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 <u>calplanning@berkeley.edu</u>.



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.

⊞ Manage Task Lists			Task - Mass Extend App	pointr	ment End Date-HCP De	ptID Mas	s Exter	d Appt Date	Task Inst
My Task List			🕘 MyOrg: 1_10209	6	Current Scenario: Fore	cast	۵.	Current Stage: V	Vorking
🗄 🎾 Reference Tools	^	Ri	ight click for menu options						
HCP Oversight Task List			Apply Appointment Exter	nsion	Last Adjustment Applied	Employee	e Name	Position Name	lastdistribu
🗄 🟴 HCP Planner Task List									
Manage Existing Employees and Positions									
🗄 🞯 Mass Extend Appointment End Date									
표 💷 Create and Manage Vacant Positions	=								
🗉 🞯 Create and Manage HCP Pooled Positions	=								

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:



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

Prompt Text	Value						
* Required: Select the Appointment End Date Filter	On the Following Date	▼					
* Required: Enter the Date for the Above Filter		20					
122 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	20			
Dptional: 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						
* 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							
* Required: Select the Appointment End Date Filter	On or before the following Date							
* Required: Enter the Date for the Above Filter	04/30/2014							
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	Valu	ie				
* Required: Select the Appointment End Date Filter	On	the Following Date				
Required: Enter the Date for the Above Filter		¹ 26				
Dptional: Select Job Filter						
Optional: Select Salary Admin Plan Filter						
Optional: Select Appointment Type Filter						
Optional: Select Salary Account Filter						
Optional: Select GradeOrStep Filter						

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



Mass Extend Appointment End Date

My Task List	0	MyOrg: 1_1	.0474	i Current Scenario	o: Forecast
🕀 🏴 Administrator Steps			[Apply Appointment Extension	Last Adjustment Applied
E PReference Tools	1_10474	P00041929	E012577439	No	Not Attempted
🗄 阿 HCP Oversight Task List			E012575706	No	Not Attempted
🖃 🏴 HCP Planner Task List			E012576104	No	Not Attempted
			E012273467	No v	Not Attempted
Mass Extend Appointment End Date			E012576135	No 🔻	Not Attempted
Oreate and Manage Vacant Positions			E012576128	No	Not Attempted
 Oreate and Manage HCP Pooled Positions Opent ID Comp Adjustments 			E012576111	No	Not Attempted
			E012479112	No	Not Attempted
Calplan FY14 Forecast Task List			E012581607	No	Not Attempted
🗄 芦 Review Report Books			E012169423	No	Not Attempted
🗄 芦 Campus Budget Office Task List			E012575695	No 🔫	Not Attempted
			E012373955	No 🔻	Not Attempted

8. The Apply Appointment Extension flag defaults to <u>No</u>. If you would like to extend the appointment end date of the employee, you need to change this flag to <u>Yes</u> and <u>save</u> 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:

	Task - N	1ass Extend	Appointmer	nt End Date-HCP DeptID Ma
	9	MyOrg: 1_1	.0474	🕥 Current Scenario
				Apply Appointment Extension
	1_10474	P00041929	E012577439	No 🔫
			E012575706	Yes 🔻
			E012576104	No 🔻
			E012273467	Yes 🔻
			E012576135	No 🔻
			E012576128	No 🔻
			E012576111	Yes 🔻
			E012479112	No 🔻
			E012581607	Yes 🔻
			E012169423	No 🔻
			E012575695	No 🔻
(i) Inform	nation		

Messages for this page are listed below.	
 The data has been saved. Rule was run successfully 	
<u> </u>	
	OK

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.



	9	MyOrg: 1_1	0474	🕥 Current Scenario	: Forecast				
				Apply Appointment Extension	Last Adjustment Applied				
	1_10474	P00041929	E012577439	No 👻	Not Attempted				
			E012575706	Yes 🔻	Not Attempted				
			E012576104	No 🔻	Not Attempted				
			E012273467	Yes 🔻	Not Attempted				
			E012						
			E012 🕞 C	lear Employee List	-				
			E012 🔂 A	dd Employees to List	_				
			E012 🕞 E	extend Appointment End Date of	Employees on List				
			E012	dit					
1				· ·					
L	Launch Confirmation Message								
,	WARNING: This process cannot be undone and will permanently extend the appointment end date of employees.								
				OK Car	ncel				

2. Enter the new Appointment End Date for the employees that are flagged <u>Yes</u> in the Appointment End Date Mass Update form.

1	Runtime Prompts - HCP Mass Adj Appt End Date								
	Prompt Text			Value					
	* 1:Enter the new Appointment End Date			06/30/2015					

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."

😮 Error	×
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.	
	ОК



To go to the Job Console, click on Tools > Job Console

(There is an Oracle bug. You need to repeat this step twice to open the Job Console)

ORACLE: Enterprise Performance Management System Workspace, Fi						
Navigate File Edit View Favorites	Copy Version					
⊞ For <u>m</u> s	Reports usiness Rules					
🗄 Manage Task <u>L</u> ists	Job Console t Time					
My Task List	Copy Link					

You will notice your business rule is still being processed:

			,,	,,	
Ruleset	HCP Mass Adj Appt End Date	msevinc	11/15/2013 14:25	\rightarrow	Processing

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

Job Console								
<u>S</u> tart Time		20	End Time	20	<u>]</u> ob Туре	Select Job Type	v	
Stat <u>u</u> s	Select Run Status	•	Job <u>N</u> ame		User Name		→[•

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

Ruleset	HCP Mass Adj Appt End Date	msevinc	11/15/2013 14:25:56 PM	11/15/2013	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.