Oracle

Global Human Resources Cloud Implementing Absence Management

Release 12

This guide also applies to on-premises implementations

Oracle® Global Human Resources Cloud Implementing Absence Management

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Preface

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

Oracle Applications Help

Use the help icon ? to access Oracle Applications Help in the application. If you don't see any help icons on your page, click the Show Help icon ? in the global header. Not all pages have help icons. You can also access Oracle Applications Help at https://fusionhelp.oracle.com.

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1 Absence Management Implementation Overview

Implementing Absence Management: Overview

Use the Define Absences task list available in the Setup and Maintenance work area to set up absence management for your enterprise.

Getting Started

You implement Absence Management using the Absence Management functional area in the Workforce Deployment offering. Before you begin, use the Workforce Deployment section of the Setup and Maintenance work area to access reports for this offering. These reports include:

- Lists of setup tasks
- Descriptions of the functional areas and features you can select when you configure the offering
- Lists of business objects and enterprise applications associated with the offering

Absence Management Task Lists

You can access Absence Management setup tasks in the Setup and Maintenance work area by completing the following steps:

1. In the Offerings section, select **Workforce Deployment**.
2. In the Administration section, click **Setup** to open the Setup: Workforce Deployment page.
3. In the Functional Areas section, select **Absence Management**.
4. On the Absence Management section toolbar, show All Tasks.

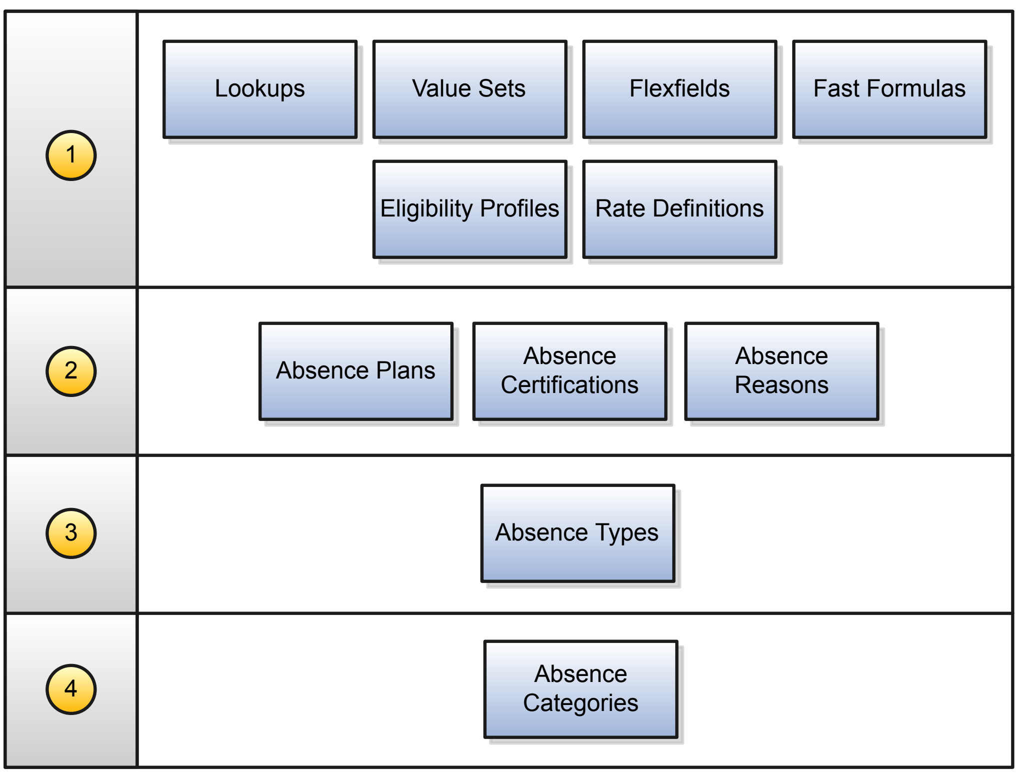
If you already implemented Oracle Fusion Global Human Resources, which is required for Absence Management processing, you completed many prerequisite tasks. The following table describes the task lists for the Absence Management functional area:

Task List	Description
Define General Absence	Use the tasks in this task list to review predefined lookups, value sets, and flexfields. You might want to extend or update those values before you set up the main absence components, such as absence types. The tasks in this task list are independent of specific absence components, and are not required to set up absences.
Define Absence Structures	Use the tasks in this task list to create these absence components: • Absence Certifications • Absence Reasons • Absence Plans • Absence Types

Task List	Description
	• Absence Categories
Define Absence Formulas and Rates	The tasks in the Define Absence Structures task list already contain predefined rules that you can use to define your absence policies. However, to set up additional rules, use the Manage Fast Formulas task to write your own formulas and associate them with the absence components. Use the Manage Rate Definitions task if you want to define the rate of payment during absence periods that pertain to specific absence plans.
Define Absence Time Periods	Use the Manage Repeating Time Periods task if you want to create repeating periods to determine how often a worker accrues leave in an accrual term.
Define Eligibility	Use the Manage Eligibility Profiles task in this task list to determine the set of eligible workers who can use specific absence plans and absence types.

Setup Sequence

This figure shows the sequence for setting up absence management.



Use the following steps to set up absence management:

1. Extend lookups, value sets, and flexfields based on your requirement. Write fast formulas to include rules in the absence objects in addition to the predefined ones. Create rate definitions to define payment rates for absence plans.
2. Create absence plans to define rules for time accruals and entitlements. Create certification requests that you want workers to complete to continue receiving entitlements during absence periods. Create absence reasons that you want workers to select while recording absences.
3. Create absence types, such as sickness leave or vacation, and associate each type with the relevant plans, reasons, and certifications.
4. Create absence categories, such as personal leave or medical leave, and associate them with the relevant absence types for reporting purposes.

Related Topics

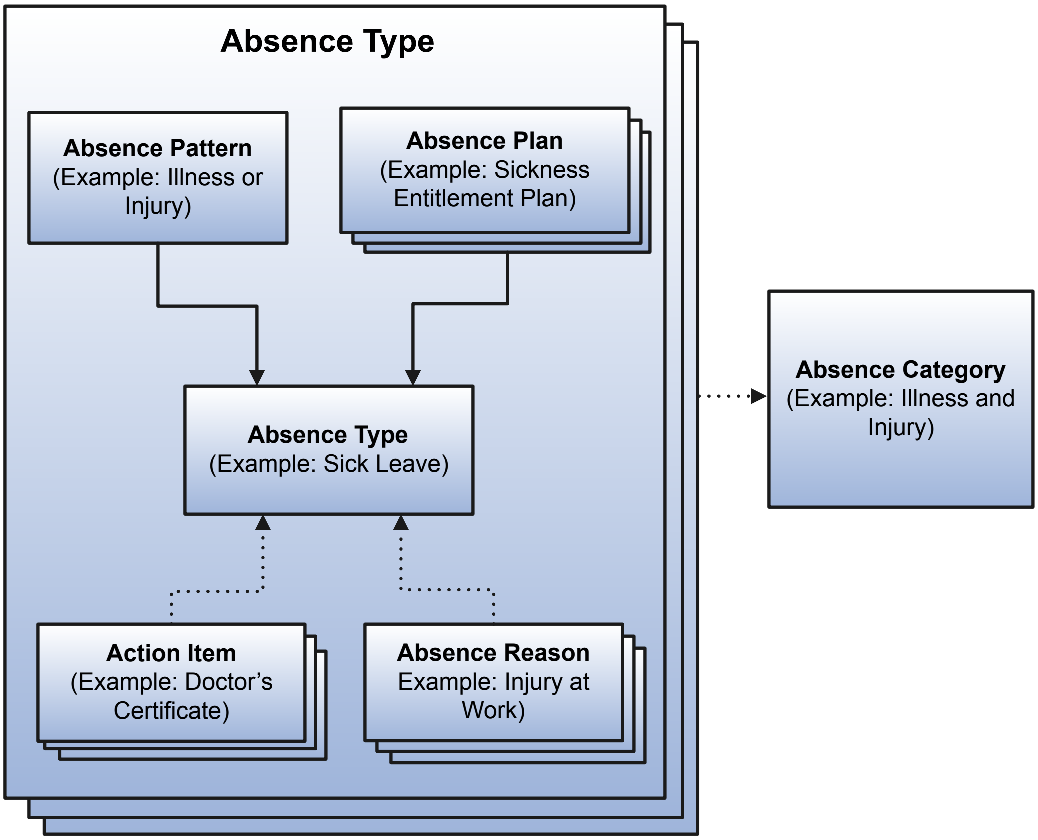
- Qualification Absence Plan Rules: Points to Consider
- Accrual Absence Plan Rules: Points to Consider
- Integrating Absence Management with Global Payroll: Procedure

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 an Absence Type for Scheduling Vacation Time: Worked Example
- Creating a Maternity Absence Qualification Plan: Worked Example
- Creating a Vacation Absence Accrual Plan: Worked Example
- Creating an Absence Certification Requirement: Worked Example

Managing an Implementation

Enabling Offerings: Explained

When planning your implementation, you decide what business processes your organization or company performs or supports. These decisions determine the offerings and functional areas you want to implement. You then configure the offerings and functional areas that support the activities your organization or company performs. During the configuration process, you specifically enable offerings and functional areas for use before you implement them.

Enabling Offerings and Functional Areas

Use the Setup and Maintenance work area to help decide which offerings to enable for implementation. Once you decide to use an offering, you can select the Configure button to choose the configuration details and enable the offering, associated functional areas, and features. All the base functional areas of an offering are automatically enabled for implementation when you enable the parent offering. You choose which optional functional areas to enable. The functional areas appear in an expandable and collapsible hierarchy to facilitate progressive decision making for implementation.

Enabling Features

Features are optional or alternative business rules or methods used to fine-tune business processes and activities supported by an offering or a functional area. If features are available for the offering or functional areas, you can enable them to help meet your business requirements, if desired. In general, the features are set with a default configuration based on their typical usage in most implementations. You should always review the available features for the offering and functional areas and select them as appropriate. Dependent features appear visible when the feature choice they depend on is selected for implementation.

Enabling Offerings: Procedure

You enable offerings to customize the functionality that matches the services you plan on implementing.

Enabling Offerings

To enable offerings, follow these steps.

1. Open the Setup and Maintenance work area **(Navigator > Setup and Maintenance)**.
2. In the Setup and Maintenance Offerings page, select the offering you're using, then click **Configure**.
3. In the Configure page, select the **Enable** check box for the offering. Also select the **Enable** check box for each of the functional areas you want to use.
4. Click the Features icon for the offering or functional area you have enabled, then enable any features you require. Select **Done** when complete.
5. Select **Done** to return to the Offerings page then repeat the same steps for each of the offerings you are using.

Worker Availability: How It Is Determined

The availability of a worker during a selected time period is automatically determined using:

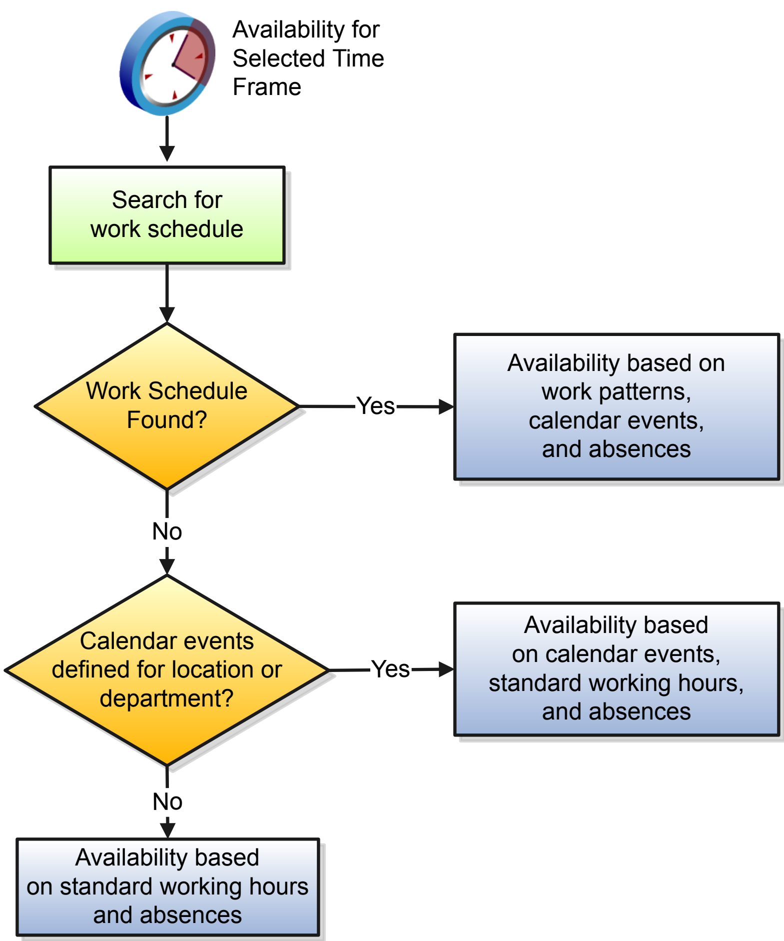
- Absence entries during that period
- The work schedule that the worker presently follows
- Calendar events

Settings That Affect Worker Availability

You specify which work schedules assigned to the worker's primary assignment or workforce structures are primary.

How Worker Availability Is Determined

The following figure shows how worker availability is determined.



The application searches for primary work schedules that were assigned to these workforce structure levels in the following order:

1. Primary assignment of the worker
2. Position
3. Job
4. Department
5. Location

6. Legal Employer
7. Enterprise

If there is no primary schedule assigned to any of the workforce structures, then the worker availability is determined by:

- Absences
- Calendar events, if created for the worker's location or department
- Standard working hours defined for the worker's primary assignment

If there are no calendar events created, then the application determines availability based on standard working hours and absences.

To determine availability, work schedules assigned to lower workforce structure levels take precedence over those defined at higher levels.

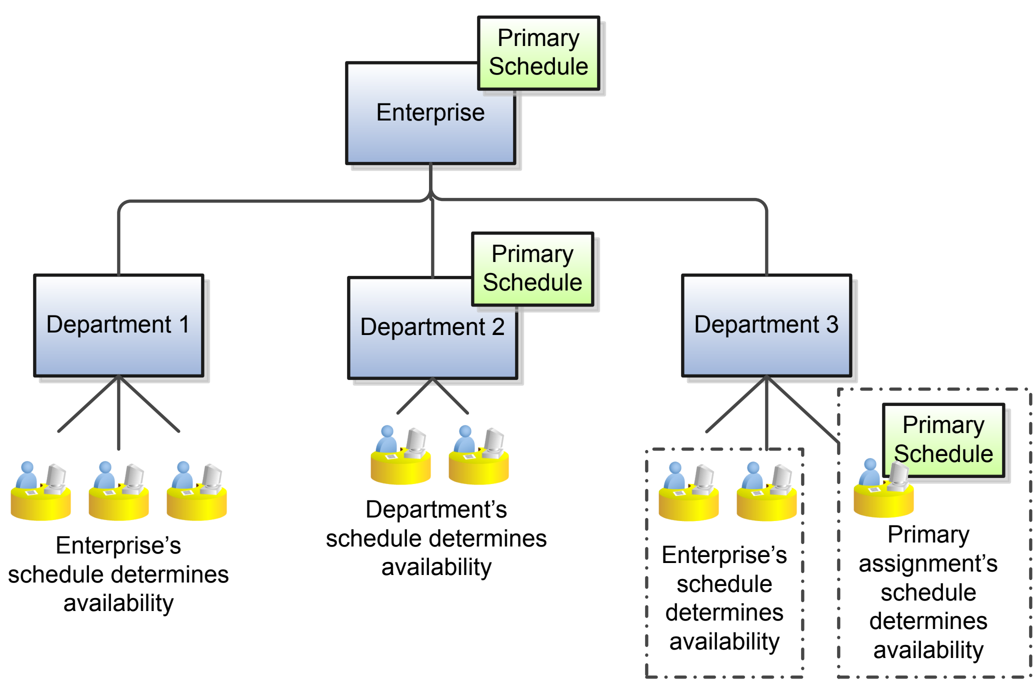
Scenario 1: You assigned a primary schedule at the enterprise level. However, since workers belonging to a particular department in that enterprise follow different work timings, you assigned a different primary schedule to that department.

Results: The department's primary schedule determines worker availability because that schedule takes precedence over the schedule defined at the enterprise level.

Scenario 2: In the same example, you assigned a primary schedule to a worker (primary assignment) belonging to the same department.

Results: That schedule determines the worker's availability because a schedule assigned to the primary assignment takes precedence over the ones defined at the department level and the enterprise level.

The following diagram illustrates this example:



The work patterns and exceptions that exist in the primary work schedule, and any absence entries during the selected time period, impact worker availability.

2 Absence Lookups, Value Sets, and Flexfields

Lookups: Explained

Lookups are lists of values in applications. You define a list of values as a lookup type consisting of a set of lookup codes, each code's translated meaning, and optionally a tag. End users see the list of translated meanings as the available values for an object.

Lookups provide a means of validation and lists of values where valid values appear on a list with no duplicate values. For example, an application might store the values Y and N in a column in a table, but when displaying those values in the user interface, Yes or No (or their translated equivalents) should be available for end users to select. For example, the two lookup codes Y and N are defined in the REQUIRED_INDICATOR lookup type.

In another example, a lookup type for marital status has lookup codes for users to specify married, single, or available legal partnerships.

Lookup Type	Lookup Code	Meaning	Tag
MAR_STATUS	M	Married	
	S	Single	
	R	Registered Partner	+NL
	DP	Domestic Partner	-FR, AU

In this case, tags are used for localizing the codes. All legislations list Married and Single. Only the Dutch legislation lists Registered Partner. And all legislations except France and Australia also list Domestic Partner.

When managing lookups, you need to understand the following.

- Using lookups in applications
- Customization levels
- Accessing lookups
- Enabling lookups
- The three kinds of lookups: standard, common, and set enabled

Using Lookups in Applications

Use lookups to provide validation or a list of values for a user input field in a user interface.

An example of a lookup used for validation is a flexfield segment using a table-validated value set with values from a lookup type. An example of a lookup in a list of values is a profile option's available values from which users select one to set the profile option. Invoice Approval Status gives the option of including payables invoices of different approval statuses in a report. The lookup code values include All, so that users can report by all statuses: Approved, Resubmitted for approval, Pending or rejected, and Rejected.

Customization Level

The customization level of a lookup type determines whether the lookups in that lookup type can be edited. This applies data security to lookups.

Some lookup types are locked so no new codes and other changes can be added during implementation or later, as needed. Depending on the customization level of a lookup type, you may be able to change the codes or their meanings. Some lookups are designated as extensible, so new lookup codes can be created during implementation, but the meanings of predefined lookup codes cannot be modified. Some predefined lookup codes can be changed during implementation or later, as needed.

The customization levels are user, extensible, and system. The following table shows which lookup management tasks are allowed at each customization level.

Allowed Task	User	Extensible	System
Deleting a lookup type	Yes	No	No
Inserting new codes	Yes	Yes	No
Updating start date, end date, and enabled fields	Yes	Yes, only if the code is not predefined data	No
Deleting codes	Yes	Yes, only if the code is not predefined data	No
Updating tags	Yes	No	No
Updating module	Yes	No	No

Predefined data means LAST_UPDATED_BY = SEED_DATA_FROM_APPLICATION.

If a product depends on a lookup, the customization level must be system or extensible to prevent deletion.

Once the customization level is set for a lookup type, it can't be modified. The customization level for lookup types created using the Define Lookups page is by default set at the User level.

Standard, Common, and Set-Enabled Lookups

The available kinds of lookups are as follows.

Lookup	Description
Standard	Lists the available codes and translated meanings
Set enabled	Additionally associates a reference data set with the lookup codes
Common	Legacy lookups

Standard lookups are the simplest form of lookup types consisting only of codes and their translated meaning. They differ from common lookups only in being defined in the standard lookup view.

Common lookups exist for reasons of backward compatibility and differ from standard lookups only in being defined in the common lookup view.

Set enabled lookup types store lookup codes that are enabled for reference data sharing. At runtime, a set-enabled lookup code is visible because the value of the determinant identifies a reference data set in which the lookup code is present.

Accessing Lookups

Standard, set-enabled, and common lookups are defined in the Standard, Set-enabled, and Common views, respectively. Applications development may define lookups in an application view to restrict the UI pages where they may appear.

In lookups management tasks, lookups may be associated with a module in the application taxonomy to provide criteria for narrowing a search or limiting the number of lookups accessed by a product specific task such as Manage Purchasing Lookups.

Enabling Lookups

A lookup type is reusable for attributes stored in multiple tables.

Enable lookups based on the following.

- Selecting an **Enabled** check box
- Specifying an enabled start date, end date, or both
- Specifying a reference data setdeterminant

If you make changes to a lookup, users must sign out and back in before the changes take effect. When defining a list of values for display rather than validation, limit the number of enabled lookup codes to a usable length.

For more information on the predefined lookups and lookup codes, open the Setup and Maintenance work area, and use the tasks in the Define Lookups task list.

Translating Lookups

You can translate the lookups that you defined to the preferred language(s) without changing the language session of the application. Use the translation option available on the lookup code table. By default, for each lookup, all the allowed language rows in the translator dialog box appear in the source language (the current session language). When you edit a particular language entry, you can modify the translated meaning and description to the language in which you want the lookup to appear. Once the updates are made, the end-users can view the lookup in the translated text.

> **Note:** You can add the translation for only as many languages as are permitted by the administrator. The functionality to limit the number of languages displayed on the dialog box is controlled through the Translation Editor Languages profile option. It can be set at the SITE or USER level. If nothing is specified, all active languages are displayed.

Related Topics

- Modules in Application Taxonomy: Explained

- Managing Set-Enabled Lookups: Examples
- What's the difference between a lookup type and a value set?
- Managing a Standard Lookup: Example
- How can I access predefined lookups?

Flexfields and Value Sets: How They Work Together

Value sets are specific to your enterprise. When gathering information using flexfields, your enterprise's value sets validate the values that your users enter based on how you defined the value set.

You can assign a value set to any number of flexfield segments in the same or different flexfields. Value set usage information indicates which flexfields use the value set.

The following aspects are important in understanding how flexfields and value sets work together:

- Defining value sets
- Shared value sets
- Deployment

Defining Value Sets

As a key flexfield guideline, define value sets before configuring the flexfield, because you assign value sets to each segment as you configure a flexfield. With descriptive and extensible flexfields, you can define value sets when adding or editing a segment.

> **Note:** Ensure that changes to a shared value set are compatible with all flexfield segments that use the value set.

Shared Value Sets

When you change a value in a shared value set, the change affects the value set for all flexfields that use that value set. The advantage of a shared value set is that a single change propagates to all usages. The drawback is that the change shared across usages may not be appropriate in every case.

Value Set Values

To configure custom attributes to be captured on the value set values screen in the Manage Value Sets task, configure the Value Set Values descriptive flexfield. The object's code is FND_VS_VALUES_B.This flexfield expects the context code to correspond to the value set code. For each value set, you can define a context whose code is the value set code, and whose context-sensitive segments are shown for the values of that value set. By default, the context segment is hidden since it maps to the value set code and is not expected to be changed.

You can also define global segments that are shown for all value sets. However, this would be quite unusual since it would mean that you want to capture that attribute for all values for all value sets.

Deployment

When you deploy a flexfield, the value sets assigned to the segments of the flexfield provide users with the valid values for the attributes represented by the segments.

Related Topics

- Flexfield Deployment: Explained
- Flexfields and Oracle Applications Cloud Architecture: How They Work Together
- Defining Value Sets: Critical Choices

Flexfields: Overview

A flexfield is an extensible set of placeholder fields associated with business objects and placed on the application pages. You can use flexfields to extend the business objects and meet enterprise data management requirements without changing the data model or performing any database programming. Flexfields help you to capture different data on the same database table.

For example, an airline manufacturer may require specific attributes for its orders that aren't predefined. Using a flexfield for the order business object, you can create and configure the required attribute.

Flexfields that you see on the application pages are predefined. However, you can configure or extend the flexfields, or modify their properties. Users see these flexfields as field or information attributes on the UI pages. To use flexfields, search for and open the **Define Flexfields** task list in the Setup and Maintenance work area. You can use the following tasks contained within it:

- **Manage Descriptive Flexfields**: Expand the forms on the application page to accommodate additional information that is important and unique to your business. You can use a descriptive flexfield to collect custom invoice details on a page displaying invoices.
- **Manage Extensible Flexfields**: Establish one-to-many data relationships and make application data context-sensitive. The flexfields appear only when the contextual data conditions are fulfilled. Thus, extensible flexfields provide more flexibility than the descriptive flexfields.
- **Manage Key Flexfields**: Store information combining several values, such as a number combination. The key flexfields represent objects such as accounting codes and asset categories.
- **Manage Value Sets**: Use a group of values to validate the data entered in the flexfields.

> **Note:** You can manage value sets within the Manage Descriptive Flexfields or Manage Extensible Flexfields tasks.

For more information about specific predefined flexfields, open the Setup and Maintenance work area, and use the tasks in the Define Flexfields task list.

Types of Flexfields

The following three types of flexfields provide a means to customize the applications features without programming:

- Descriptive
- Extensible
- Key

Related Topics

- How can I access predefined flexfields?
- Descriptive Flexfields: Explained
- Extensible Flexfields: Explained
- Key Flexfields: Explained
- Modules in Application Taxonomy: Explained

3 Formula Creation and Error Handling for Absence Management

Using Formulas: Explained

Fast formulas are generic expressions of calculations or comparisons that you want to repeat with different input variables. Each formula usage summarized in this topic corresponds to one or more formula types, requiring specific formula inputs and outputs. You can use the Manage Fast Formulas task in the Setup and Maintenance work area, or work areas relevant to the formula type, such as Payroll Calculation.

Note: Requirements for specific formula inputs and outputs are explained in separate chapters of the Oracle Global HR Cloud: Using Fast Formula guide.

Calculate Payrolls

You can write payroll calculations and skip rules for elements to represent earnings and deductions.

With fast formulas you can:

- Associate more than one payroll formula with each element to perform different processing for employee assignments with different statuses.
- Define elements and formulas for earnings and deductions with highly complex calculations requiring multiple calls to the database.
- Associate a skip rule formula with an element to define the circumstances in which it's processed.
- Customize the predefined proration formula to control how payroll runs prorate element entries when they encounter an event, such as a mid-period change in an element entry value.

Define Custom Calculations for Benefits Administration

You can use formulas to structure your benefit plans. Formulas provide a flexible alternative to the delivered business rules. Use formulas to configure:

- Date calculations, such as enrollment start and end dates, rate or coverage start and end dates, waiting periods and enrollment periods, or action item due dates
- Calculations of rate and coverage amount, minimum and maximum, or upper and lower limits
- Certification requirements
- Partial month and proration calculations
- Eligibility and participation evaluation

For example, you can write a formula to calculate benefits eligibility for those cases where the provided eligibility criterion does not accommodate your particular requirements.

Note: For more information, see Benefits Fast Formula Reference Guide (1456985.1) on My Oracle Support at https://support.oracle.com.

Validate Element Inputs or User-Defined Tables

Use lookups or maximum and minimum values to validate user entries.

For more complex validations you can write a formula to check the entry. You can also use a formula to validate entries in user tables.

Edit the Rules for Populating Work Relationship or Payroll Relationship Groups

You can define criteria to dynamically populate a payroll relationship group or work relationship group.

When you create a payroll relationship group or work relationship group formula type, you can choose to use an expression editor or a text editor. The expression editor makes it easy to build criteria to define the group. For more complex conditions, such as validations, you can select the text editor.

Define Custom Configuration for Compensation

To extend the existing flexibility of compensation plan configuration write formulas to customize:

- Start and end dates for compensation allocations under individual compensation plans
- Person selection, hierarchy determination, column default values, and currency selection for workforce compensation plans
- The source of items displayed in total compensation statements

Define Formulas to Create Rule Templates for Time and Labor

Use formulas with time repository rule templates to create rules. The formulas contain delivered combinations of rule parameters and output results. You can use one formula with multiple rule templates by varying the template configuration.

When creating a rule template, you select a formula name and then configure the parameter type and display name of the parameters and variables. You don't have to work with the entire formula statement to determine which details to change to achieve a particular outcome.

Use formulas in Time and Labor to utilize:

- Logic for processing or calculating time
- Parameters that enable rules to pass values to the formula for use in calculations
- Output variables that the formula uses to return calculation results to the rules

For example, the Period Maximum Hours Template uses the WFM_PERIOD_MAXIMUM_TIME_ENTRY_RULE formula to compare reported time category hours to defined maximum hours.

> **Note:** For more information, see Time and Labor Fast Formula Reference Guide (1990057.1) on My Oracle Support at https://support.oracle.com.

Formulas for Absence Type Rules

Use the Manage Absence Types pages to define absence type rules. However, if you want to define other special rules to suit your requirement, you can write your own formulas.

Formulas for Absence Types

The following table lists the aspects of an absence type for which you can write a formula and identifies the formula type for each.

Rule	Description	Formula Type to Use
Conversion	Method to convert the absence duration to other units of measure. For example, your workers' work schedules are in work hours, but you want to display the duration in work days.	Global Absence Type Duration You can use the formula to convert absence duration values that are in work days or work hours only.
Validation	Rules in addition to the ones that you can define on the Manage Absence Types pages to check the validity of the absence.	Global Absence Entry Validation

Formulas for Accrual Plan Rules

Use the Manage Absence Plan page to apply delivered accrual plan rules in the plan. However, if you want to define other special rules to suit your requirement, you can write your own formulas.

Formulas for Accrual Plan Rules

The following table lists the aspects of an accrual plan for which you can write a formula and identifies the formula type for each.

Rule	Description	Formula Type to Use
Enrollment Start	Date when eligible workers are enrolled in the plan. If a worker is already enrolled in an existing accrual plan, you can't use this formula to change the enrollment start date.	Global Absence Plan Enrollment Start
Enrollment End	Date when workers are disenrolled from the plan. This formula works only if there is an eligibility profile associated with the plan.	Global Absence Plan Enrollment End
Conversion Formula	Method to override the default absence plan entry duration.	Global Absence Plan Duration

Rule	Description	Formula Type to Use
	Example: You might have a requirement to consider only whole working days in a vacation absence to update the accrual balance. In such cases, you define logic in a formula to convert the absence duration to a value that excludes partial days.	
Anniversary Event	Method to determine the employment anniversary date on which you want the accrual plan to restart.	Global Absence Plan Period Anniversary Event Date
Accrual Vesting	A period during which workers accrue time, but cannot use it.	Global Absence Vesting
Accrual Proration	Method to calculate the time workers accrue if they enroll in the middle of an accrual period.	Global Absence Proration
Ceiling	The maximum time that a worker can accrue.	Global Absence Ceiling
Ceiling Proration	Method to return a multiplying factor to prorate the defined ceiling limit.	Global Absence Ceiling Proration
Carryover	The maximum unused time that a worker can transfer to the next accrual term.	Global Absence Carryover
Carryover Proration	Method to return a multiplying factor to prorate the defined carryover amount.	Global Absence Carryover Proration
Accrual Definition	Method to determine the paid time, eligible workers accrue over the course of an accrual term.	Global Absence Accrual
Accrual Formula	Range of eligibility criteria that identify how much paid time eligible workers accrue over the course of an accrual term. The criteria may be years of service, grades, hours worked, or some other factor that you can define.	Global Absence Accrual Matrix
Partial Accrual Period	Method to determine the prorated accrual amount for workers who enroll or disenroll from a plan during the plan period.	Global Absence Partial Accrual Period Rate
Absence Payment Rate	Method to calculate payment during absence period.	Global Absence Plan Use Rate
Discretionary Disbursement Rate	Method to calculate payment when paying out part of the accrual balance.	Global Absence Plan Use Rate
Final Disbursement Rate	Method to calculate payment of accruals when plan participation ends.	Global Absence Plan Use Rate

Rule	Description	Formula Type to Use
Liability Rate	Method to calculate cost of accrual balance to determine employer liability.	Global Absence Plan Use Rate

For an accrual plan, you can also use the Global Absence Accrual Event formula to capture events that affect the accrual band of a worker during a calendar year.

Example: An organization has a vacation plan in which enrolled workers accrue a certain number of days every year based on their grade. When the grade of a worker changes in the middle of the calendar year, the organization might want to prorate their total accrual balance. You can configure this proration rule using the global absence accrual event formula to capture the dates when such changes occur.

This formula cannot be attached to the plan definition at any point. When you create this formula, the formula name needs to be the same as the absence plan name. This automatically links the formula to the plan.

Formulas for Qualification Plan Rules

Use the Manage Absence Plan page to incorporate qualification plan rules. However, if you want to define other special rules to suit your requirement, you can write your own formulas.

Formulas for Qualification Plan Rules

The following table lists the aspects of a qualification plan for which you can write a formula and identifies the formula type for each.

Rule	Description	Formula Type to Use
Start Rule	When the rolling backward plan term starts. A rolling backward term is a specific time period that precedes the absence start date.	Global Absence Plan Roll Backward End
Qualification Date Rule	Date when eligible workers enroll in the plan.	Global Absence Plan Enrollment Start Date
Conversion Formula	Method to calculate the absence duration differently. Example: You want to consider only whole working days in a sickness absence in the entitlement calculation. In such cases, you define logic in a formula to convert the absence duration to a value that excludes partial working days.	Global Absence Plan Duration
Entitlement Definition Type	Determines payment percentages to apply during the absence period.	Global Absence Entitlement
Entitlement Formula (Qualification Details section)	A level that determines the payment that workers receive for a specific number of days	Global Absence Band Entitlement

Rule	Description	Formula Type to Use
	during a long leave of absence based on their length of service.	
Absence Payment Rate Rule	Method to calculate payment during absence period.	Global Absence Plan Use Rate

Writing a Fast Formula Using Formula Text: Worked Example

This example demonstrates how to create a fast formula using the text editor to return the range of scheduled hours for managers and a different range for other workers.

Before you create your formula, you may want to determine the following:

Decisions to Consider	In This Example
Is the formula for a specific legislative data group?	No, this is a global formula that can be used by any legislative data group.
What is the formula type for this formula?	Range of Scheduled Hours
Are there any contexts used in this formula?	No
Are there any database item defaults?	Yes, ASG_JOB
Are there any input value defaults?	No
What are the return values?	MIN_HOURS, MAX_HOURS, FREQUENCY

Creating a Fast Formula Using the Text Editor to Determine a Manager's Scheduled Hours

1. On the Overview page in the Setup and Maintenance work area, search for the Manage Fast Formulas Task.
2. Click **Go to Task**.
3. On the Manage Fast Formula page, click the **Create** icon to create a new formula.
4. On the Create Fast Formula page, complete the fields as shown in this table.

Field	Value
Formula Name	Manager Range of Scheduled Hours

Field	Value
Formula Type	Range of Scheduled Hours
Description	Manager's Range of Hours
Effective Start Date	1-Jan-2010

5. Click **Continue**.
6. Enter the following formula details in the Formula Text section:

```
/* DATABASE ITEM DEFAULTS BEGIN */
DEFAULT FOR asg_job IS ' '
/* DATABASE ITEM DEFAULTS END */
JOB_1 = ASG_JOB
IF JOB_1 = 'Manager' then
(MIN_HOURS = 25
MAX_HOURS = 40
FREQUENCY = 'H')
else
(MIN_HOURS = 20
MAX_HOURS = 35
FREQUENCY = 'H')
return MIN_HOURS, MAX_HOURS, FREQUENCY
```

7. Click **Compile**.
8. Click **Save**.

Related Topics

- Using Formula Components: Explained
- Formula Operators: Explained

Formula Performance Improvements: Explained

When writing formulas there are a number of techniques to follow to ensure your formulas are easy to read, use, understand, and process efficiently.

Variable Names and Aliases

To improve readability, use names that are brief yet meaningful. Use aliases if the names of database items are long. Name length has no effect on performance or memory usage.

Inputs Statements

Use INPUTS statements rather than database items whenever possible. It speeds up the running of your payroll by eliminating the need to access the database for the input variables.

An example of inefficient formula without INPUTS statement is:

```
SALARY = SALARY_ANNUAL_SALARY / 12
RETURN SALARY
```

An example of efficient use of INPUTS statements is:

```
INPUTS ARE ANNUAL_SALARY
SALARY = ANNUAL_SALARY / 12
RETURN SALARY
```

Database Items

Do not refer to database items until you need them. People sometimes list at the top of a formula all the database items the formula might need, thinking this helps the formula process more quickly. Doing this, however, causes unnecessary database calls which slows processing.

An example of an inefficient use of database items is:

```
S = SALARY
A = AGE
IF S < 20000 THEN
IF A < 20 THEN
TRAINING_ALLOWANCE = 30
ELSE
TRAINING_ALLOWANCE = 0
```

An example of an efficient use of database items is:

```
IF SALARY < 20000 THEN
IF AGE < 20 THEN
TRAINING_ALLOWANCE = 30
ELSE
TRAINING_ALLOWANCE = 0
```

The first example always causes a database fetch for AGE whereas the second example only fetches AGE if salary is less than 20000.

Balance Dimensions

Wherever possible, only use balance dimensions for single assignments in formulas. Multiple assignments require more calculation time, leading to slower processing time.

Normally, only a small number of workers have multiple assignments. The presence of a small number doesn't lead to any significant increase in overall processing time. However, there could be a problem if you unnecessarily link balance dimensions for multiple assignments into general formulas.

Formula Compilation Errors: Explained

Compilation errors display in the Manage Fast Formulas page after you compile the formula. The compiler aborts the compilation process when it encounters an error. Error messages display the line number and type of error encountered.

Common Compilation Errors

This table lists the type and description of several common formula compilation errors.

Formula Error	Description
Syntax Error	The formula text violates the grammatical rules for the formula language. An example is using IF1 instead of IF for an IF statement.
Incorrect Statement Order	ALIAS, DEFAULT, or INPUT statements come after other statements.
Misuse of ASSIGNMENT Statement	Occurs when any of these conditions exist: • An **ASSIGNMENT** assigns a value to a database item. • A context is assigned a value externally to a **CHANGE_CONTEXTS** statement. • The formula assigns a value to a non-context variable within a **CHANGE_CONTEXTS** statement. CHANGE_CONTEXTS statements can be used in a formula.
Misuse of ALIAS Statement	You can only use an ALIAS statement for a database item.
Missing DEFAULT Statement	A database item that specifies defaulting must have a DEFAULT statement.
Misuse of DEFAULT Statement	A DEFAULT statement is specified for a variable other than an input or database item.
Uninitialized Variable	The compiler detects that a variable is uninitialized when used. The compiler can't do this in all cases. This error often occurs when the formula includes a database item that requires contexts that the formula type doesn't support. The formula treats the database item as a local variable. For example, balance database items require the PAYROLL_ REL_ACTION_ID PAYROLL_ ASSIGNMENT_ID and CALC_ BREAKDOWN_ ID contexts. Generally you can only use them in formulas of type Oracle Payroll.
Missing Function Call	The compiler does not recognize a function call. The combination of return type, function name, and parameter types does not match any available function.
Incorrect Operator Usage	An instance of a formula operator use doesn't match the permitted uses of that operator. For example, the + operator has two permitted uses. The operands are both of data type NUMBER, or both of data type TEXT.
Inconsistent Data Type Usage	The formula uses a formula variable of more than one data type. Or the formula uses a database item or context with the wrong data type. For example, Variable A is assigned a NUMBER value at the start of the formula, but is assigned a TEXT value later in the formula.
EXIT Statement Not Within WHILE Loop	A condition that eventually becomes false or an EXIT call for exiting the loop doesn't exist.
Misuse of Context	The formula uses a variable as a context, or a context as a variable. For example, a formula assigns a value to AREA1 as an ordinary variable, but later uses AREA1 as a context in a GET_CONTEXT call.

Formula Execution Errors: Explained

Fast formula execution errors occur when a problem arises while a formula is running. The usual cause is a data problem, either in the formula or in the application database.

Formula Execution Errors

This table lists the type and description of each formula execution error.

Formula Error	Description
Uninitialized Variable	Where the formula compiler can't fully determine if a variable or context is initialized, it generates code to test if the variable is initialized. When the formula executes, this code displays an error if the variable or context isn't initialized.
Divide by Zero	Raised when a numeric value is divided by zero.
No Data Found	Raised when a non-array type database item unexpectedly fails to return any data. If the database item can't return data, then it should provide a default value. You can do this by creating a default statement. An error in formula function code can also cause this error message.
Too Many Rows	Raised when a non-array type database item unexpectedly returns more than a single row of data. The cause is an incorrect assumption made about how the data is being accessed. An error in the formula function code can also cause this error message.
NULL Data Found	Raised when a database item unexpectedly returns a NULL data value. If the database item can return a NULL value, then it provides a default value. **Note:** Some database items can't return a NULL value. If it can, then you can provide a default value for that database item.
Value Exceeded Allowable Range	Raised for a variety of reasons, such as exceeding the maximum allowable length of a string.
Invalid Number	Raised when a formula attempts to convert a non numeric string to a number.
User Defined Function Error	Raised from within a formula function. The error message text is provided as part of the formula error message.
External Function Call Error	A formula function returned an error, but didn't provide any additional information to the formula code. The function might have sent error information to the logging destination for the executing code.
Function Returned NULL Value	A formula function returned a NULL value.

Formula Error	Description
Too Many Iterations	A single WHILE loop, or a combination of WHILE loops, has exceeded the maximum number of permitted iterations. The error is raised to terminate loops that can never end. This indicates a programming error within the formula.
Array Data Value Not Set	The formula attempted to access an array index that has no data value. This error occurs in the formula code.
Invalid Type Parameter for WSA_EXISTS	An invalid data type was specified in the WSA_EXISTS call.
Incorrect Data Type For Stored Item	When retrieving an item using WSA_GET, the actual data type doesn't match that of the stored item. This error occurs within the calling formula.
Called Formula Not Found	The called formula couldn't be resolved when attempting to call a formula from a formula. This issue could be due to an error in the calling formula, or because of installation issues.
Recursive Formula Call	An attempt was made to call a formula from itself. The call could be made directly or indirectly from another called formula. Recursive formula calling isn't permitted.
Input Has Different Types In Called and Calling Formulas	When calling a formula from a formula, the input data type within the called formula doesn't match the data type specified from the calling formula.
Output Has Different Types In Called and Calling Formulas	When calling a formula from a formula, the output data type within the called formula doesn't match the data type specified from the calling formula.
Too Many Formula Calls	There are too many formula calls from other formulas.

FAQs

When do I run the Compile Formula process?

When you create or update multiple fast formulas at the same time, run the Compile Formula process on the Submit a Process or Report page from the Payroll Administration work area.

What's the difference between a formula compilation error and an execution error?

Compilation errors occur on the Manage Fast Formulas page when you compile the formula. An error message explains the nature of the error. Common compilation errors are syntax errors resulting from typing mistakes. You can view error messages on the dashboard or go to the messages tab directly after the process is run.

Execution errors occur when a problem arises while a formula is running. The usual cause is a data problem, either in the formula or in the application database.

4 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.

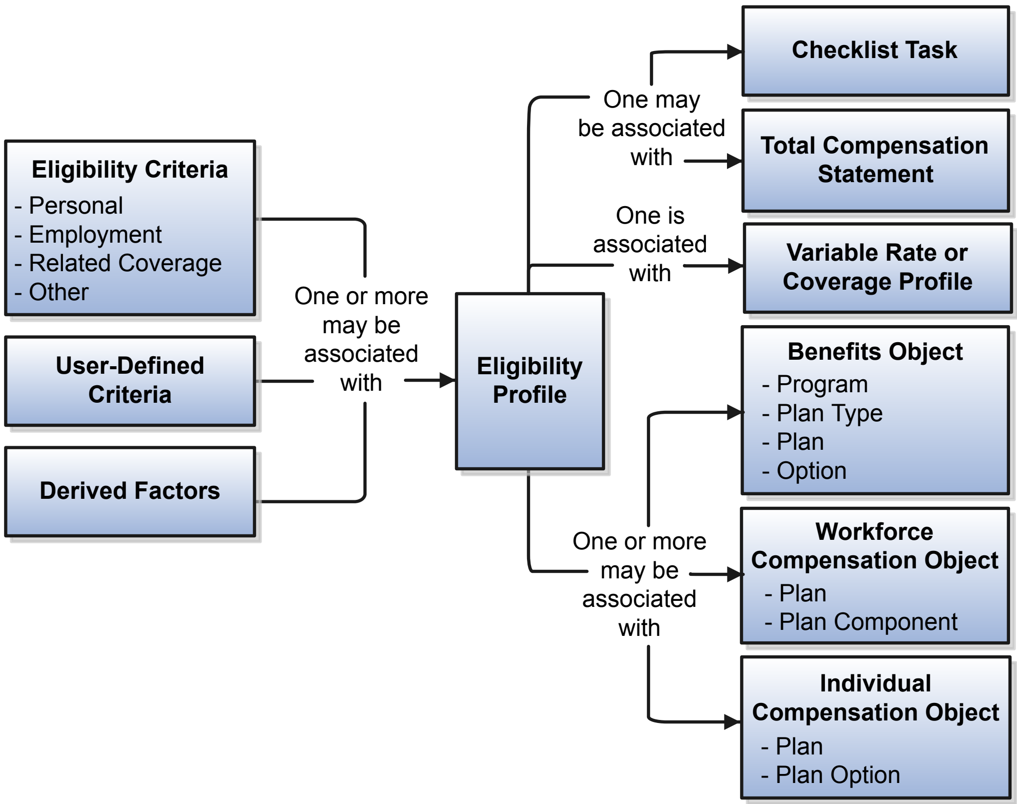
Related Topics

- 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:

Setting	Description
Profile Type	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.
Usage	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.
Assignment to Use	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

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

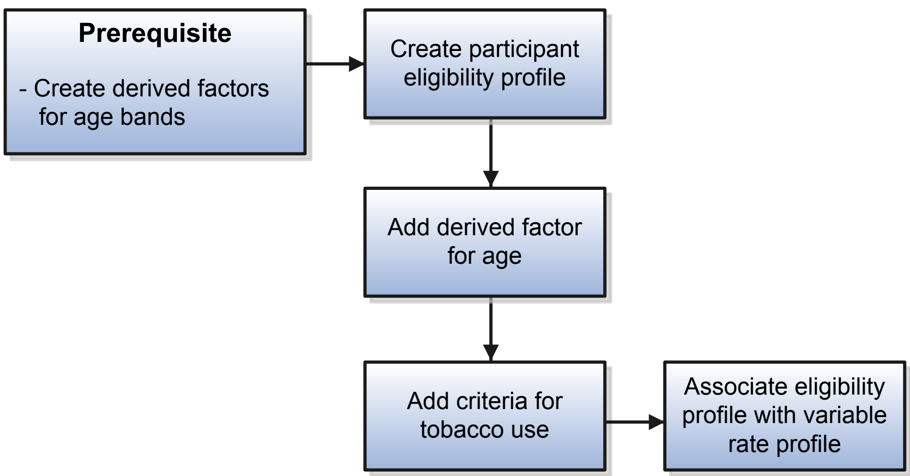
Creating an Eligibility Profile: Worked Example

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 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.

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.

5 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

6 Elements for Absence Management

Define Elements, Balances, and Formulas: Overview

The Define Elements, Balances, and Formulas task list contains the tasks required for creating payroll elements for compensation and HR management. You can use this task list if you're recording earnings, deductions, and other payroll data for reporting, compensation and benefits calculations, or transferring data to a third-party payroll provider.

Note: If you're using Oracle Fusion Global Payroll, use the Define Payroll task list instead. The Define Payroll task list includes additional tasks required to set up payroll processing.

Required Tasks

Your business requirements and product usage determine which required tasks and other payroll-related tasks you perform. The required tasks are:

- Manage Elements
- Manage Payroll Definitions, which is usually required to support elements
- Manage Consolidation Groups, which is required for creating payroll definitions

If you use predefined Payroll Interface extracts to transfer data to a third-party payroll provider, you may need to create element subclassifications, balances, organization payment methods, and object groups. Refer to the Global Payroll Interface documentation for more information.

Prerequisite Tasks

The Workforce Deployment and Compensation Management offerings include the Define Elements, Balances, and Formulas task list. These offerings contain other tasks that you must complete first, as shown in the following table.

Task	Use To	Why It's Important
Manage Legal Entities	Create payroll statutory units.	Ensures that hiring employees automatically creates payroll relationship records.
Manage Legal Entity HCM Information	Associate a legislative data group with each payroll statutory unit.	As above.
Manage Features by Country or Territory	Select Payroll Interface as the extension for any countries or territories where you extract HR data to send to a third-party payroll provider.	Ensures that you use the appropriate element templates to create earnings.

Configure Legislations for Human Resources

Use this task to create and edit legislative data for a country or territory that doesn't have a predefined country extension. It guides you through configuring some payroll objects and values required for creating elements, including:

- Tax year start date
- Period of service on rehire rules
- Default currency
- Element classifications
- Component groups
- Payment types

Important: Complete this task before the other tasks in this task list.

Manage Elements

Use elements to communicate payment and distribution information to payroll applications from the source applications listed in the following table.

Source Application	Element Purpose	Requirements
Compensation	• Earnings and deduction elements, such as bonuses, overtime earnings, and voluntary deductions. • Information elements to load custom data to use during a workforce compensation cycle.	Required for compensation plans and base pay, no matter which HR and payroll applications you're using.

Benefits	• Deduction elements to record activity rate calculation results, such as:
	  ◦ Employee contributions and employer distributions for medical options
	  ◦ Flex credits for flex offerings
	• Earnings elements if you set up your flex offering to disburse unused credits as cash.
		Required if you use element entries to communicate benefits rate information to any payroll application.
		
		Restriction: You must select Payroll Relationship as the employment level.

Time and Labor	Earnings elements with input value of Hours.	Required if you pay worked time based on time card entries.
Absence Management	Earnings elements with input value of Hours.	Required if you process absence payments and book employer liability of accrual balances through Global Payroll or Global Payroll Interface.

Manage Payroll Definitions

Employees' employment terms or assignments include their assigned payrolls. The payroll definition supplies the payroll period frequency and end dates, which some applications use for calculations. The following table shows which Oracle Fusion HCM applications require payroll definitions.

Application	Payroll Definition Required?	Usage Conditions
Global Payroll Interface	Yes	N/A
Compensation	Yes	N/A
Benefits	Optional	Required to use the payroll period frequency to calculate communicated rates or values passed to payroll.
Time and Labor	Optional	Required to pass time entries to payroll calculation cards for payroll processing or for extract to a third-party payroll application.
Absence Management	No	N/A

Manage Consolidation Groups

You must have at least one consolidation group for each legislative data group where you create elements. Payroll definitions require a consolidation group.

Other Payroll-Related Setup Tasks

Your implementation might require other tasks in the Define Elements, Balances, and Formulas task list, as shown in the following table.

Task	Requirements
Manage Organization Payment Methods	If you want to record personal payment methods for your employees, you must create organization payment methods and associate them with your payroll definitions. Organization payment methods define the combination of payment type and currency to use for payments to employees or external parties.
Manage Element Classifications	Primary element classifications are predefined. If you run the Calculate Gross Earnings process (provided with Global Payroll Interface), you might create subclassifications to feed user-defined balances.

Task	Requirements
Manage Fast Formulas	You can write formulas for a number of uses, including: • Validating user entries into element input values • Configuring compensation, benefit, and accrual plan rules • Calculating periodic values for gross earnings and defining element skip rules for the Calculate Gross Earnings process (provided with Global Payroll Interface)
Manage Balance Definitions	If you're using Global Payroll Interface, creating earnings elements creates balances automatically. You can edit these generated balance definitions. If you're using the Calculate Gross Earnings process, you may want to create additional balances for extracts or reporting.
Manage Object Groups	You can create object groups to specify subsets of elements or payroll relationships to include in a report or process, such as the Calculate Gross Earnings process.

Related Topics

- Using Formulas: Explained
- Payroll Definitions: Explained
- Payroll Balance Definitions: Explained
- Implementing Payroll Interface: Procedure

Elements: How They Hold Payroll Information for Multiple Features

Elements are building blocks that help determine the payment of base pay, benefits, absences, and other earnings and deductions. You associate your elements with salary bases, absence plans, and the benefits object hierarchy to determine how you'll use the elements.

This table provides some examples of how you can use elements.

Element Usage	Examples of Elements
Base Pay Management	Annual Salary Basis Monthly Salary Basis Hourly Salary Basis
Absence Management	Absence Payment Leave Liability Discretionary Disbursement Final Disbursement

Element Usage	Examples of Elements
Benefits	Health Care Deduction Savings Plan Deduction Employee Stock Purchase Deduction
Time and Labor	Regular Hourly Earnings Overtime Earnings Shift Earnings
Payroll	Regular Standard Earnings Bonus Earnings Tax Deduction Involuntary Deduction

Base Pay Management

To manage base pay, you attach a single earnings element to each salary basis to hold base pay earnings, and assign a salary basis to each worker. When a manager or compensation specialist enters a base pay amount for a worker, the application writes the amount to an element entry using the element input value associated with the worker's salary basis. Payroll processing uses the element entry to generate payment amounts.

Absence Management

You can manage worker absences and corresponding entitlements. You can create absence types based on predefined absence patterns, and associate them with absence plans. You can associate an absence element with an absence plan to transfer the following information for payroll processing:

- Payments for absent time during maternity or long term sickness
- Disbursement of partial time accruals
- Accrual disbursement when plan enrollment ends
- Absence liability amounts

You can process the payments in Oracle Fusion Global Payroll or use HCM extracts to transfer the information to a third-party payroll application for processing.

Benefits

Attach elements at various levels in the benefits object hierarchy to create deductions and earnings that you can process in a payroll run to calculate net pay.

Time and Labor

Create elements for use in time cards, and calculate payroll or gross earnings based on the time card entries transferred to payroll. You transfer the element input values to your time provider. For example, for Oracle Fusion Time and Labor, you run processes which create dependent payroll attributes and time card fields for element input values. You can automate the routine import of time card entries to payroll using predefined flows.

Payroll

For Oracle Fusion Global Payroll, you define earnings and deduction elements, such as bonus and overtime earnings and involuntary deductions. These elements incorporate all the components required for payroll processing, including formulas, balances, and formula result rules.

Related Topics

- Creating Payroll Elements for Payroll Interface: Worked Example
- Creating Earnings Elements for Payroll: Worked Example
- Creating Elements for Time Card Entries: Procedure

Creating Payroll Elements for Processing Absences: Procedure

You create elements to calculate and process absence payments in Oracle. When you create an absence element, your responses to the element template questions determine which elements, balances, formulas, and calculation components the template generates.

Defining an absence element involves the following steps:

- Creating an absence element
- Completing absence detail questions
- Completing accrual liability and balance payment questions
- Completing absence payment questions
- Submitting the element
- Creating element eligibility records and cost distributions

Creating an Absence Element

Create an absence element, selecting a primary classification of Absence, and a secondary classification. Typically, the predefined values include vacation, maternity, sickness, and other. Use the Manage Elements task in the Payroll Calculation or Setup and Maintenance work areas.

Completing Absence Detail Questions

The questions you complete in the Absence Details section determine which subsequent questions the template displays. You enter the following information in the Absence Details section:

1. Select the absence information to transfer to payroll based on the type of absence management plan.

Absence Management Plan Type	Absence Information to Transfer
Accrual	Accrual Balances
Accrual	Accrual Balances and Absences
Qualification	Qualification Absences
No Entitlement	No Entitlement Absences

2. Specify the calculation units to use when reporting the absence, for example that is shown on the payslip, and statement of earnings. Typically, you select units for your reports that correspond to the units for your absence plan. If you select different units, the application uses 8 hours to convert days to hours.

Completing Accrual Liability and Balance Payment Questions

If you transfer accrual balances, complete the questions shown in the following table.

Question	Steps
Calculate absence liability?	1. Select Yes, if you calculate liability. 2. Select a liability rate. Usually the rate is the same as the absence payment rate. You might select a different rate when estimating liability for billing purposes.
Does this plan enable balance payments when enrollment ends?	1. Select Yes to create a final disbursement element and to maintain balances for the disbursement hours and payments. 2. Optionally, select a rate to use for the calculation.
Does this plan enable partial payment of balance?	1. Select Yes to create a discretionary disbursement element and to maintain balances for disbursement hours and payments. 2. Optionally, select a rate to use for the calculation.

Completing Absence Payment Questions

Complete the following questions:

1. Select a method to reduce regular earnings if employees don't complete a time card, or the time card entries aren't used as a basis for calculating pay:

    - Reduce regular earnings by absence payment (entitlement payment balance)
    - Select rate to determine absence deduction amount (entitlement deduction balance)

You might select this method when the amount to deduct isn't 100 percent of the person's regular salary.

If you have standard earnings and absence elements in the same payroll run that reduce regular earnings, the payroll calculation reduces earnings in this sequence:

a. Using absence element entries
b. Using any standard earnings elements that reduce regular earnings

The salary balance isn't reduced beyond zero.

2. Optionally, select a rate to calculate the absence payment.

Submitting the Element

When you submit the element, the template automatically creates a base and retroactive pay element, balances, formulas, and calculation components. For some countries the template creates related elements, such as results and calculator elements.

The template also creates additional elements, depending on the options selected in the template to transfer absence information, as shown in the following table.

Type of Absence Information to Transfer	Optional Balance Payments Selected	Additional Elements Created
Accrual Balances	• Discretionary Disbursements • Final Disbursements	• Accrual • Discretionary Disbursement • Final Disbursement
Accrual Balances and Absences	• Discretionary Disbursements • Final Disbursements	• Accrual • Entitlement • Discretionary Disbursement • Final Disbursement
Qualification Absences	none	Entitlement
No Entitlement Absences	none	Entitlement

Creating Element Eligibility Records and Cost Distributions

Create element eligibility records for all the elements generated by the template, for example for your accrual, entitlement, discretionary and final disbursement elements.

If your enterprise calculates cost distributions, specify costing for all the element eligibility records. For example, for an accrual element, you do the following steps

1. Create element eligibility records for the accrual, accrual results, accrual retroactive, and accrual retroactive results elements.
2. Specify costing for the accrual results and retroactive results elements.

The costing process would cost the change in the liability balance since the last payroll period, debit the expense account and credit the liability account.

Related Topics

- Costing of Elements: Critical Choices
- Importing Absence Entries to Payroll: Procedure
- Rates Used to Calculate Absences in Payroll: Explained

Creating Payroll Elements for an Absence Accrual Plan: Worked Example

This example shows how to create an absence element for a vacation accrual absence plan. Based on your setup decisions, this procedure creates the following additional elements:

- Accrual element to process absence liability amounts
- Entitlement element to process payments for absence during vacation
- Discretionary Disbursement element to process disbursement of partial time accruals
- Final Disbursement element to process accrual disbursement when the absence plan enrollment ends

The name of the element is prefixed to each additional element.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
What type of an absence are you transferring to payroll?	Accrual balances
Who is eligible to receive this element?	All workers
What units do you want to use for reporting calculations?	Days
Do you want the element to calculate absence liability?	Yes
Which rate should the calculate absence liability use?	Liability Rate
Does your absence plan enable balance payments when enrollment ends?	Yes
Which rate should the final disbursement payment use?	Final Disbursement Rate
Does your absence plan enable payment of partial accrual balances?	Yes
Which rate should the partial disbursement payment use?	Partial Disbursement Rate

Decisions to Consider	In This Example
How do you want to calculate deductions for paid absences for employees not requiring a time card? • Reduce regular earnings by the amount of the absence payment so that the worker does not get paid twice? • Select a rate to determine the absence deduction amount?	Reduce regular earnings by absence payment

Prerequisites

Ensure that you created a rate definition to determine the monetary value of a unit of absence, and depending on your enterprise separate rates to calculate liability, discretionary disbursement, and final disbursement payments. You create a rate definition using the Manage Rate Definitions task in the Setup and Maintenance or Payroll Calculation work area.

Creating an Absence Element

1. In the Setup and Maintenance work area or the Payroll Calculation work area, use the **Manage Elements** task.
2. Click **Create**.
3. In the Create Element window, complete the fields as shown in this table.

Field	Value
Legislative Data Group	Select your legislative data group.
Primary Classification	Absences
Secondary Classification	Select an appropriate value for your legislation, such as Vacation.
Category	Absence

4. Click **Continue**.
5. On the Create Element: Basic Information page, complete the fields as shown in this table. Use default values for fields unless the steps specify other values.

   You can enter up to 50 characters for the element name. If you enter more than 50 characters, the application will automatically shorten the name.

Field	Value
Name	Vacation Payment
Reporting Name	Vacation Payment

6. In the Absence Plan Details section, complete the fields as shown in this table. Use default values for fields unless the steps specify other values.

Field	Value
What type of absence information do you want transferred to payroll?	Accrual Balances and Absences
What calculation units are used for reporting?	Days

7. Click **Next**.
8. On the Create Elements: Additional Details page, in the Accrual Liability and Balance Payments section, complete the fields as shown in this table. Use default values for fields unless the steps specify other values.

Field	Value
Calculate absence liability?	Yes.
Which rate should the liability balance calculation use?	Liability rate.
Does this plan enable balance payments when enrollment ends?	Yes
Which rate should the final balance payment calculation use?	Final disbursement rate.
Does this plan enable partial payments of absences?	Yes
Which rate should the discretionary disbursement use?	Discretionary disbursement rate.

9. On the Create Elements: Additional Details page, in the Absence Payments section, complete the fields as shown in this table. Use default values for fields unless the steps specify other values.

Field	Value
How do you want to reduce earnings for employees not requiring a time card?	Reduce regular earnings by absence payment..
Which rate should the absence payment calculation use?	Absence payment.

10. Click **Next**.
11. On the Create Element: Review page, review the information that you entered so far.
12. Click **Submit** to open the Element Summary page.

The template generates all the related elements, balances, and formulas.

Creating Element Eligibility

1. In the Element Overview section of the Element Summary page, click the **Element Eligibility** node.
2. Click **Create Element Eligibility** from the Actions menu.
3. In the Element Eligibility section, enter Vacation Payment Open in the **Element Eligibility Name** text box. Leave the rest of the fields on the page blank.
4. Click **Submit**.
5. Click **Done**.
6. In the Manage Elements page, search for the other elements prefixed with your absence element name.
7. Select each element in turn and repeat the steps on the Element Summary page to create eligibility for each element.

7 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.

8 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

9 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.

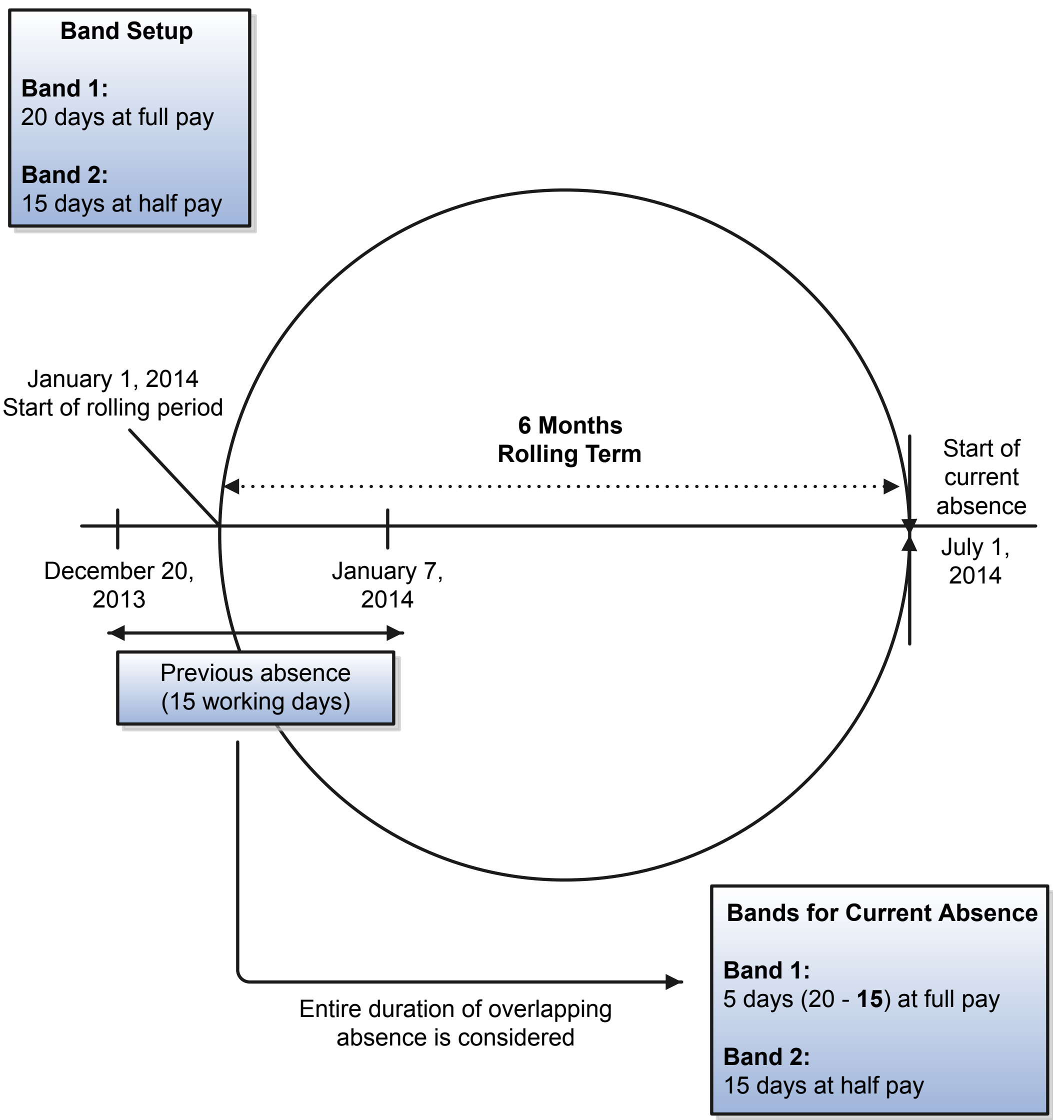
Scenario: You defined a six-month rolling-backward term in your qualification plan and set up bands that entitle workers to 20 days absence at full pay and a further 15 days at half pay.

- 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.



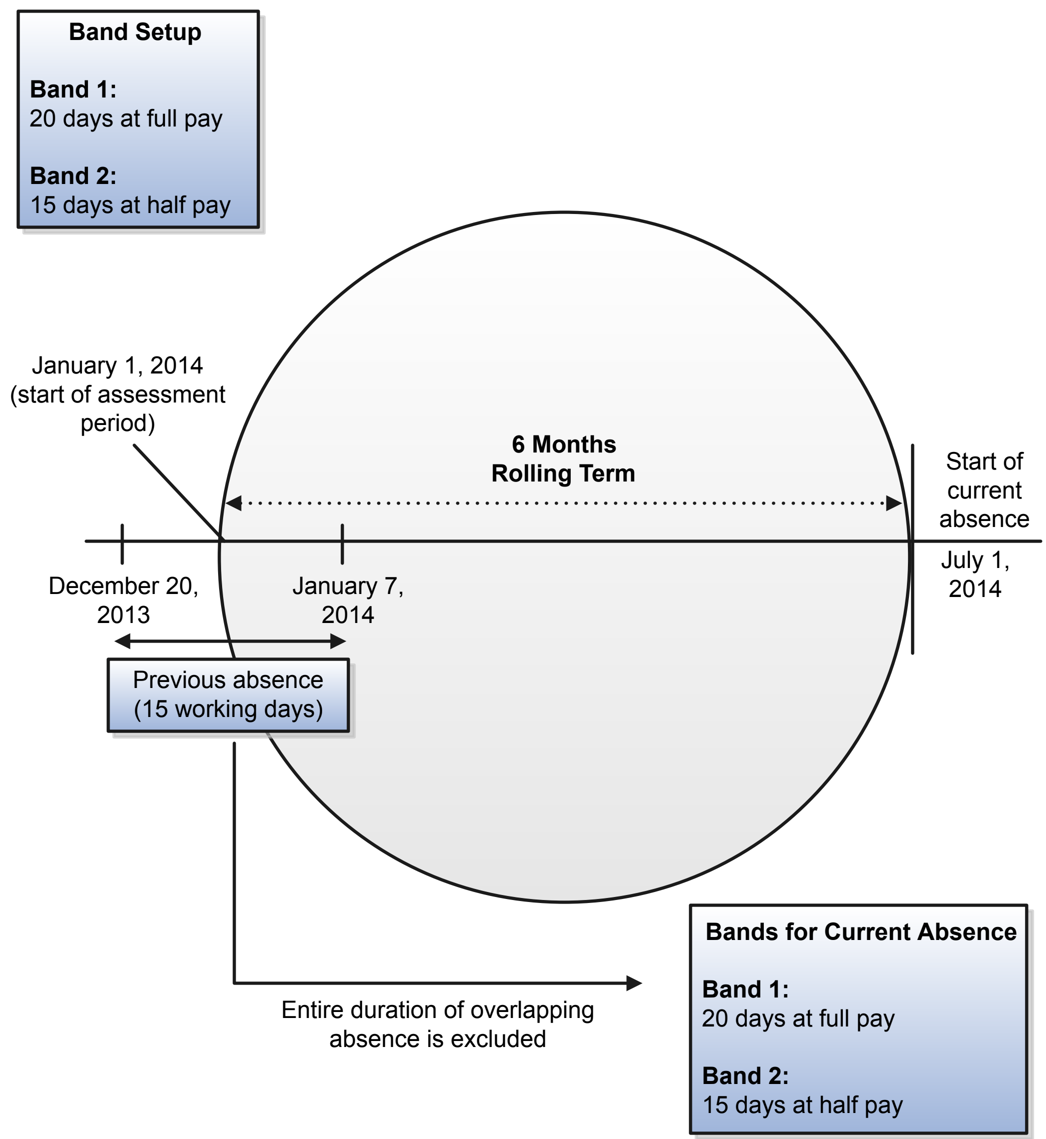
The Exclude Rule

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.

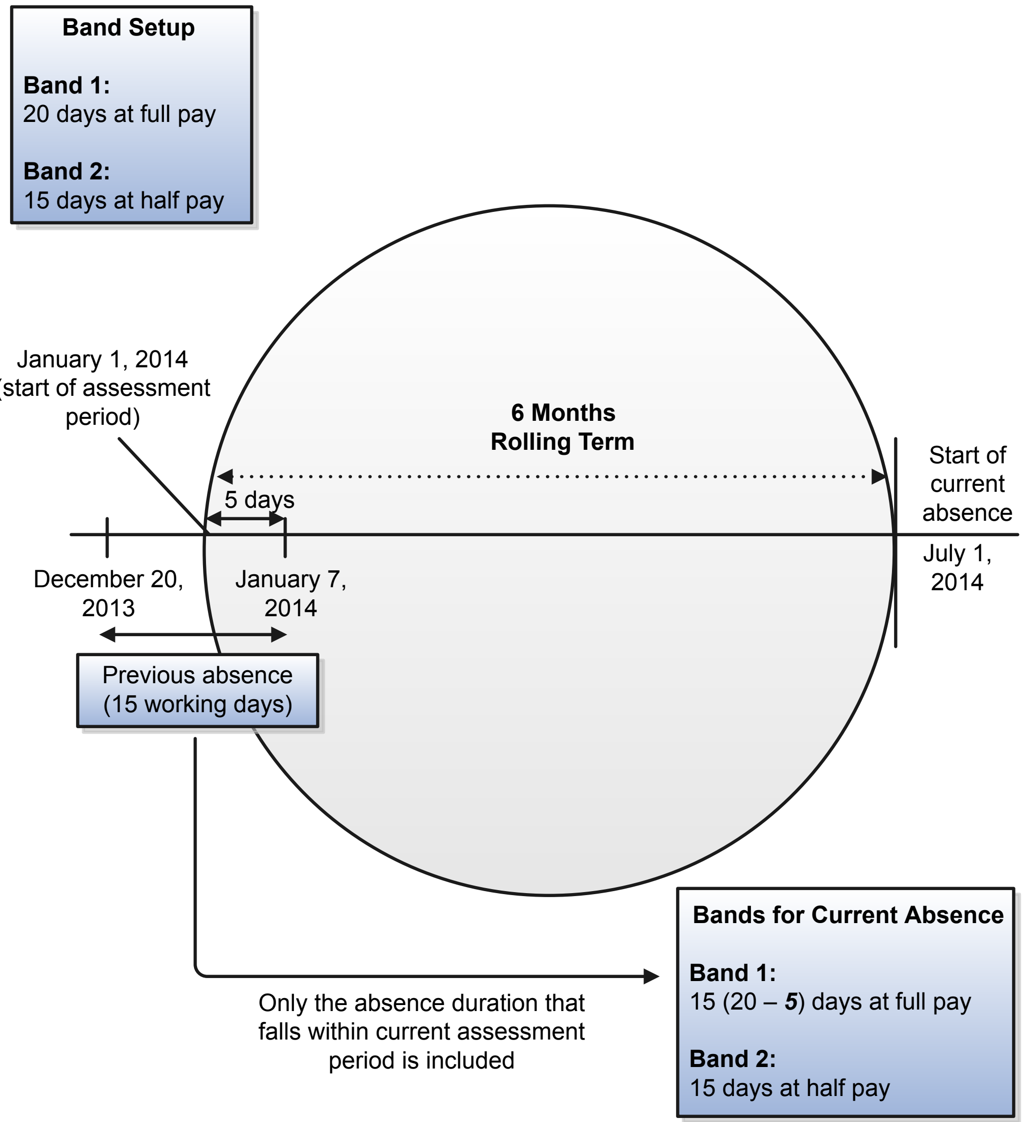
The following figure shows the usage of the Exclude rule in this scenario.



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

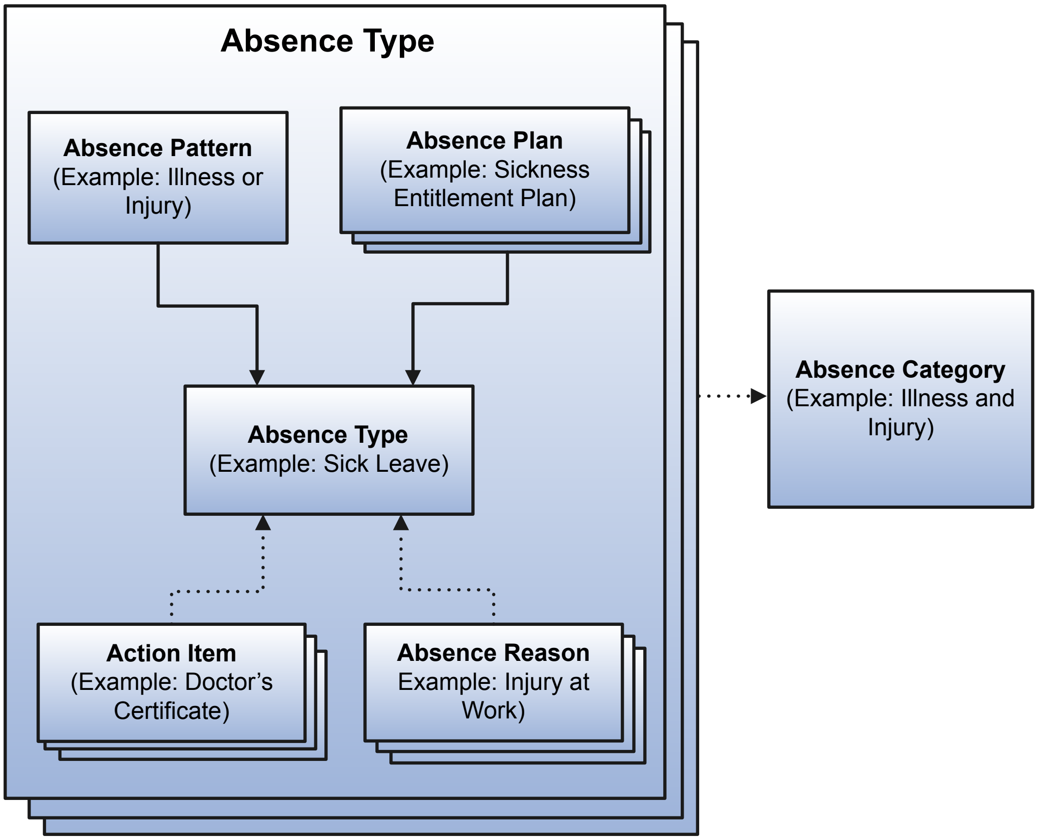
10 Absence Types, Reasons, and Categories

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.

11 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**.

12 Absence Processes

Schedule and Monitor Absence Processes: Overview

Use the Schedule and Monitor Absence Processes task in the Absence Administration work area to run the following absence processes:

Process Name	Purpose	When is the Process Run
Evaluate Absences	Calculates entitlements for unprocessed absences based on absence plan rules	Automatically, when a worker submits an absence. To defer the process, select the rule **Deferred processing on initial entry** in the Display Features tab of the Create Absence Type page.
Evaluate Certification Updates	Checks whether certification requirements for multiple workers are past their due dates	Administrators typically run this process daily to check if certifications are overdue. You run this process only if you use certifications with due dates.
Update Accrual Plan Enrollments	Updates enrollments based on the new hire and transfer events for multiple workers	Administrators typically run this process daily to determine plan eligibility for multiple workers.
Calculate Accruals and Balances	Calculates the accrual balances for multiple workers under an accrual absence plan	Administrators typically run this process at regular intervals. You can also run the process for individual enrollments.

Evaluate Absences Process: Explained

Calculate entitlements for unprocessed absences using the Evaluate Absences process in the Absence Administration work area. This process:

- Evaluates absences marked for deferred processing
- Reevaluates absences that meet the process parameters

This process runs automatically when you submit an absence. To defer the process, select the rule **Deferred processing on initial entry** in the Display Features tab of the Create Absence Type page.

Process Parameters

Select one of the following parameters to control which person records are included when you run this process:

Parameter	Description
Effective Date	Evaluates and updates absence records that are effective on the specified date. This is a required field.
Person	Limits processing to the selected worker. When you select a person record, the **Scheduled Absences** field appears.
Business Unit	Limits processing to workers in the selected business unit
Legal Employer	Limits processing to workers assigned to the selected legal employer
Person Selection Rule	Limits processing to specific workers that you include in the person selection rule. You can use the Person Selection formula type to include specific workers who meet special requirements for the absences batch process. You define the formula using the Manage Fast Formulas task and select that formula from the **Person Selection Rule** field.
Scheduled Absences	Limits processing to a particular future scheduled absence for a selected worker. This field appears only when you select a value in the **Person** field.

Related Topics

- Managing Scheduled Processes That You Submitted: Points to Consider
- Scheduled Process Statuses: Explained

Evaluate Certification Updates Process: Explained

Check whether certification requirements for multiple workers are past their due dates using the Evaluate Certification Updates process in the Absence Administration work area. This process:

- Evaluates certification due dates
- Updates absence records and entitlements when due date is passed

Administrators typically run this process daily to check if certifications are overdue. You run this process only if you use certifications with due dates.

You use this process when you define the **On passage of due date** fields in the Actions section of the Create Absence Certifications page. Then, you associate the defined certification requirements with the absence type using the Action Items tab on the Create Absence Types page.

Example: You want to change the worker's entitlement to half pay as of the absence start date when a certification requirement passes its due date. When the worker completes the requirement, you can recalculate the entitlements from the absence start date or the completion date.

Process Parameters

Select one of the following parameters to control which person records are included when you run this process:

Parameter	Description
Effective Date	Evaluates and updates certification requirements that are effective on the specified date. This is a required field.
Person	Limits processing to the selected worker
Business Unit	Limits processing to workers in the selected business unit
Legal Employer	Limits processing to workers assigned to the selected legal employer
Person Selection Rule	Limits processing to specific workers that you include in the person selection rule. You can use the Person Selection formula type to include specific workers who meet special requirements for the absences batch process. You define the formula using the Manage Fast Formulas task and select that formula from the **Person Selection Rule** field.

Related Topics

- Managing Scheduled Processes That You Submitted: Points to Consider
- Scheduled Process Statuses: Explained

Update Accrual Plan Enrollments Process: Explained

Update enrollments such as new hire, termination, and transfer events for multiple workers using the Update Accrual Plan Enrollments process in the Absence Administration work area. This process:

- Determines a worker's plan eligibility
- Enrolls a worker in an accrual plan, if eligible
- Terminates the enrollment, if the worker is no longer eligible for the plan

Administrators typically run this process daily to determine plan eligibility for multiple workers.

Process Parameters

Select one of the following parameters to control which person records are included when you run this process:

Parameter	Description
Effective Date	Evaluates and updates plan enrollments that are effective on the specified date
Person	Limits processing to a selected worker
Business Unit	Limits processing to workers in a selected business unit
Legal Employer	Limits processing to workers assigned to a selected legal employer

Parameter	Description
Person Selection Rule	Limits processing to specific workers that you include in a person selection rule. You can use the Person Selection formula type to include specific workers who meet special requirements for the absences batch process. You define the formula using the Manage Fast Formulas task and select that formula from the **Person Selection Rule** field.
Absence Plan	Limits processing to enrollments for only the selected accrual plan If you don't select an absence plan, you must select at least one of the following parameters: • Person • Business Unit • Legal Employer • Person Selection Rule The process updates accrual plan enrollments for each worker selected by the other parameters.

Related Topics

- Managing Scheduled Processes That You Submitted: Points to Consider
- Scheduled Process Statuses: Explained

Calculate Accruals and Balances Process: Explained

Generate accrual details and calculate balances for multiple workers using the Calculate Accruals and Balances process in the Absence Administration work area. This process:

- Calculates the accrual balance for each active enrollment
- Updates plan balances
- Transfers the information to Oracle Fusion Global Payroll, if you have selected the **Transfer absence payment information for payroll processing** option on the Create Absence Plans page

Administrators typically run this process at regular intervals. You can also run the process for individual enrollments.

Process Parameters

Select one of the following parameters to control which person records are included when you run this process:

Parameter	Description
Effective Date	Calculates the accrual balance for only those plans that are effective on the specified date This is a required field. You can select a future date or a past date as the effective date. To run the process using the effective date, a plan enrollment must exist for the worker on the effective date. If you don't select an absence plan, the process calculates the accrual balance for multiple plans with differing accrual periods on the effective date. If you select an absence plan, the process calculates the accrual balance for the accrual period of the selected plan on the effective date.

<table>
<tr><th>Parameter</th><th>Description</th></tr>
<tr><td>Person</td><td>Limits processing to the selected worker

If you select a person but not an absence plan, the process calculates the accrual balance for all plans in which the worker has an active enrollment.

If you select a person and an absence plan, the process calculates the accrual balance for only the selected plan, if the worker has an active enrollment for that plan.</td></tr>
<tr><td>Business Unit</td><td>Limits processing to workers in the selected business unit</td></tr>
<tr><td>Legal Employer</td><td>Limits processing to workers assigned to the selected legal employer</td></tr>
<tr><td>Person Selection Rule</td><td>Limits processing to specific workers that you include in the person selection rule. You can use the Person Selection formula type to include specific workers who meet special requirements for the absences batch process. You define the formula using the Manage Fast Formulas task and select that formula from the Person Selection Rule field.</td></tr>
<tr><td>Payroll</td><td>Limits processing to workers assigned to the selected payroll</td></tr>
<tr><td>Payroll Relationship Group</td><td>Limits processing to workers with payroll employment records included in the selected group

Define payroll relationship groups to run the process for a group of people within a payroll or a group of people in multiple payrolls.</td></tr>
<tr><td>Changes Since Last Run</td><td>Limits processing to workers with either payroll or assignment updates or corrections since the last process run

If you select:
Payroll events since last run: The process calculates the accrual balance for workers whose payroll records have changed since the last scheduled run.
Example: A worker schedules five days absence on January 25 and you run the process on January 26. Due to an emergency, the worker returns to work on January 29, after an absence of four days. The worker updates the absence record to reflect an absence of four days instead of five. If you schedule the process again on February 1 and select Payroll events since last run, it generates the updated accrual balance for the worker.
HR Assignment changes since last run: The process calculates the accrual balance for workers whose assignment record last updated date is later than the last scheduled run.
Example: The last scheduled run was on January 1 and you update a worker's assignment on January 2. If you schedule the process again on January 3 and select HR Assignment changes since last run, it generates the updated accrual balance for the worker.</td></tr>
<tr><td>Legislative Data Group</td><td>Limits processing to a group of one or more absence types that are associated with the legislative group that you select</td></tr>
<tr><td>Absence Plan</td><td>Limits processing to calculating accrual balances for only the selected accrual plan. When you select this field, the Repeating Period field appears.

If you don't select an absence plan, you must select at least one of the following parameters:
Legislation
Business Unit</td></tr>
</table>

Parameter	Description
	• Legal Employer • Person Selection Rule • Person • Payroll • Payroll Relationship Group • Changes Only The process calculates accrual balances for each worker selected by the other parameters.
Repeating Period	Limits processing to the selected accrual period for the selected plan. This field appears only when you select a value in the **Absence Plan** field.

Related Topics

- Managing Scheduled Processes That You Submitted: Points to Consider
- Scheduled Process Statuses: Explained

Withdraw Accruals and Balances Process: Explained

You can use the Withdraw Accruals and Balances process to withdraw and update worker accrual balance and delete enrollments. Use the Schedule and Monitor Absence Processes task in the Absence Administration work area to run this process. You typically run this process to correct existing accrual data. You can also run the process for individual enrollments.

Process Parameters

Configure any of the following process parameters to control which person records are included when you run this process:

Parameter	Description
Effective Date	Withdraws the accrual balance for only those plans that are effective on the specified date This is a required field. You can select a future date or a past date as the effective date.
Processing Option	Limits processing to the following processing options: • Withdraw accruals and balances • Enrollment deletion
Person	Limits processing to the selected worker
Legal Employer	Limits processing to workers assigned to the selected legal employer
Person Selection Rule	Limits processing to specific workers that you include in the person selection rule You can use the Person Selection formula type to include specific workers who meet special requirements for the absences batch process. You define the formula using the Manage Fast Formulas task and select that formula from the Person Selection Rule field.

Parameter	Description
Payroll	Limits processing to workers assigned to the selected payroll
Payroll Relationship Group	Limits processing to workers with payroll employment records included in the selected group Define payroll relationship groups to run the process for a group of people within a payroll or a group of people in multiple payrolls.
Legislative Data Group	Processes only those absence types that are associated with the legislative data group you select
Absence Plan	Withdraws accrual balance for only the selected accrual plan

13 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.

14 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

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.

assignment statement

A statement that formulas use to set a value for a local variable.

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.

calendar event

A period that signifies an event, such as a public holiday or a training course, that impacts worker availability.

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.

descriptive flexfield

Customizable expansion space, such as fields used to capture additional descriptive information or attributes about an entity, such as a customer case. You may configure information collection and storage based on the context.

determinant

A value that specifies the use of a reference data set in a particular business context.

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.

element

Component in the calculation of a person's pay. An element may represent a compensation or benefit type, such as salary, wages, stock purchase plans, pension contributions, and medical insurance.

element classification

Provides various element controls, such as the processing order, balances feeds, costing, and taxation. Oracle predefines primary element classifications and some secondary classifications. You can create other secondary classifications.

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.

enterprise

An organization with one or more legal entities under common control.

extensible flexfield

Customizable expansion space used to capture multiple sets of information within a context or multiple contexts. Some extensible flexfields let you group contexts into categories.

fast formula

A simple way to write formulas using English words and basic mathematical functions. Formulas are generic expressions of calculations or comparisons that repeat with different input values.

flexfield

A flexible data field that you can customize to contain one or more segments or store additional information. Each segment has a value and a meaning.

flexfield segment

An extensible data field that represents an attribute and captures a value corresponding to a predefined, single extension column in the database. A segment appears globally or based on a context of other captured information.

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.

key flexfield

Configurable flexfield comprising multiple parts or segments, each of which has a meaning either individually or in combination with other segments. Examples of key flexfields are part numbers, asset category, and accounts in the chart of accounts.

legislation

The base definition that governs certain rules so that Oracle Global Human Resources can perform differently for different countries and territories in order to meet statutory requirements. Can be predefined by Oracle or defined during implementation using the Manage Legislations for Human Resources task.

logical record

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

lookup code

An option available within a lookup type, such as the lookup code BLUE within the lookup type COLORS.

lookup type

The label for a static list that has lookup codes as its values.

offering

A comprehensive grouping of business functions, such as Sales or Product Management, that is delivered as a unit to support one or more business processes.

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.

payroll relationship

Defines an association between a person and a payroll statutory unit based on payroll calculation and reporting requirements.

personal payment method

Method of payment to a person for a particular payroll. When an administrator assigns a person to a new payroll, payments are made using the default organization payment method for the new payroll until a personal payment method exists.

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.

primary work schedule

Schedule that the application uses to determine the worker's availability.

profile option

User preferences and system configuration options that users can configure to control application behavior at different levels of an enterprise.

qualification absence plan

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

reference data set

Contains reference data that can be shared across a number of business units or other determinant types. A set supports common administration of that reference data.

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.

salary basis

Characterizes worker's base pay. Identifies payroll details used to pay base earnings, period of time pay is quoted, factor used to annualize base pay, components used to itemize adjustments into different reasons, and grade rate used for salary validation.

set enabled

A property that describes entities that an organization shares as reference data. For example, you can indicate a lookup, customer, location, or document attachment as set enabled.

user-defined criteria

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

value set

A set of valid values against which values entered by an end user are validated. The set may be tree structured (hierarchical).

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.

work schedule exception

An event that impacts the normal working pattern in a work schedule.