



Job Aid: TA23 Update absence plan enrollment and calculate the periodic accrual for all employees

Last Update: 04/25/2023



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## Document Version History

Date	Version	Comments
04/25/2023	1.0	Initial version

## Pre-Requisites/ Job Descriptions

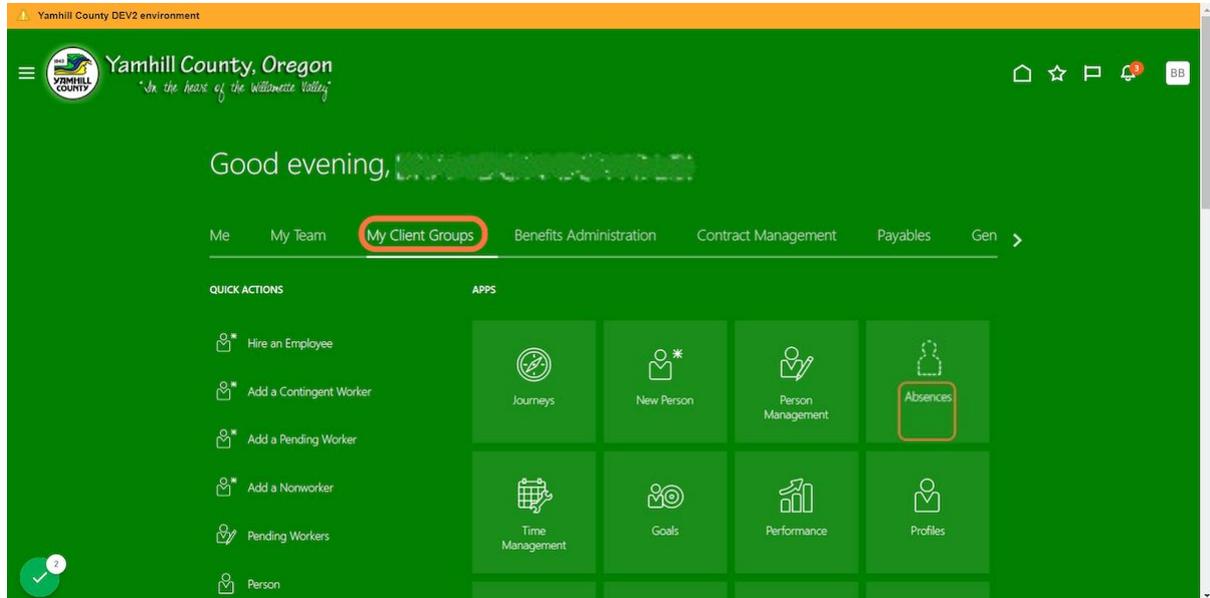
This job aid is applicable to the following Oracle Cloud job descriptions:

ID	Job Description
01	Time Administrator



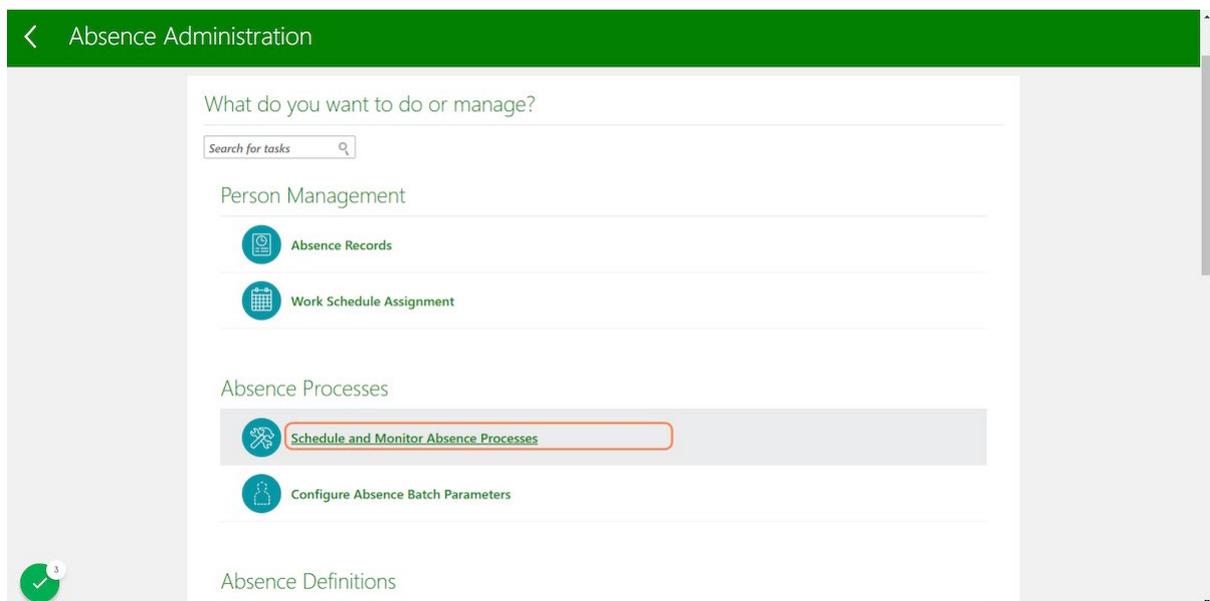
STEP 1

Login to Oracle Fusion Cloud. Click on the “Absences” tile, under the “My Client Groups” tab.



STEP 2

Click on the “Schedule and Monitor Absence Processes” option.



### STEP 3

Click the “Run” icon corresponding to the “Update Accrual Plan Enrollments” Batch Process.

Yamhill County DEV2 environment

Yamhill County, Oregon  
"In the heart of the Willamette Valley"

#### Schedule and Monitor Absence Processes

Submit Jobs

Batch Process Name	Job Description	Run
Process Events	Processes absence data in response to HCM events.	
Evaluate Absences	Calculates entitlements for unprocessed absences.	
Evaluate Certification Updates	Evaluates certification due dates and updates absence details when due date is passed.	
Update Accrual Plan Enrollments	Evaluates employee events for enrollment and termination into accrual plans.	
Calculate Accruals and Balances	Generate details and balances for accrual plans or compensatory time expirations for compensatory time plans.	
Migrate Previous Versions of Absence Data	Transfers data, such as absence types, absence categories, accrual plans, and employee absence records from earlier versions of absence management to ...	
Withdraw Accruals and Balances	Withdraws accrual details and balances for accrual plans.	
Generate Daily Breakdown of Absence Details	Generates a daily breakdown of absence details for reporting purposes.	

Supplemental Details

view  Flat List  Hierarchy

View  Status  Time Range

Process Name	Process ID	Status	Scheduled Time	View Output	Parameters	View Log
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### STEP 4

Click the calendar icon next to “Effective Date” and select the appropriate value.

This process will be queued up for submission at position 1

Process Options Advanced Submit Cancel

Name Update Accrual Plan Enrollments

Description Evaluates employee events for enrollment and te...

Schedule As soon as possible

Submission Notes  Notify me when this process ends

#### Basic Options

Parameters

\* Effective Date 03/28/2023

Run as test

Include trace statements

Increment effective date

#### Population Filters

Person

Business Unit

Legal Employer

Person Selection Rule

Absence Plan

Plan Category

Changes Since Last Run

Payroll



## STEP 5

Check the box “Increment effective date”.

Name Update Accrual Plan Enrollments  
Description Evaluates employee events for enrollment and te...  
Schedule As soon as possible

Notify me when this process ends  
Submission Notes

### Basic Options

Parameters

\* Effective Date 03/28/2023

Run as test  
 Include trace statements in audit log  
 Increment effective date

### Population Filters

Person  
Business Unit  
Legal Employer  
Person Selection Rule  
Absence Plan  
Plan Category  
Changes Since Last Run

## STEP 6

Click the dropdown next to “Absence Plan” and select the Absence Plan that you wish to update.

Process Options Advanced Submit Cancel

Name Update Accrual Plan Enrollments  
Description Evaluates employee events for enrollment and te...  
Schedule As soon as possible

Notify me when this process ends  
Submission Notes

### Basic Options

Parameters

\* Effective Date 03/28/2023

Run as test  
 Include trace statements in audit log  
 Increment effective date

### Population Filters

Person  
Business Unit  
Legal Employer  
Person Selection Rule  
Absence Plan  
Plan Category  
Changes Since Last Run  
Payroll  
Relative Data Group

Administrative Leave JS Legislative  
Bereavement Leave US Legislative  
Commissioners Day US Legislative  
Comp Time Earn US Legislative  
Donated Leave US Legislative  
FET US Legislative  
FMLA US Legislative  
Floating Holiday US Legislative  
Jury Duty US Legislative  
Leave Without Pay US Legislative



## STEP 7

Click on the “Submit” button towards the top-right of the screen.

The screenshot shows the 'Update Accrual Plan Enrollments' process configuration interface. At the top right, there are buttons for 'Process Options', 'Advanced', 'Submit', and 'Cancel'. The 'Submit' button is highlighted with a red box. Below the buttons, there are fields for 'Name', 'Description', 'Schedule', and 'Submission Notes'. The 'Basic Options' section includes 'Effective Date' (03/28/2023), 'Run as test', 'Include trace statements in audit log', and 'Increment effective date' (checked). The 'Population Filters' section includes dropdown menus for 'Person', 'Business Unit', 'Legal Employer', 'Person Selection Rule', and 'Absence Plan' (Administrative Leave).

## STEP 8

Click the “OK” button to acknowledge the confirmation message.

The screenshot shows the same 'Update Accrual Plan Enrollments' process configuration interface as in Step 7, but with a confirmation dialog box overlaid. The dialog box has a title bar 'Confirmation' and contains the text 'Process 1241903 was submitted.' and an 'OK' button. The background interface is dimmed.



## STEP 9

Wait a few minutes, and then click the “Refresh” icon to validate that the process completed successfully.

Submit Jobs

Batch Process Name	Job Description	Run
Process Events	Processes absence data in response to HCM events.	
Evaluate Absences	Calculates entitlements for unprocessed absences.	
Evaluate Certification Updates	Evaluates certification due dates and updates absence details when due date is passed.	
Update Accrual Plan Enrollments	Evaluates employee events for enrollment and termination into accrual plans.	
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Withdraw Accruals and Balances	Withdraws accrual details and balances for accrual plans.	
Generate Daily Breakdown of Absence Details	Generates a daily breakdown of absence details for reporting purposes.	

Supplemental Details

View  Flat List  Hierarchy

View  Status  Time Range

Process Name	Process ID	Status	Scheduled Time	View Output	Parameters	View Log
Update Accrual Plan Enrollments:...	1241907	Succeeded	03/28/2023 11:...		N, N, Y, 300000009889544, 1, 5, 59003, 2023-03-28	
Update Accrual Plan Enrollments:...	1241906	Succeeded	03/28/2023 11:...		N, N, Y, 300000009889544, 1, 4, 59003, 2023-03-28	
Update Accrual Plan Enrollments:...	1241905	Succeeded	03/28/2023 11:...		N, N, Y, 300000009889544, 1, 3, 59003, 2023-03-28	
Update Accrual Plan Enrollments:...	1241904	Succeeded	03/28/2023 11:...		N, N, Y, 300000009889544, 1, 2, 59003, 2023-03-28	
Update Accrual Plan Enrollments	1241903	Succeeded	03/28/2023 11:...		N, 2023-03-28, Y, 300000009889544, Administrative Leave	

## STEP 10

Run the “Calculate Accruals and Balances” process by clicking the “Run” icon at the far right on the corresponding line.

Submit Jobs

Batch Process Name	Job Description	Run
Process Events	Processes absence data in response to HCM events.	
Evaluate Absences	Calculates entitlements for unprocessed absences.	
Evaluate Certification Updates	Evaluates certification due dates and updates absence details when due date is passed.	
Update Accrual Plan Enrollments	Evaluates employee events for enrollment and termination into accrual plans.	
Calculate Accruals and Balances	Generate details and balances for accrual plans or compensatory time expirations for compensatory time plans.	
Migrate Previous Versions of Absence Data	Transfers data, such as absence types, absence categories, accrual plans, and employee absence records from earlier versions of absence management to ...	
Withdraw Accruals and Balances	Withdraws accrual details and balances for accrual plans.	
Generate Daily Breakdown of Absence Details	Generates a daily breakdown of absence details for reporting purposes.	

Supplemental Details

View  Flat List  Hierarchy

View  Status  Time Range

Process Name	Process ID	Status	Scheduled Time	View Output	Parameters	View Log
Update Accrual Plan Enrollments:...	1241907	Succeeded	03/28/2023 11:...		N, N, Y, 300000009889544, 1, 5, 59003, 2023-03-28	
Update Accrual Plan Enrollments:...	1241906	Succeeded	03/28/2023 11:...		N, N, Y, 300000009889544, 1, 4, 59003, 2023-03-28	
Update Accrual Plan Enrollments:...	1241905	Succeeded	03/28/2023 11:...		N, N, Y, 300000009889544, 1, 3, 59003, 2023-03-28	
Update Accrual Plan Enrollments:...	1241904	Succeeded	03/28/2023 11:...		N, N, Y, 300000009889544, 1, 2, 59003, 2023-03-28	
Update Accrual Plan Enrollments	1241903	Succeeded	03/28/2023 11:...		N, 2023-03-28, Y, 300000009889544, Administrative Leave	



## STEP 11

Click the calendar icon next to “Effective Date” and select the appropriate value.

Yamhill County DEV2 environment

Yamhill County, Oregon  
"In the heart of the Willamette Valley"

This process will be queued up for submission at position 1

Process Options Advanced Submit Cancel

Name Calculate Accruals and Balances

Description Generates details and balances for accrual plan...  Notify me when this process ends

Schedule As soon as possible Submission Notes

Basic Options

Parameters

\* Effective Date 03/28/2023

Run as test

Include trace statements in audit log

Increment effective date

Plan Type All

Basic Details

Person

Business Unit

Legal Employer

Person Selection Rule

## STEP 12

Check the box “Increment effective date”.

Yamhill County, Oregon  
"In the heart of the Willamette Valley"

This process will be queued up for submission at position 1

Process Options Advanced

Name Calculate Accruals and Balances

Description Generates details and balances for accrual plan...  Notify me when this process ends

Schedule As soon as possible Submission Notes

Basic Options

Parameters

\* Effective Date 03/28/2023

Run as test

Include trace statements in audit log

Increment effective date

Plan Type All

Basic Details

Person

Business Unit

Legal Employer

Person Selection Rule



### STEP 13

Click the dropdown next to “Plan Type” and select the type of plan for the leave you wish to calculate.

Basic Options  
Parameters

\* Effective Date: 03/28/2023

Run as test

Include trace statements in audit log

Increment effective date

Plan Type: All (dropdown menu open showing: Accrual plan, Compensatory time plan, Donation Plan)

Basic Details

Legal Employer: [dropdown]

Person Selection Rule: [dropdown]

Changes Since Last Run: [dropdown]

Payroll: [dropdown]

Legislative Data Group: [dropdown]

Payroll Relationship Group: [dropdown]

20 Absence Plan: [dropdown]

Repeating Period: [dropdown]

### STEP 14

Next, select the desired absence plan.

\* Effective Date: 03/28/2023

Run as test

Include trace statements in audit log

Increment effective date

Plan Type: Accrual plan

Basic Details

Person Selection Rule: [dropdown]

Changes Since Last Run: [dropdown]

Payroll: [dropdown]

Legislative Data Group: [dropdown]

Payroll Relationship Group: [dropdown]

21 Absence Plan: [dropdown menu open showing: Commissioners Day, FET, Floating Holiday, PEL, Sick, Sick Non Benefit Employees, VACATION LM, Vacation, Vacation - MH, ZZ Vacation]

Repeating Period: [dropdown]



## STEP 15

Click on the “Submit” button.

The screenshot shows the 'Calculate Accruals and Balances' process configuration page in the Yamhill County HR system. The page includes a header with the county logo and name, and a navigation bar with buttons for 'Process Options', 'Advanced', 'Submit', and 'Cancel'. The 'Submit' button is highlighted with a red box. Below the navigation bar, there is a section for 'Basic Options' with various parameters and checkboxes. The 'Effective Date' is set to 03/28/2023. The 'Plan Type' is set to 'Accrual plan'. The 'Basic Details' section includes dropdown menus for 'Person', 'Business Unit', 'Legal Employer', and 'Person Selection Rule'. A green checkmark icon is visible next to the 'Person Selection Rule' dropdown.

## STEP 16

Click the “OK” button to acknowledge the confirmation message.

The screenshot shows the same 'Calculate Accruals and Balances' process configuration page as in Step 15, but with a confirmation message overlay. The message box is titled 'Confirmation' and contains the text 'Process 1241908 was submitted.' with an 'OK' button. The 'Submit' button in the background is now greyed out. A green checkmark icon is visible next to the 'Person Selection Rule' dropdown.



## STEP 17

Wait a few minutes, and then click on the “Refresh” icon to validate that the process completed successfully.

Batch Process Name	Job Description	Run
Process Events	Processes absence data in response to HCM events.	
Evaluate Absences	Calculates entitlements for unprocessed absences.	
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Update Accrual Plan Enrollments	Evaluates employee events for enrollment and termination into accrual plans.	
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Withdraw Accruals and Balances	Withdraws accrual details and balances for accrual plans.	
Generate Daily Breakdown of Absence Details	Generates a daily breakdown of absence details for reporting purposes.	

Supplemental Details

View  Flat List  Hierarchy

View  Status  Time Range

Process Name	Process ID	Status	Scheduled Time	View Output	Parameters	View Log
Calculate Accrual and Balances: ...	1241911	Wait	03/28/2023 11:...		ORA_ANC_ACCRUAL, 4, Y, 59004, N, N, 30000000989907, 1, 2023-03-28	1241911.log
Calculate Accrual and Balances: ...	1241910	Wait	03/28/2023 11:...		ORA_ANC_ACCRUAL, 3, Y, 59004, N, N, 30000000989907, 1, 2023-03-28	1241910.log
Calculate Accrual and Balances: ...	1241909	Wait	03/28/2023 11:...		ORA_ANC_ACCRUAL, 2, Y, 59004, N, N, 30000000989907, 1, 2023-03-28	1241909.log
Calculate Accruals and Balances	1241908	Running	03/28/2023 11:...		ORA_ANC_ACCRUAL, LOV_Attribute4_1, 1, Y, N, Vacation, 2023-03-28, 30000000989907, N, PM	1241908.log
Update Accrual Plan Enrollments:...	1241907	Succeeded	03/28/2023 11:...		N, N, Y, 300000009899544, 1, 5, 59003, 2023-03-28	
Update Accrual Plan Enrollments:...	1241906	Succeeded	03/28/2023 11:...		N, N, Y, 300000009899544, 1, 4, 59003, 2023-03-28	

## STEP 18

Click on the “Home” icon to return to the main screen.

Yamhill County DEV2 environment

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Schedule and Monitor Absence Processes

Submit Jobs

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Supplemental Details

View  Flat List  Hierarchy

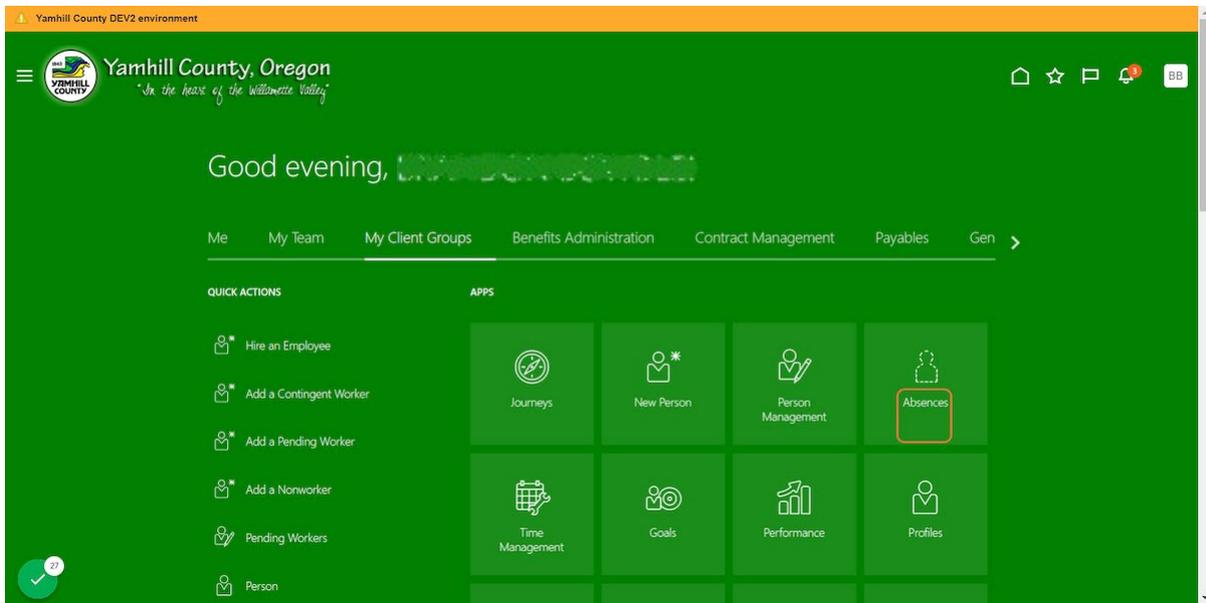
View  Status  Time Range

Process Name	Process ID	Status	Scheduled Time	View Output	Parameters	View Log
Update Accrual Plan Enrollments:...	1241907	Succeeded	03/28/2023 11:...		N, N, Y, 300000009899544, 1, 5, 59003, 2023-03-28	
Update Accrual Plan Enrollments:...	1241906	Succeeded	03/28/2023 11:...		N, N, Y, 300000009899544, 1, 4, 59003, 2023-03-28	



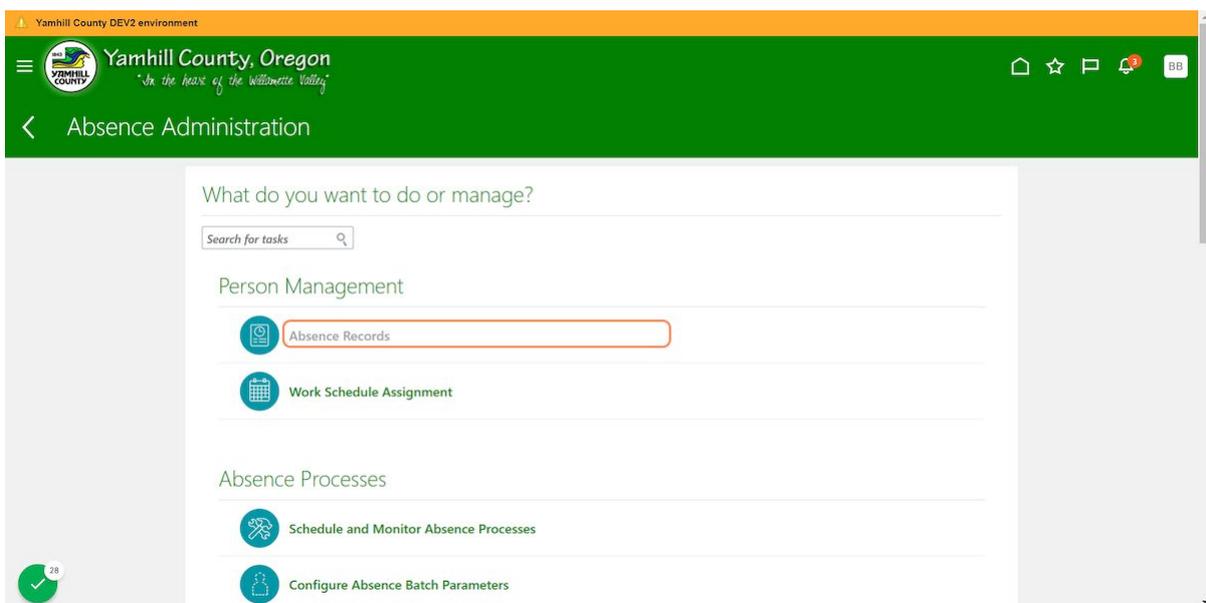
## STEP 19

To view an employee's absence accrual, navigate to "My Client Groups" and select the "Absences" tile.



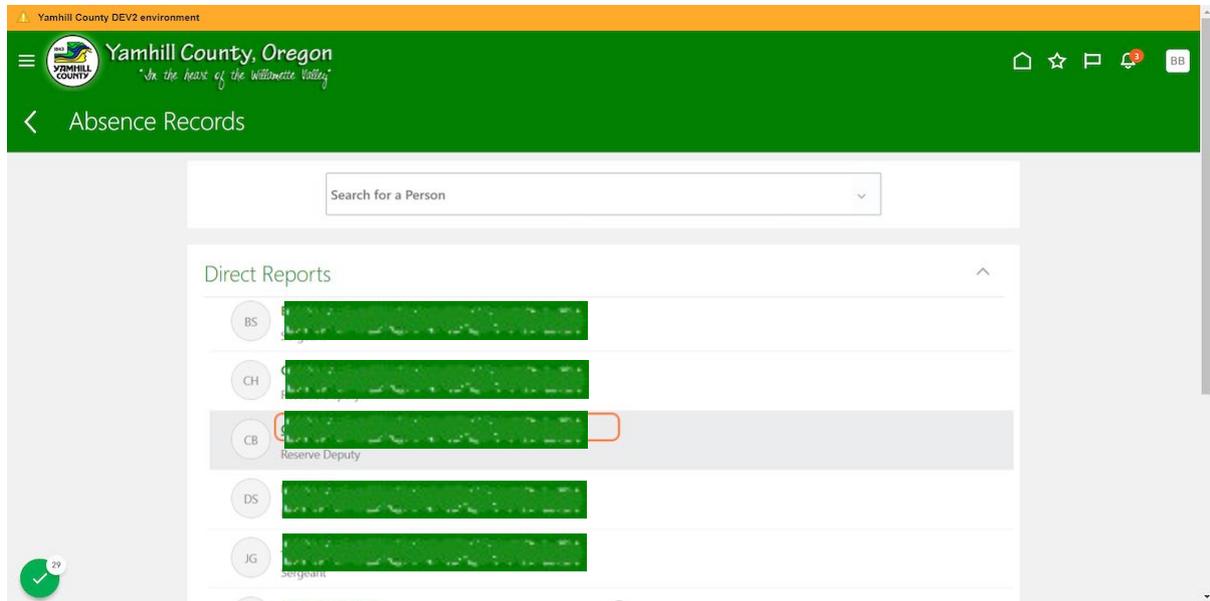
## STEP 20

Click on the "Absence Records" option.



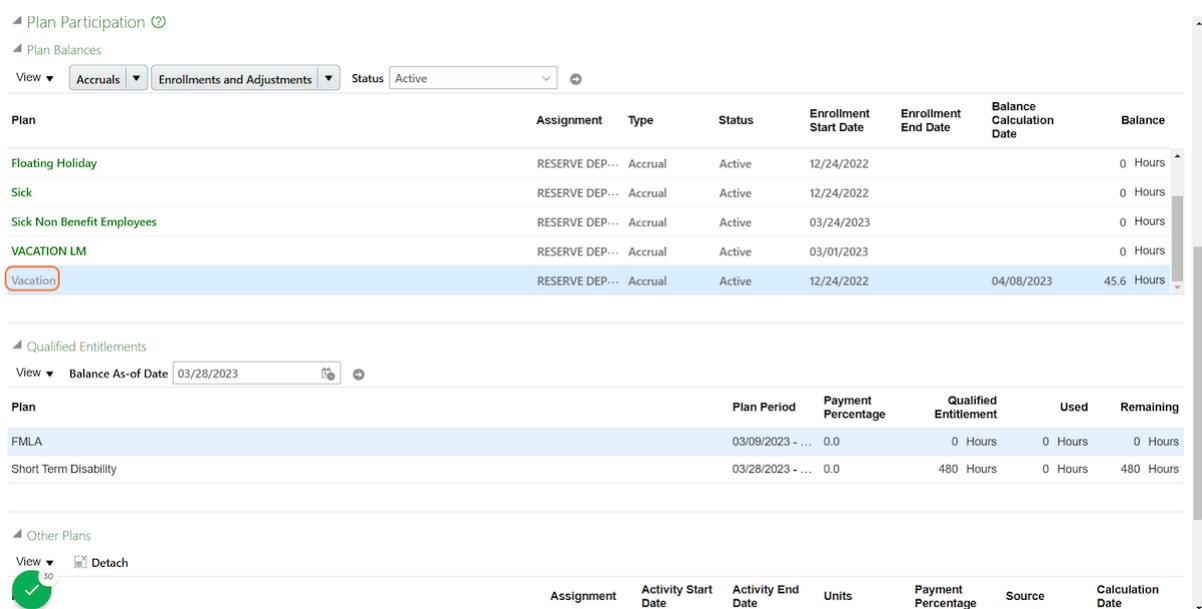
STEP 21

Click on the employee's name.



STEP 22

Scroll to the plan details section of the page and select the absence plan to view the details of the planned activity.



### STEP 23

Review the details, and then click on the “OK” button to continue.

The screenshot shows a software interface for managing absence plans. A modal window titled "Accrual Plan Balance : Vacation" is open, displaying the following information:

- Balance Calculation Date: 04/08/2023
- Plan Period Start Date: 01/01/2023
- Balance: 45.6 Hours

The modal includes a "Summary" section with a table:

Description	Hours
Adjustment	40
Periodic accrual	5.6

An "OK" button is highlighted in the bottom right corner of the modal.

### STEP 24

Click on the “Home” icon to return to the main screen.

The screenshot shows the main screen of the "Manage Absences and Entitlements" application. The header includes the Yamhill County logo and the text "Yamhill County, Oregon". The main content area displays "Absences" and "Existing Absences" sections. A "Home" icon is visible in the top right corner of the header.



STEP 25

**End of the procedure.**

