Overview

Introduction
One of the enhancements of FY14 – FY15 Budget cycle is the "Mass Extend Appointment End Date Business Rule". Units can run this business rule for their Dept IDs to mass extend the appointment end date of employees.

Overview of Business Rule
Mass Extend Appointment End Date Business Rule does the following:
- After users select an appointment end date filter, the business rule brings a list of employees to a data form.
- Users change the Apply Appointment Extension flag to Yes, if they want to extend the appointment end date of the employee.
- Final step for users is to enter the new appointment end date. Once the date is updated, the business rule extends the appointment end date, status, fte and distribution end date of the employee and calculates the salary.

Access
Users who have **Planner (write) access to CalPlan and HCP** will be able to run this business rule

Instructions
See the following pages for detailed instructions on how to use this business rule

Questions
If you have any questions regarding this document, please email calplanning@berkeley.edu.

Instructions: Mass Extend Appointment End Date

To extend the appointment end date of employees, follow the steps below:

1. Navigate to the Mass Extend Appointment End Date task list, which is located under HCP Planner Task List > **Mass Extend Appointment End Date**.
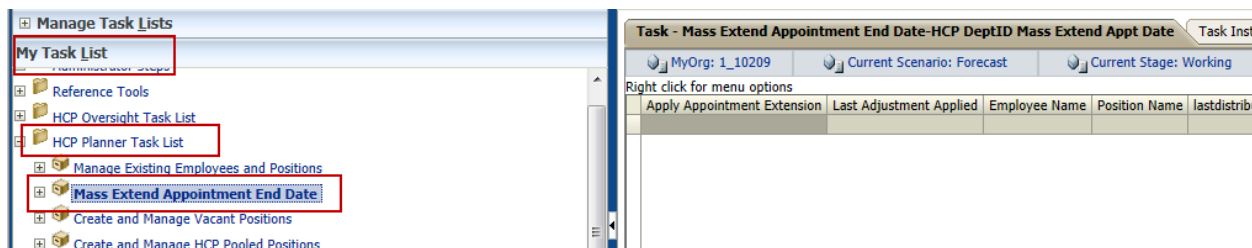
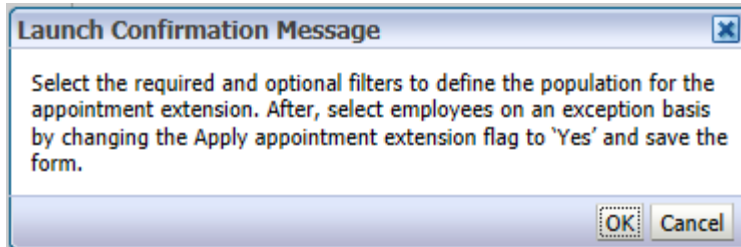2. Right click on the form and you will notice three options:
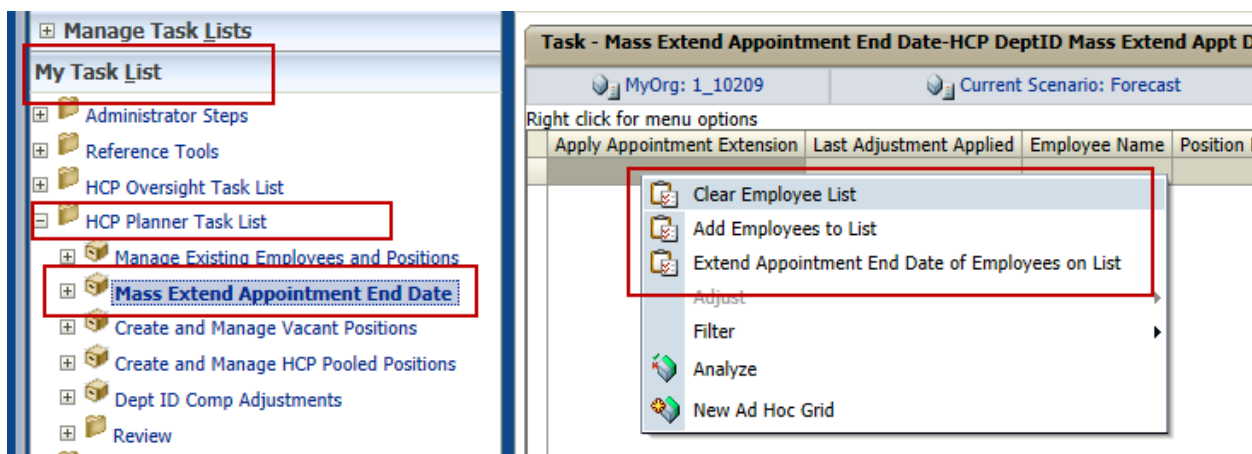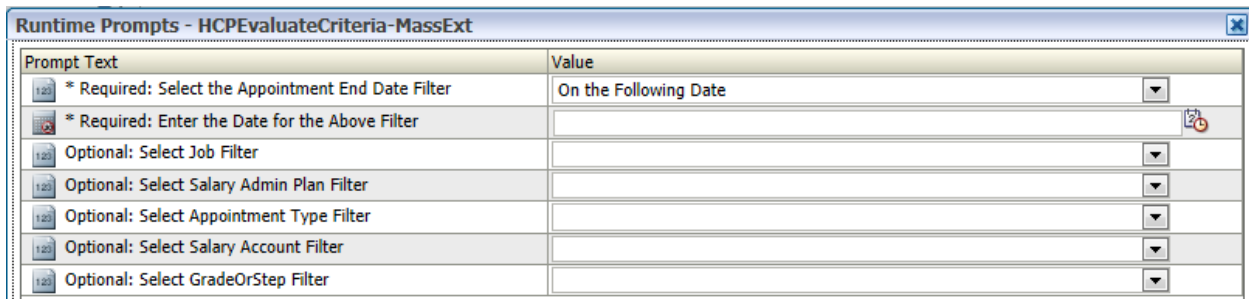

   a. **Clear Employee List:** Click on this menu item when you need to start from over to mass extend appointment end dates. Clicking on this menu item will **remove** the employees from the form.
   b. **Add Employees to List:** When you click on this menu item, you will receive a reminder that will guide you through the steps to add an employee to a list.
   c. **Extend Appointment End Date of Employees on List**: Final step in the Mass Extend Appointment End Date exercise is to set an extension date and run the business rule.

Clear Employee List

1. Click on this menu item when you need to start from over to mass extend appointment end dates.
2. Clicking on this menu item will **remove** the employees from the form.
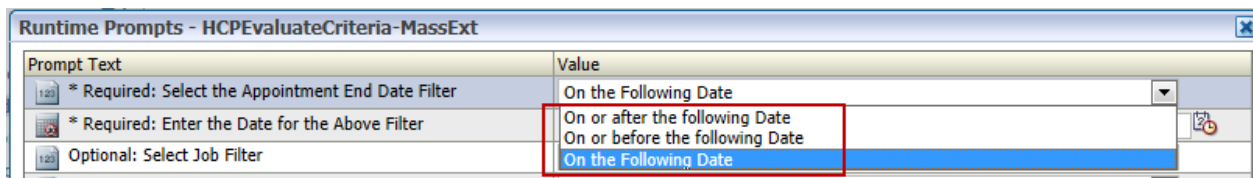
Add Employees to List

1. When you click on this menu item, you will receive a reminder:

    Launch Confirmation Message ☒

    Select the required and optional filters to define the population for the appointment extension. After, select employees on an exception basis by changing the Apply appointment extension flag to 'Yes' and save the form.

    [OK] [Cancel]

2. Click OK and a new window will pop-up:

Runtime Prompts - HCPEvaluateCriteria-MassExt ☒	
Prompt Text	Value
🔢 * Required: Select the Appointment End Date Filter	On the Following Date ▾
📅 * Required: Enter the Date for the Above Filter	📅
🔢 Optional: Select Job Filter	▾
🔢 Optional: Select Salary Admin Plan Filter	▾
🔢 Optional: Select Appointment Type Filter	▾
🔢 Optional: Select Salary Account Filter	▾
🔢 Optional: Select GradeOrStep Filter	▾

3. There are 7 fields in this business rule, but only **two** of them are **required** for you to fill out. The first field is the criteria to bring the list of employees to the Appointment End Date Mass Update form. There are 3 options:

 | Runtime Prompts - HCPEvaluateCriteria-MassExt ☒ | |
    | --- | --- |
    | Prompt Text | Value |
    | 🔢 * Required: Select the Appointment End Date Filter | On the Following Date ▾ |
    | 📅 * Required: Enter the Date for the Above Filter | On or after the following Date |
    | | On or before the following Date |
    | 🔢 Optional: Select Job Filter | On the Following Date |

    - **On or after the following Date**
    - **On or before the following Date**
    - **On the following Date**

4. If you know that for a certain Dept ID, all the employee's appointment end dates are the same date, such as 12/31/2013, then use **Option 3: On the following Date**.

5. If the employee's appointment end dates are spread out, then use **Option 1: On or after the following Date** or **Option 2: On or before the following Date.**

Examples of how to filter:

Example 1

My Dept ID has 100 employees. If 30 of them have an appointment end date of 1/31/2014 and I want to extend the appointment end date of these 30 employees to 6/30/2015, then I would fill out the two required fields as follows:

Runtime Prompts - HCPEvaluateCriteria-MassExt	
Prompt Text	**Value**
123 * Required: Select the Appointment End Date Filter	On the Following Date
🗓 * Required: Enter the Date for the Above Filter	01/31/2014

Example 2

There is a Dept ID with 70 employees. Out of 70 employees, 25 of them have an appointment end date spread from 9/30/2013 to 4/30/2014. I want to extend the appointment end date of these 25 employees to 5/31/2014. To do this I would fill out the two required fields as follows:

Runtime Prompts - HCPEvaluateCriteria-MassExt	
Prompt Text	**Value**
123 * Required: Select the Appointment End Date Filter	On or before the following Date
🗓 * Required: Enter the Date for the Above Filter	04/30/2014

6. Use the **optional fields** to filter the list of employees further. You can search by the following filters:

- Job
- Salary Admin Plan
- Appointment Type
- Salary Account
- Grade or Step

Runtime Prompts - HCPEvaluateCriteria-MassExt		☒
Prompt Text	**Value**	
123 * Required: Select the Appointment End Date Filter	On the Following Date	▼
🗓 * Required: Enter the Date for the Above Filter		🗓
123 Optional: Select Job Filter		▼
123 Optional: Select Salary Admin Plan Filter		▼
123 Optional: Select Appointment Type Filter		▼
123 Optional: Select Salary Account Filter		▼
123 Optional: Select GradeOrStep Filter		▼

7. Here is how the form looks like when you launch the **Add Employees to List** business rule:

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8. The Apply Appointment Extension flag defaults to **No**. If you would like to extend the appointment end date of the employee, you need to change this flag to **Yes** and **save** the form.
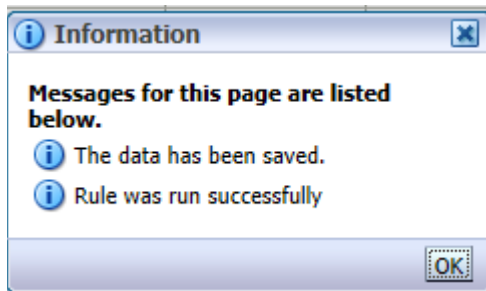
    Tip from Doctor Hyperion: Instead of changing the flag to Yes for each employee by clicking on the black arrow and selecting Yes, you can use also use keyboard shortcut **[Control+C]** to copy the cell and **[Control+V]** to paste it.

9. Yellow indicates that the form is not saved yet:

10. Click on the **save** button and the employees with **Yes** flag will turn white and you will get a confirmation message:

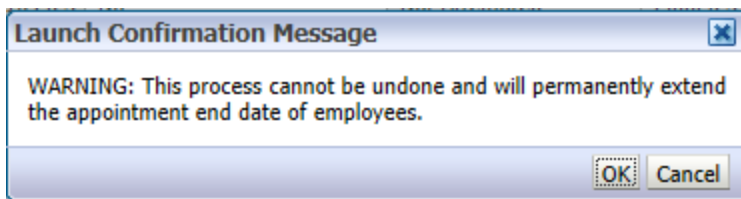
Extend Appointment End Date of Employees on List

The final step in the Mass Extend Appointment End Date exercise is to set an extension date and run the business rule.

1. Click on **Extend Appointment End Date of Employees** on List and you will get a warning message. **Click OK** to continue.

2. Enter the new Appointment End Date for the employees that are flagged **Yes** in the Appointment End Date Mass Update form.

3. The business rule runs about 1-2 minutes and you will get the following message when it is completed:
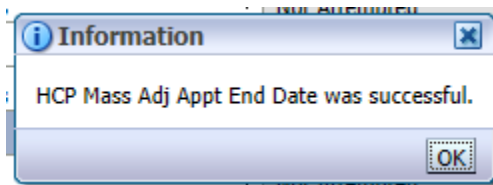

If the business rule runs more than 3 minutes, you will get a warning message: "Business Rule Set execution time has exceeded the maximum configured wait time. Business Rule Set will now be executed in the background. To check Business Rule Set execution status, open the Job Console page."
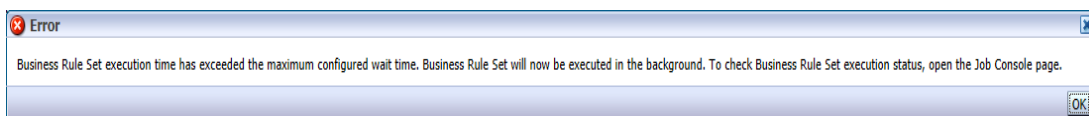
To go to the Job Console, click on Tools > Job Console

<mark>(There is an **Oracle bug**. You need to repeat this step **twice** to open the Job Console)</mark>
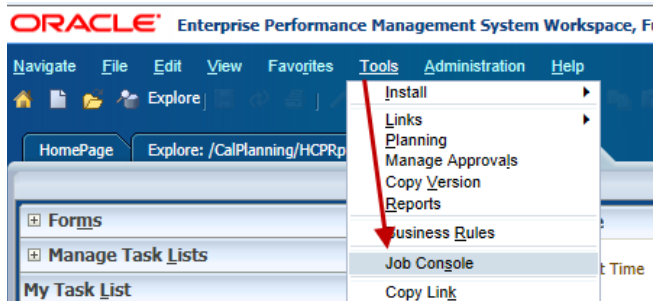
You will notice your business rule is still being processed:

Wait for couple of minutes and click on "Go" button to refresh the page:

Keep refreshing the job console till your business rule is completed.

Did it Work?

There are a couple of checks that can be done after the business rule is successfully run:

1. Check the expense of employees that got an extension and validate that their salaries are also extended.
2. Check the expense of employees that did not get an extension (the ones with the <u>**No**</u>) and validate that their salaries are not changed.