

# Oracle Fusion Cloud Global Payroll

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**How do I archive payroll results?**

**FA Latest**

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# 1 Introduction

## Scope

Use this playbook to get an understanding of how you can archive payroll results data.

Archive payroll results before you submit processes that use the archived data, such as Run Payroll Register and Generate Payslips. Your payroll cycle flow should reflect the proper sequence of tasks.

If you submit standalone payroll processes, archive the results using the Archive Periodic Payroll Results.

Use the Archive End-of-Year Payroll Results report to retrieve and archive employee and employer information necessary for year-end statutory reporting.

To enhance performance and optimize space utilization of the database, use the HCM Extracts purge feature to set a retention period to control the period of time the archive data is retained before it is purged.

## Introduction to Payroll Archive

The payroll archive process is part of your payroll cycle flow.

Archive payroll results before you submit processes that use the archived prepayment information, such as the Run Payroll Register or the Generate Payslips task or generate external payments. Because payslips and the payroll register use the archived data, it's critical that the archive process completes successfully and it includes complete and accurate information.

The payroll archive process is part of your payroll cycle flow. If you submit standalone payroll processes, use the Archive Periodic Payroll Results task to archive payroll information.

Run this process after the payroll calculation is complete. The archived data typically includes any of these types of information:

- HR data, such as employee and employer address details, employee work location and department, accruals, and assignment details
- Element information, such as earnings and deductions
- Balances information
- Messages

Use archive results to identify errors, unprocessed assignments or missing records. If errors or issue are found, review the employee's HR or payroll data, to identify the cause and make corrections. Once errors and issues are resolved, roll back and rerun the affected processes.

It's important that you complete the following before you archive the payroll results information.

### Enable Payslip Translation

Before you run the payroll archive process, open the default process configuration group and set the process configuration parameter, **Enable Payslip Translation Values to allow payslip translation** to **Y**. Set this parameter only once, so that the application translates the data the Payroll Archive process archives for the payslip.

If you've run the Payroll Archive before setting this parameter, roll back the process, set the parameter to **Y**, and rerun the Payroll Archive process.

### **Set the Payslip Rate Precision Values**

The precision value defines how many decimal points the payslip uses when showing rate amounts. To change the default payslip rate precision value, you must change how the rates are captured in the periodic payroll archive.

Open the default process configuration group, and add the **Payslip Rate Precision** parameter and enter an override value to set the number of decimal points to display the rates on the payslip.

You can change the precision value set on the report template itself, and this value would override the value you set on the archive process. For example, suppose you want your hourly employees to see four decimal places for rates on their payslips and the salaried employees to see only two decimal places. In this case, perform these tasks:

1. Set the **Payslip Rate Precision** process configuration parameter to four decimal places.
2. Change the payslip report template to display the rates with two decimal places only for salaried employees.

## 2 Archive and Manage Payroll Results

### Archive Payroll Results

Archive payroll information such as earnings, deductions, tax calculation details, accruals, payment methods, and so on, before generating payments.

Use any of these tasks to archive the payroll results and view the archived periodic payroll results or the archived end-of-year payroll results.

#### ***Tasks to archive payroll results***

Name of Report	Purpose of Report
Archive Periodic Payroll Results	Run the Archive Periodic Payroll Results task to archive payroll information such as earnings, deductions, tax calculation details, accruals, payment methods, and so on, before generating payments. Run this process after the payroll calculation is complete.
Archive End-of-Year Payroll Results	Run the Archive End-of-Year Payroll Results process to archive employee and employer information for end-of-year statutory reporting. The year-end reports also include employee balances in a given year.

### Translate Payroll Archive Info in Multiple Languages

Translate and report the archived payroll info in a language of your choice.

The payroll archive process is part of your payroll cycle flow. However, if you submit the standalone payroll processes, use the Archive Periodic Payroll Results task to archive payroll information.

Use the following reports to translate and report the payroll archive information:

- Payroll Register Report
- Payroll Register Report for the Latest Process
- Periodic Payroll Register Report

But before you run the Archive Periodic Payroll Results task to archive the payroll results information generated by the standalone payroll processes, you must do the following to ensure that the archive information is translated into multiple languages of your choice.

- Add the process configuration parameter, **Support for Archive Translation National Language Support Code for archive translation**, to your default process configuration group. Add this parameter only once.

If you have run the archive task before adding this parameter, roll back the archive process, add the parameter, and rerun the archive task.

- In the **Override Value** field on your default process configuration group page, enter the NLS codes for the additional languages you require other than the application default language. Use separators if you enter multiple languages.

Apart from the additional languages, the payroll archive data is always archived and stored in the application default language. The default language is generally English, but it can be any other language too.

- Each user has a language preference code configured within his or her user profile. To check the user's language setting, navigate to User Preference > Language > Default Language.

To submit the archive-based payroll reports and view the report output in your preferred language you must update your default language settings. Also add the NLS Code of the preferred language of the submitting user to the Override Value field of the configuration group of the report task or flow.

### Submitting User Language

When you submit a report or a flow that includes a report that reports the payroll archive information, select the

**Submitting User** check box on the tasks tab to ensure that the report is translated in the default language of the submitting user.

The archive process translates the following data that's used to generate the reports:

- Archived payroll information required for the report
- Static text on the report template

## Archive Periodic Payroll Results

Use the Archive Periodic Payroll Results report to archive payroll information before generating payments.

The report archives payroll information such as earnings, deductions, tax calculation details, accruals, payment methods, and so on.

Use the **Submit a Payroll Flow** quick action under the **My Client Groups** tab to run this report.

### When to Run Report

Run the report after the payroll calculation is complete.

### Parameters to Consider

Parameter values determine which records to include in a report. Most parameters are self-explanatory, but some of them, as mentioned in this table have special meaning in the context of the report.

## Archive Periodic Payroll Results Report Parameters

Parameter Name	Description
Process Start Date	Use this field to specify the first effective date of the payroll process to include in the report. All processes with an effective date same or greater than the Process Start Date are reported.
Process End Date	Use this field to specify the last effective date of the payroll process to include in the report. For Payroll Runs this is the 'Payroll Run Date'. All processes with an effective date equal to or prior to the Process End Date are reported.  <b>Note:</b> For offset payrolls, the effective date of the payroll or QuickPay run could be after the end date of the payroll period. In such cases, ensure that your Process End Date must be on or after the effective date of the process you want to include in the report.
Consolidation Group	Use this field to run the report for a consolidation group. For example, you can use this field to run this report for a subset of payrolls. You can select a value only if you have a predefined consolidation group.
Process Configuration Group	Use this field to run the report for a specific process configuration group, instead of the default one. A process configuration group is used to set rules for payroll processes, such as setting the payslip rate precision value. You can select a value only if you have a predefined process configuration group.

## Report Output

Because payslips and the payroll register use archived data, it's critical that the archive process completes successfully and it include complete and accurate information.

Use the Archive Results section on the View Person Process Results page to view a summary of archived results and drill down to view individual archived records.

### View the Archive Results

Use archive results to identify errors, unprocessed assignments or missing records. If errors or issue are found, review the employee's HR or payroll data, to identify the cause and correct. Once errors and issues are resolved, roll back the affected processes and rerun the Archive Periodic Payroll Results report.

### Edit the Archive Results

By default, the extract definition for the payroll archive doesn't allow editing of the output. However, if your environment and your security privileges enable this task, you can use the Edit button in the Archive Results section of the View Person Process Results page. The application stores any changes to the archived results in the archive table, which the payroll register and payment processes then use.

**Note:** Updates made to the archive results will no longer match the originally generated archive. For this reason, avoid manually updating the archive unless necessary.

# Archive End-of-Year Payroll Results

Use the Archive End-of-Year Payroll Results report to retrieve and archive employee and employer information necessary for year-end statutory reporting.

Use the **Submit a Payroll Flow** quick action under the **My Client Groups** tab to run this report.

## When to Run the Report

Run the report at the end of the year and after the payroll calculation is complete.

## Parameters to Consider

Parameter values determine which records to include in a report. Most parameters are self-explanatory, but some of them, as mentioned in this table have special meaning in the context of the report.

### Archive End-of-Year Payroll Results Report Parameters

Parameter Name	Description
Process Start Date	Use this field to specify the first effective date of the payroll process to include in the report. All processes with an effective date same or greater than the Process Start Date are reported.
Process End Date	Use this field to specify the last effective date of the payroll process to include in the report. For Payroll Runs this is the 'Payroll Run Date'. All processes with an effective date equal to or prior to the Process End Date are reported.  <b>Note:</b> For offset payrolls, the effective date of the payroll or QuickPay run could be after the end date of the payroll period. In such cases, ensure that your Process End Date must be on or after the effective date of the process you want to include in the report.
Consolidation Group	Use this field to run the report for a consolidation group. For example, you can use this field to run this report for a subset of payrolls. You can select a value only if you have a predefined consolidation group.
Process Configuration Group	Use this field to run the report for a specific process configuration group, instead of the default one. A process configuration group is used to set rules for payroll processes, such as setting the payslip rate precision value. You can select a value only if you have a predefined process configuration group.
Payroll Statutory Unit	Select the requisite payroll statutory unit (PSU). The process archives the year-end data of employees belonging to this PSU only.
Tax Reporting Unit	Select the requisite tax reporting unit (TRU). If a value is selected, the process archives the year-end data of employees belonging to this TRU only. If left blank, all TRUs belonging to the selected PSU are processed.
Payroll Relationship Group	Select the payroll relationship group name, if you have defined one. This is an optional parameter.

## Report Output

Use the View Person Process Results task to open and view the archived data for each payroll relationship in the selected PSU or TRU. After you have reviewed the results you can try any of these options to refine your results.

### Process Rerun

You may have employees who are excluded from the original archive run, such as a missed vacation payout. The last payroll run for the tax year is successfully completed. You must then rerun the the Archive End-of-Year Payroll Results report to include the excluded employees.

You can rerun the process for an individual employee or a group of employees. Identify the excluded employees and create a payroll relationship group for the individual employee or group of employees and use the object group to rerun the report. The rerun archive process captures data for the employees excluded in the previous archive process. This process doesn't archive data that's already archived by a previous run. To archive data for all the employees once again, you must first roll back the archive process.

### Process Retry

Use the retry process to archive changed, new, or otherwise not archived data for selected employees.

### Process Rollback

Use the Roll Back process to remove the archived data and regeerate the archive data all over again. Sometimes rerun or retry isn't possible. For example, if you ran the Archive End-of-Year Payroll Results process before completion of all the payroll processes. In this case, the data in the archive is not valid. To resolve this you must roll back the archive process. When you roll back the Archive End-of-Year Payroll Results, the process removes the archived data from the Oracle database. Rolling back and rerunning the Archive End-of-Year Payroll Results process reruns the process and recreates the archive completely.

## View Archive Results

Because payslips and the payroll register use archived data, it's critical that the archive process completes successfully and it includes complete and accurate information.

You can access the Archive Results page by using any of these navigation options:

- Navigate to **Payroll** under **My Client Groups** from your Home page and click **View Flows** under the Flow Submission and Results section.
- Use the **View Flows** task under **My Client Groups > Show More > Payroll**.
- Use the **Actions** menu on a person results row to navigate to **Archive Details** page of the employee to view the earnings, deductions, tax calculation details, accruals, payment methods, and so on, before generating payments. Drill down to a detailed HR or payroll details of the person, for example, the person's assignment information, balance classifications, tax card components, tax information, and so on.

From the View Flows page, search for and select the Archive Periodic Payroll Results flow to navigate to the Archive Results page.

Use the Archive Results page to do the following.

- View high-level process statistics displayed at the top of the page. It displays the number of records included in the process and their status.
- Review the process analytics to check the total number of records processed, number of records that are processed successfully, records pending, records that have failed, and records ignored or not processed.

- View additional details for the process to validate you are looking at the correct balance results or troubleshoot and analyze why a specific balance has been generated. For example, an employee has a regular and supplemental payroll run for 31-MAR. Verify you are viewing the balance results for the regular payroll run.
- Review the results, make corrections if required, and from the Actions menu, roll back the process, mark for retry, or rerun the process.
- Use the **Messages** option to navigate to the messages related to the person record.
- Our new search functionality now includes “hierarchical retrieval”, which automatically provides a complete view of its related “child” records. This gives you a more comprehensive understanding of the data's position within its hierarchy without needing multiple searches.
- In addition, use the customizable column visibility, allowing you to tailor your data view. By default, you'll see a clean, uncluttered display with only the most essential columns. You can now easily show or hide additional columns as needed, including Short Code, Output Label, Output Column.

View the archive results by list or table view. Table view lists the result details in the same hierarchy as the extract definition.

## Retain HCM Extracts Archive Data

Use the HCM Extracts purge feature to set a retention period that the archive data is retained and before it's automatically purged.

The HCM Extracts purge process improves performance and optimizes utilization of the database space.

These are the key features of the HCM Extracts purge process.

- After you set the retention period, the process automatically purges payroll information generated by the predefined and user-defined payroll reports.
- The retention period is predetermined for each report and you can't change it.
- The purging happens automatically and you can't control it.
- You always have the latest-dated extract within the retention period irrespective of the number of times you have run the report.

This table lists the retention period for the various payroll reports.

### **Retention Period for Payroll Reports Archive Data**

Flow Pattern	Extract Definition	Archive Retention Period
Generate Prenote File	Generate Prenote File	89
Run Balance Exception Report	Run Balance Exception Report	89
Run Deduction Report	Deduction Report	90
Run Gross-to-Net Report	Gross to Net Summary Archive	90
Run Payment Register Report	Global Payment Register	90
Run Payroll Activity Report	Payroll Activity Report	90

Run Payroll Activity Report for the Latest Process	Payroll Activity Report for the Latest Process	90
Run Payroll Balance Report	Payroll Run Result Report	90
Run Payroll Costing Results	Payroll Costing Report	90
Run Payroll Data Validation Report	Data Validation Report	7
Run Payroll Messages Report	Payroll Messages Report	90
Run Payroll Register Report	Global Payroll Register	90
Run Payroll Register Report for the Latest Process	Payroll Register Report for the Latest Process	90
Run Periodic Payroll Activity Report	Periodic Payroll Activity Report	90
Run Periodic Statutory Deduction Register	Periodic Statutory Deduction Register	90
Run Retroactive Entries Report	Retroactive Entries Report	90
Run Retroactive Notification Report	Retroactive Notification Report	90
Run Statutory Deduction Register	Statutory Deduction Register	90
Run Statutory Deduction Register for the Latest Process	Statutory Deduction Register for the Latest Process	90
Run Third-Party Payment Register Report	Global Third Party Payment Register	90
Run Worker Data Validation Report	Data Validation Report	7

Use the Purge Extracts Archive Data process in Report mode before and after the purge, for a specific extract, to check if the records are being purged.

