Save and Close**.

Related Topics

- Creating a Variable Rate: Worked Example

FAQs

What happens if I don't select the Required option when I add an eligibility profile to an object?

If you add only one eligibility profile to an object, then the criteria in that profile must be satisfied, even if the **Required** option isn't selected.

If you add multiple eligibility profiles, the following rules apply:

- If all profiles are optional, then at least one of the profiles must be satisfied.
- If all profiles are required, then all of the profiles must be satisfied.
- If some but not all profiles are required, then all required profiles must be satisfied and at least one optional profile must also be satisfied.

What happens if I include multiple criteria in an eligibility profile?

If you define multiple values for the same criteria type, such as two postal code ranges, a person must satisfy at least one of the criteria to be considered eligible. For example, a person who resides in either postal range is eligible.

If you include multiple criteria of different types, such as gender and age, a person must meet at least one criterion defined for each criteria type.

Glossary

absence pattern

Predefined rules related to common usages of absences that you must use as a starting point to create an absence type.

absence plan

A benefit that entitles workers to accrue time for the purpose of taking leave and receiving payments during absence periods.

absence reason

A specific cause of absence that can be selected during absence recording.

absence type

A grouping of absences, such as illness or personal business that is used for reporting, accrual, and compensation calculations.

accrual absence plan

A benefit that entitles workers to accrue time for the purpose of taking leave.

assignment

A set of information, including job, position, pay, compensation, managers, working hours, and work location, that defines a worker's or nonworker's role in a legal employer.

band

A specified range of values. Example: An age band defines a range of ages, such as 25 to 30, used to determine a person's eligibility.

benefits object hierarchy

A structure that enables efficient management of benefits that share similar attributes. The four object types used to structure benefits offerings are programs, plan types, plans, and options.

benefits offering

Any of an organization's nonsalary components of employee benefits packages, such as health, savings, life insurance, recreation, goods, or services.

ceiling step

Highest step within a grade that a worker may progress to.

date-effective object

An object with a change history. Professional users can retrieve the object as of a current, past, or future date.

derived factor

Calculated eligibility criterion that changes over time, such as age or length of service.

effective as-of date

A date used for filtering search results for date-effective objects. For objects that match the search criteria, the search results include the physical record in effect on the specified date.

effective end date

For a date-effective object, the end date of a physical record in the object's history. A physical record is available to transactions between its effective start and end dates.

effective start date

For a date-effective object, the start date of a physical record in the object's history. A physical record is available to transactions between its effective start and end dates.

eligibility profile

A user-defined set of criteria used to determine whether a person qualifies for a benefits offering, variable rate or coverage, compensation plan, checklist task, or other object for which eligibility must be established.

grade

A component of the employment model that defines the level of compensation for a worker.

job

A generic role that is independent of any single department or location. For example, the jobs Manager and Consultant can occur in many departments.

logical record

One or more physical records that constitute a date-effective object.

panel tab

A tab on the right side of the page that slides out when you open it. Each panel tab has an icon as the tab label.

physical record

A single record, with effective start and end dates, in the history of a date-effective object. Each physical record is a row in a database table.

position

A specific occurrence of one job that is fixed within one department. It is also often restricted to one location. For example, the position Finance Manager is an instance of the job Manager in the Finance Department.

qualification absence plan

A benefit that entitles workers to paid leave time as a result of an event, such as childbirth, illness, or injury.

regional area

The collapsible region in the work area that lets you control what's in the local area, for example by selecting a task or running a search.

user-defined criteria

Custom factors used to determine eligibility for objects such as benefits offerings and rates.

work relationship

An association between a person and a legal employer, where the worker type determines whether the relationship is a nonworker, contingent worker, or employee work relationship.