Oracle Human Resources Cloud: Using Payroll Flows
### Contents

**Preface**

1 **Introduction**

- Payroll Flows and Flow Patterns  
- Checklist and Flow Tasks  
- FAQ  

2 **Payroll Flow Patterns**

- Create Flow Patterns  
- Flow Pattern Parameters  
- Sequencing Rules for Flows and Locked Tasks  
- Create a Flow Pattern to Reissue a Check  
- Connect Flows  
- Flow Security and Flow Owners  
- Flow Within a Flow  
- Value Sets in Payroll Flows  
- Multiple Instance of a Flow  
- FAQs  

3 **Edit Flows**

- How Flow Patterns are Edited  
- Examples of Editing Flow Patterns  
- Edit a Flow Pattern  
- Updating Delivered Flow Patterns  
- Add a BI Publisher Report to a Flow  
- Add an Individual Flow Task within a Checklist  
- FAQs
Preface

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

Using Oracle Applications

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Conventions

The following table explains the text conventions used in this guide.

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td><strong>monospace</strong></td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than symbol separates elements in a navigation path.</td>
</tr>
</tbody>
</table>

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1 Introduction

Payroll Flows and Flow Patterns

A payroll pattern is a set of predefined tasks, such as processes, reports, and single tasks, grouped together in a predefined order. After you create a flow pattern, provide a unique name for the flow pattern, and submit the flow pattern. This instance of a flow pattern submission is referred to as a flow.

You can use a single task such as the Calculate Payroll or a series of multiple tasks to create the flow pattern. The tasks are grouped into activities such as extract reports and processes, or tasks that cover a phase of the payroll process. The tasks can be automatic or manual tasks.

Here's what you can do with a flow pattern.

- Determine the sequence of tasks to be executed.
- Define parameter binding rules so that you can enter parameters that are common across multiple tasks, such as dates, only once on submission. When you submit the flow, the parameter value is constant across all tasks within the flow.
- Use the checklist to monitor the status of tasks within the flow.

After you have submitted a flow pattern, here's what you can do with the flow.

- Schedule the tasks to run at a specified time or at regular intervals so that you can monitor the status of the tasks within a flow.
- Link one or more flows to create a process.
- Define a flow within a flow.
- Define a flow to execute multiple instances of a task within the flow.

Predefined Flow Patterns

Here are some payroll flow patterns that are automatically available to you:

- Expedited Payroll Flow
- Payroll Cycle
- QuickPay
- QuickPay and View SOE
- QuickPay Simplified
- Simplified Payroll Cycle

For example, use the Expedited Payroll Flow pattern to identify, calculate, and make expedited payments. The Expedited Payroll Flow pattern includes the following tasks:

1. Recalculate Payroll for Retroactive Changes
2. Calculate Payroll
3. Calculate Prepayments
4. Archive Periodic Payroll Results
5. Generate Check Payments
6. Make EFT Payments
7. Generate Payslips

You can also use stand-alone tasks, like the Generate Check Payments or the Run Payroll Register, that submit a single process or report. You can submit these flows as an individual task or include them within a flow to complete a process.

Configured Flow Patterns

Use the Manage Payroll Flow Patterns task or the Refine Extracts flow to create your own flow patterns or copy an existing flow pattern. Copy and modify an existing flow to add, delete, or reorder the list of tasks within the flow and create your own flow pattern.

Checklist and Flow Tasks

When you submit a flow pattern it creates an instance of the flow. For every submitted flow, the application generates a checklist by default. The flow can be a task flow, process, or report.

Here’s what the checklist might include, depending on the flow pattern.

- Automatic tasks, such as extracts, reports, and processes
- Manual tasks, such as the Verify Payroll Process verification task, required to complete a flow

Here’s what you can do with checklists.

- Monitor the status of the flow tasks
- Manage the flow tasks, such as reassigning tasks, marking tasks as completed, and performing corrective actions
- View task details, such as a list of records processed by the flow

While working on a task in the flow, you can remain in the Payroll Checklist work area or go to a related work area that includes tasks in the regional area. For example, while reviewing the results for the Calculate Payroll task, you can go to the Payroll Calculation work area to review the person’s calculation card or element entries.

FAQ

What’s the difference between a flow pattern and a flow?

Group together a set of predefined tasks, such as processes, reports, and single tasks, in a predefined order to form a flow pattern. A flow pattern can consist of a single task such as Calculate Payroll or a series of tasks.

Provide a unique name for the flow pattern and submit the flow pattern, using the Submit a Payroll Flow task. This instance of a flow pattern is referred to as a flow.
2 Payroll Flow Patterns

Create Flow Patterns

Use flow patterns to create flows that group tasks to complete your extract reports, processes, or payroll tasks. Build flow patterns from the delivered tasks, such as processes, reports, or task flows.

For example, use the delivered Expedited Payroll flow pattern to identify, calculate, and make expedited payments.

Build a Flow Pattern

Let’s look at the steps to create a flow pattern.

1. Select the Manage Payroll Flow Patterns task in the Payroll Checklist work area or the Refine Extracts flow from the Data Exchange work area.
2. Create a new flow pattern or search for and select an existing flow pattern to copy.
3. Select a legislative data group (LDG).
4. Make these selections on the Basic information page.
   a. Select one of these LDG Required options.
      i. Flow pattern available to all LDGs
      ii. Flow pattern restricted by LDG
   b. Select a Flow Status option.
5. Select the activities and tasks to include in the flow pattern.
   The activity you select for the task determines the work area where you can submit the flow.
6. On the Tasks page, complete this information.
   o If necessary, rename the task and description, and change the activity or task group.
   For example, place all your reports in the Statutory activity and rename each verification task to include the report name.
   o Select a task owner.
   o Skip the step to specify the duration dates. The duration dates determine when to send the notification to alert the flow owner or task owner to start a task or to alert them that the task is overdue. Return to this step after you complete flow parameters on the Parameters page.
   o Select the type of notifications that you want the flow or task owner to receive.
7. On the Task Sequence page, review the task sequence and reorder, add or delete tasks, as required.
   All flow patterns begin with a Start task and conclude with an End task. Tasks are sequential but you can start processing more than one task concurrently. For example you can run reports concurrently along with the process.
8. On the Edit Task Details: Owner and Checklist page, specify a sequence value and decide the order in which the tasks display in the checklist.
9. On the Parameters page, select the parameters to submit and complete the tasks in the flow pattern. Alternately, use the parameters as a basis for deriving values to submit the remaining tasks in the flow pattern.
10. On the Task Parameters page, review and if necessary, update the parameters.
For example, specify a constant if the value is the same for all tasks, such as the Process Configuration Group parameter.

11. Specify the duration dates on the Tasks page of the Manage Payroll Flow Patterns page. Optionally, offset the date by specifying a plus or minus value depending on whether the date falls before or after the duration date.

12. Use the Manage Payroll Flow Security Profile task in the Setup and Maintenance work area, to define a security profile for the flow pattern.

   The HCM data role security controls who can submit the flow pattern or view the resulting flow from the Payroll Dashboard or payroll work areas.

13. Review the resulting checklist.

14. Click Save and Close, or click Submit.

Flow Pattern Parameters

Each task in a flow pattern supports task actions, such as submit, roll back, mark for retry, retry, and view. Task action parameters control how the application processes a task and how the task relates to other tasks in the flow pattern.

Flow parameters are a subset of task action parameters. They supply the information required to successfully complete the tasks in the flow pattern.

- When you create a flow pattern, review and edit the task parameters for the Submit and Initialize task actions.

- Before you submit a flow, review and edit the task action parameters and the flow parameters for each task within the flow. Task action parameters control task interactions.

- After you submit the flow pattern, edit the parameters for the remaining task actions, such as Mark for Retry, Retry, and Roll Back, as required.
The following figure shows the relationship of the tasks, task action parameters, and flow parameters in a flow pattern.

Here’s the parameter details you can edit:

- Display and display format
- Lookups and value sets
- Usage
- Sequence
- Parameter Basis and Basis Value

**Display and Display Formats**

Display parameters control the format and availability of the flow parameter, as shown below.

<table>
<thead>
<tr>
<th>Parameters</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display</td>
<td>Determines whether the parameter displays on the page when you submit the flow.</td>
</tr>
<tr>
<td>Display Format</td>
<td>Identifies the type of data displayed, such as a date or text, or choice list</td>
</tr>
</tbody>
</table>
Display parameters work with other parameters, such as Parameter Basis and Basis Value. For example, most task action parameters don’t display the Request parameter because the application obtains the value for this parameter from the context.

### Lookups and Value Sets

Use lookups and value sets for descriptive flexfields to control and validate the data used in the payroll flow pattern.

Here’s the list of methods by which the lookup values are derived and the corresponding parameter basis you can use.

<table>
<thead>
<tr>
<th>Lookup Value</th>
<th>Parameter Basis</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entered when submitting a flow</td>
<td>Bind to Flow</td>
</tr>
<tr>
<td>The application derives the value during flow submission and presents it.</td>
<td>SQL Bind or Bind to Flow Task or Context Binding</td>
</tr>
<tr>
<td>The application derives the value from a Post SQL process</td>
<td>Post SQL Bind</td>
</tr>
</tbody>
</table>

### Usage

A parameter can receive information or generate information that subsequent tasks can use. For example, for the Calculate Payroll task, the Payroll Process parameter for the Submit task action generates an output value for the payroll action ID. The Retry task action can use this payroll action ID.

Here’s the typical settings for a parameter whose usage is output. For output usage parameters the parameter isn’t displayed and its value is derived using the parameter basis.

<table>
<thead>
<tr>
<th>Parameter Option</th>
<th>Setting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display</td>
<td>No</td>
</tr>
<tr>
<td>Parameter Basis</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Bind to Flow, the application derives the value from the flow parameter and then updates the flow parameters table with the output value</td>
</tr>
<tr>
<td></td>
<td>- If you select no value, the output value results from the task’s output</td>
</tr>
</tbody>
</table>

### Sequence

Sequence numbers control the order in which the application processes and displays the parameters by specifying the sequence. For example, if you have two lookups and the values of the second lookup depends on the first lookup. You must set the first lookup to a lower sequence number than the second one.
Parameter Basis and Basis Value

The parameter basis controls how the application derives the value for the parameter. The basis value further specifies the value the application uses for the parameter.

Here’s the list of values to select parameter basis and basis values when you define payroll flows. The table provides examples when you can select them and describes how the values are assigned.

<table>
<thead>
<tr>
<th>Parameter Basis</th>
<th>Description</th>
<th>Basis Value Available</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use Specified Value</td>
<td>Assigns a specific value to the parameter.</td>
<td>Enter the text as a constant or value, when you submit the flow.</td>
<td>Specify a constant if the value is the same for all tasks, such as the payroll statutory unit.</td>
</tr>
<tr>
<td>Bind to Context</td>
<td>Derives the value from the context of the current flow instance or the task instance of the flow pattern.</td>
<td>Select flow, task, or the Request. The application automatically generates the parameter value.</td>
<td>If the task includes a Request parameter, bind it to the flow context. Tasks in the flow reference this task using the Request ID generated by the application. Bind the legislative data group parameter to a task parameter that supplies the legislative data group. For example, the legislative data group for prepayments uses the payroll as context, because it’s already associated with the legislative data group.</td>
</tr>
<tr>
<td>Bind to Flow Parameter</td>
<td>Derives the value from one of the flow parameter values.</td>
<td>Application automatically derives the parameter value.</td>
<td>Bind a parameter to the flow that several tasks share to avoid multiple occurrences of the same parameter.</td>
</tr>
<tr>
<td>Bind to Flow Task Parameter</td>
<td>Binds the value to the output of the previous task.</td>
<td>Select a value from the previous task’s parameters.</td>
<td>Bind a parameter to a task, such as Retry corrective action. When the flow owner resubmits the task to retry it, the application uses the output of the Submit task parameter.</td>
</tr>
<tr>
<td>Bind to Task Parameter</td>
<td>Resolves the value for the task parameter.</td>
<td>Select a value from the current task’s parameters.</td>
<td>Bind a parameter to the task if several tasks share a parameter, such as a start date, but one task requires a different date.</td>
</tr>
<tr>
<td>No value specified</td>
<td>Stops the application from generating a parameter value when the task executes.</td>
<td>Application generates a blank value.</td>
<td>Not applicable</td>
</tr>
<tr>
<td>Post SQL Bind</td>
<td>Calculates the parameter but doesn’t display it on the user interface.</td>
<td>SQL statement calculates the parameter value.</td>
<td>Bind a parameter using the Post SQL bind to generate data.</td>
</tr>
</tbody>
</table>
### Sequencing Rules for Flows and Locked Tasks

The tasks in a flow use and build upon the results of previous tasks. To maintain data integrity and prevent deletions, the application determines whether a task should lock the results of previous payroll relationship actions. Locking the results of payroll relationship actions prevent processing corrective actions, such as retrying a process. You must roll back or mark for retry the process that locks the results.

For example, the Calculate Prepayment process locks the results of the payroll relationship actions calculated in the payroll run. Before you can retry the payroll calculation process, you must roll back or mark for retry the prepayment process.

### Rules for Sequenced and Non-sequenced Flows

Locking rules identify tasks as sequenced or non-sequenced. This identification determines the conditions for inserting and processing a task in a flow.

Here's the locking rules associated with sequenced and non-sequenced tasks.

<table>
<thead>
<tr>
<th>Task</th>
<th>Rule</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sequenced</td>
<td>No locks created</td>
</tr>
<tr>
<td></td>
<td>Exceptions:</td>
</tr>
<tr>
<td></td>
<td>• Calculate Retroactive Costing</td>
</tr>
<tr>
<td></td>
<td>• Reverse Payroll Calculation</td>
</tr>
</tbody>
</table>

| Non-sequenced   | Locks created               |
Here’s the list of sequenced tasks in the order they’re usually processed. All other tasks are non-sequenced and lock the results of previous processes.

<table>
<thead>
<tr>
<th>Sequenced Tasks</th>
<th>Locks Other Tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Load Initial Balances</td>
<td>No</td>
</tr>
<tr>
<td>Recalculate Payroll for Retroactive Changes</td>
<td>No</td>
</tr>
<tr>
<td>Calculate Retroactive Costing</td>
<td>Yes</td>
</tr>
<tr>
<td>Calculate Payroll</td>
<td>No</td>
</tr>
<tr>
<td>Calculate Gross Earnings</td>
<td>No</td>
</tr>
<tr>
<td>Calculate QuickPay</td>
<td>No</td>
</tr>
<tr>
<td>Reverse Payroll Calculation</td>
<td>Yes</td>
</tr>
<tr>
<td>Adjust Individual Balances</td>
<td>No</td>
</tr>
</tbody>
</table>

Note: If several flows share the same process date, the sequence number in the database determines the order for processing the tasks.

Reports that Create Locks

Typically, reports temporarily lock results of previous calculations while they run. Some reports do lock results. For example, the payslip report locks archived payment results. You might also create reports for a particular legislative data group that lock the results of periodic and year-end archive tasks.

To correct data for reports that lock results:

1. Roll back the report.
2. Roll back the archive task.
3. Correct the data.
4. Resubmit the report.

Common Locking Scenarios

You receive alerts when you submit a task and can’t process payroll relationship records because another process has locked the records. For example, suppose you submit the weekly payroll run, and then submit a flow to calculate QuickPay. The submission is for a payroll relationship for the same payroll and payroll period as the regular payroll run. You receive an alert that the payroll relationship record is locked. You can’t start the task to calculate QuickPay until the tasks in the weekly payroll run that use the locked results of the calculations for the payroll run complete.
Create a Flow Pattern to Reissue a Check

In this example, you create a payroll flow pattern to issue a replacement check that an employee lost or didn’t receive. Here’s the key decisions to consider for this scenario.

<table>
<thead>
<tr>
<th>Decision to Consider</th>
<th>In This Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Which tasks should the flow pattern include and in what sequence?</td>
<td>Verify a Payment, Void Payment, Generate Check Payment</td>
</tr>
<tr>
<td>Who has access to submit the flow?</td>
<td>InFusion Payroll Manager</td>
</tr>
<tr>
<td>Which notifications should the flow owner receive?</td>
<td>Error and Warning notifications</td>
</tr>
<tr>
<td>Which predefined task or flow parameters do you want to override?</td>
<td>Process Configuration Group parameter for the Void Payment task</td>
</tr>
</tbody>
</table>

Create the Payroll Flow Pattern

1. Select the Manage Payroll Flow Patterns task and create a new flow pattern for the legislative data group.
2. On the Create Payroll Flow Pattern: Basic Information page, complete these fields.

<table>
<thead>
<tr>
<th>Region</th>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic Information</td>
<td>Flow Pattern</td>
<td>InFusion Reissue Check</td>
</tr>
<tr>
<td>Activities</td>
<td>Activities to Include</td>
<td>Payment</td>
</tr>
<tr>
<td>Tasks</td>
<td>Available Tasks</td>
<td>Void Payment, Generate Check Payments, Verify a Payment</td>
</tr>
</tbody>
</table>

3. Click Next.
4. On the Create Payroll Flow Pattern: Tasks page, select the Verify the Payment task.
5. In the Owner and Checklist region, click the Owner field, and select Payroll Manager.
6. On the Create Flow Pattern: Tasks Sequence page, confirm tasks follow this sequence: Verify a Payment, Void Payment, Generate Check Payment. Correct the sequence, if necessary.
7. On the Create Payroll Flow Pattern: Flow Parameters page, click Select and Add. For each field, select these multiple parameters from the Select and Add window.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Void Payment</td>
<td>Start Check Number, End Check Number, Process Configuration Group, Process Date, Payroll Process, Reason</td>
</tr>
</tbody>
</table>
Oracle Human Resources Cloud:  
Using Payroll Flows  
Chapter 2  
Payroll Flow Patterns

<table>
<thead>
<tr>
<th>Field</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display</td>
<td>No</td>
</tr>
<tr>
<td>Display Format</td>
<td>Text</td>
</tr>
<tr>
<td>Lookups</td>
<td>No value</td>
</tr>
<tr>
<td>Parameter Basis</td>
<td>Use Specified Value</td>
</tr>
<tr>
<td>Basis Value</td>
<td>InFusion Process Configuration Group</td>
</tr>
</tbody>
</table>

Don’t edit the Process Configuration Group task parameter. The application uses the details specified for the flow parameter, not the task parameter details.

9. On the Create Payroll Flow Pattern: Review page, preview the resulting payroll checklist, and submit the flow pattern.

Connect Flows

Options for Connecting Flows

When you submit a flow, you can connect it to one or more flows on the Flow Interaction page. Your data security access controls which flows you can view and submit, and therefore, which flows you can connect.

If you connect the flow to active flows, the Linked Flows section of the active flows lists the newly submitted flow. You can’t combine flows that are in progress, but you can submit a flow and connect it to an active or completed flow.

Note: If you frequently connect a flow to another flow, such as an extract to a weekly payroll run flow, add that flow to the payroll flow pattern for your weekly payroll run. The next time you submit the flow, the checklist includes the task.

Connect a Flow at the Beginning or End of Another Flow

Submit a flow and connect it to the beginning of a flow that you haven’t started or to the end of a completed flow or a flow that’s in progress. For example, submit the costing of payments flow and connect it to the end of a completed QuickPay and payments distribution flow to cost the payments for both flows.
Here's an example of submitting a report flow and connecting it to the end of the prepayments flow to view the prepayments results in the report.

This example illustrates submitting a flow to cost payments and connecting it to a monthly and weekly payroll flow to process the combined results.
Connect a Flow Within an Active Flow

You can’t combine two flows that are in progress, but you can insert a new flow into an active flow. You might do this to perform tasks in an activity, such as the payments or accounting activity. You might connect flows to process two sets of records in a single prepayments process. For example, if you remove records for correction from the regular payroll run flow, and then process them with several QuickPay flows, you can merge them to calculate the QuickPay payments.

- You can do this to perform tasks in an activity, such as the payments or accounting activity.
- You can connect flows to process two sets of records in a single prepayments process. For example, if you remove records for correction from the regular payroll run flow, and then process them with several QuickPay flows, you can merge them to calculate the QuickPay payments.

When you connect flows, consider whether the submitted flow includes the same tasks as the active flow after the insertion point as given here.

<table>
<thead>
<tr>
<th>Tasks After Insertion Point</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Same tasks</td>
<td>Select the Use to Calculate Results option to process the results of both flows in the remaining tasks</td>
</tr>
<tr>
<td>Different tasks</td>
<td>Specify where to stop the active flow and complete tasks in the submitted flow before returning to the active flow</td>
</tr>
</tbody>
</table>

This figure shows the sequence of tasks processed if you submit a QuickPay flow and connect it to the payroll run flow for the same payroll and payroll period to process the payments tasks together.

1. After the payroll calculation in the payroll run flow completes, the QuickPay calculation starts.
2. The application waits to run the Gross-to-Net task until the task to verify the QuickPay results complete.
3. The application skips the remaining tasks of the QuickPay flow, which are the same as the payroll run flow, and uses the results of the QuickPay flow in the payroll run flow.

This figure shows the sequence of tasks processed if you submit a QuickPay flow and select the option to use the results of the QuickPay calculation in the reports generated for the payroll run flow. In this example, the flows don’t include the same tasks.

1. After the payroll calculation in the regular run completes, the QuickPay calculation starts.
2. After the QuickPay verification task completes, the application processes the two reports that include the results of the QuickPay flow.
3. The application returns to the QuickPay flow to process the external payment.
4. After the QuickPay payment verification task completes, the application processes the payments for the regular run.
Create a Flow Interaction

In this example, you connect the Element Results Register to the biweekly payroll cycle to review the results for the current and previous payroll cycles.

Here’s the key decisions for this scenario.

<table>
<thead>
<tr>
<th>Decisions to Consider</th>
<th>In this Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Which start and end dates include the two payroll cycles?</td>
<td>May 1 - May 31</td>
</tr>
<tr>
<td>Do you want to filter the type of results reported?</td>
<td>Earnings balance category</td>
</tr>
<tr>
<td>Do you want to exclude any QuickPay flows processed during that period from the report?</td>
<td>No</td>
</tr>
<tr>
<td>Where will you insert the Run Element Results Register task?</td>
<td>Before the Verify Reports task in the May 31 Biweekly Flow</td>
</tr>
</tbody>
</table>

In this example, the payroll manager submits an Element Results Register report to view the elements included in Earnings balance category for the current and previous payroll runs. The manager inserts the monthly report in the current payroll flow after the task that verifies the payroll calculation reports for the biweekly period.

Before You Start

1. Create a payroll flow pattern to process a biweekly payroll
2. Create a balance category for earnings, which includes elements that generate earnings balances.
3. Complete the biweekly payroll flow for the payroll period that ends 15 May.
4. Submit the biweekly payroll flow for the payroll period that ends 31 May.

Submit the Element Results Register

1. From the Payroll Calculation work area, click the Submit a Process or Report task.
2. On the Select Flow Pattern page, select the legislative data group.
3. From the Process or Report section, select the Run Element Results Register. Click Next.
4. On the Enter Parameters page, complete these fields.
   - This table lists field names and their respective values to run the Element Results Register.
Field | Value
---|---
Payroll Flow | Element Results Register for May Earnings
Process Start Date | May 1
Process End Date | May 31
Payroll | Biweekly Payroll
Balance Category | Earnings

5. Click **Next**.
6. On the Enter Flow Interaction page, in the Flow Interaction section, click **Add**.
7. Enter these details in the row.
   This table lists field names and their respective values to define the flow interaction.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>From Payroll Flow</td>
<td>Current</td>
</tr>
<tr>
<td>From Task</td>
<td>Start Flow</td>
</tr>
<tr>
<td>To Payroll Flow</td>
<td>May 31 Biweekly Flow</td>
</tr>
<tr>
<td>To Task</td>
<td>Verify Reports</td>
</tr>
</tbody>
</table>

8. Click **Next**.
9. On the Review page, review the information you entered previously and click **Submit**.

   The Element Results Register for May Earnings flow runs after the verification task in the May 31 biweekly Flow. Compare the results of both reports after they complete.

**Flow Security and Flow Owners**

**Flow Security and Flow Owners**

Your **HCM data role** security determines which flows you can submit or view. This topic explains how the HCM data roles and flow security work together. Use the Manage Payroll Flow Security Profile task in the Setup and Maintenance work area to define security for payroll flow patterns.
Payroll Flow Security and HCM Data Roles

HCM data roles secure the access to flows through data privileges and to the tasks on a checklist through functional privileges.

- When you submit a flow pattern, it generates a checklist of the included tasks.
- You become the owner of the flow and its tasks. If a flow pattern designates tasks to different owners, you remain the flow owner.
- Either you or the owner of a task can reassign the task to someone else. For example, to cover situations where the task is overdue and the task owner is on leave.

This figure illustrates how the payroll manager and payroll administrator can submit a process or report and can view the results of the monthly payroll flow.

- The payroll manager or the payroll administrator can submit the flow and perform its tasks or have the tasks reassigned to them.
- The payroll manager and the payroll administrator can perform the same tasks because both of them have the same functional privileges.
- They can both submit and view the payroll flow data.

This figure illustrates how only the payroll manager can calculate the payroll. The payroll manager can't reassign this task to a payroll administrator, because the administrator doesn't have the necessary functional privileges to submit the monthly payroll flow action.
Troubleshooting

If you encounter problems submitting or completing a task in a flow, these are the actions you can take.

<table>
<thead>
<tr>
<th>Problem</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Can’t submit or view a flow</td>
<td>Confirm that the data role assigned to you includes a security profile for the payroll flow pattern.</td>
</tr>
<tr>
<td>Can’t perform a task, such as a process or report</td>
<td>Confirm that your data role is based on a job or abstract role that includes functional privileges to perform that task.</td>
</tr>
</tbody>
</table>

Examples of Flow Pattern Security Profiles

You can use different methods to organize payroll flows into appropriate security profiles. Use the Assign Security Profiles to Role task in the Setup and Maintenance work area to grant workers access to those profiles by data role.

Scenario

Here’s a few examples of payroll security profiles and data roles.
Multiple Owners for a Flow

You can assign payroll flows and tasks within payroll flows to individuals or a group of individuals. When you assign group ownership, all members of the group have access to the tasks. Any member of the group can claim ownership of a task and complete the task, even if they haven’t submitted the task.

While creating a flow pattern, use the Owner Type and Owner fields to specify the group or person who can have access to the tasks.

Task ownership and access are given by default to the person who submits the flow. Granting the task ownership and access only to a single person seems restrictive. Only the person who submits the flow can take corrective action on the task and access the report output. Granting ownership to more than one person ensures continuity and completion of the task. Anyone who has access to the flow can monitor the task even if they’re not owners of the task. For example, if the person who submitted the task is unavailable, and the task is overdue, someone else can monitor and complete the task.

You can assign group ownership only to user-defined flows and not the predefined flows. When the ownership is defined at a flow level, any future flow instance inherits the group information.

After you submit the flow, you can assign group ownership to the individual tasks. Such ownership is only applicable to the particular flow instance.

Create Data Roles and Security

Before you assign ownership, consider these points:

1. Create a data role that you can assign to the users you plan to group together. Use the Manage Data Roles and Security Profiles task to create the data role. The grouping of users is through the data role you create.

2. Associate appropriate job roles and security profiles as required. The values you associate determine which flows a person with this data role can submit or view.

Create Users and Add the Data Role

After you create the data role, use the Manage Users task to create users. Use Add Role in the Roles region to provision the newly created data role manually to the user.

Select the Task Owners

The HCM data role security determines who can submit or view the tasks within the flow pattern. You must be a payroll supervisor or administrator to process payroll and review payroll report outputs and extracts. Once you have initiated a payroll flow, others within the group can monitor the flow and ensure the tasks within the flow are completed successfully. You can assign appropriate responsibilities and functional privileges while defining the different data roles and security profiles.

Related Topics

• Create HCM Data Roles for Global Payroll Implementation Users
Edit a Flow Pattern and Create Multiple Owners

In this you copy a QuickPay flow pattern and change the task owners and assign tasks to multiple individuals within a group. You also claim a task within the flow, review notifications, and set the status of the flow task as 'Completed', so that the flow continues.

Here’s the key decisions to consider for this scenario.

<table>
<thead>
<tr>
<th>Decisions to Consider</th>
<th>In this Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who is the task owner for the Verify Payroll Results task?</td>
<td>Payroll Supervisor</td>
</tr>
<tr>
<td>Who is the task owner for the Calculate QuickPay Prepayments task?</td>
<td>Any person who has the Payroll Clerk data role and privileges.</td>
</tr>
<tr>
<td>Who is the task owner for the View Prepayments Results task?</td>
<td>Payroll Supervisor</td>
</tr>
<tr>
<td>Who is the task owner for the Make External Payment task?</td>
<td>Any person who has the Payroll Clerk data role and privileges.</td>
</tr>
<tr>
<td>Who is the task owner for the Verify Payment task?</td>
<td>Payroll Supervisor</td>
</tr>
</tbody>
</table>

Before You Start

Before you begin, complete the following.

1. Use the Manage Payroll Flow Pattern task and create a QuickPay flow pattern by copying the predefined QuickPay flow pattern. Enter a name for the copied flow pattern and enter the legislative data group (LDG), to restrict this flow to a single LDG. Use the Owner Type and Owner fields to specify the group or person who can have access to the tasks.

2. Use the Manage Data Roles and Security Profiles task and create a data role for Payroll Supervisor and Payroll Clerk.

3. Set up the right privileges for the data roles you create.

Specify a Task Owner

The HCM data role security determines who can submit or view the tasks within the flow pattern. To specify a task owner:

1. In the Payroll Checklist work area, click the Manage Payroll Flow Patterns task from the task pane.
2. On the Manage Payroll Flow Patterns page, search for the QuickPay flow that you created, and edit the flow pattern.
3. On the Tasks tab, select the Verify Payroll Results task, and click Edit Task .
4. On the Edit Task Details: Owner and Checklist page, complete these fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owner Type</td>
<td>User</td>
</tr>
</tbody>
</table>
5. Similarly, select the **View Prepayment Results** task and select **Payroll Supervisor** as the task owner.
6. Next, select the **Verify Payment** task and select **Payroll Supervisor** as the task owner.
7. On the Tasks tab, select the **Calculate QuickPay Prepayments** task, and click **Edit Task**.
8. On the Edit Task Details: Owner and Checklist page, complete these fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owner Type</td>
<td>Group</td>
</tr>
<tr>
<td>Owner</td>
<td>Payroll Clerk</td>
</tr>
</tbody>
</table>

9. Similarly, select the **Make External Payment** task and select **Payroll Supervisor** as the task owner.
10. In the Notifications region, select the **Flow Task Start Notification** option for each task.
11. Click **Submit**, and return to the Manage Payroll Flow Patterns page.
12. On the Manage Payroll Flow Patterns page, click **Submit**.

### Claim a Task and Monitor the Task Status

Once a task is assigned to a group, all users within the group receive the notification for the task, once the task is in the 'Started' status in the checklist. You can review the notification sent to you and claim the task.

1. In the Payroll Checklist work area, click the **Manage Payroll Flow Patterns** task from the task pane.
2. On the Manage Payroll Flow Patterns page, search for the QuickPay flow that you created, and edit the flow pattern.
3. On the Tasks tab, select the **Calculate QuickPay Prepayments** task, and click **Edit Task**.
4. In the Notifications region, select **Claim** from the Actions menu.
   
   Once you have claimed the task, the checklist displays you as the owner of the task. Using the checklist you can set the status of the task as, 'Mark as Complete', 'Mark as Incomplete', and so on.
5. In the Notifications region, use the Actions menu to set the status of the task as, 'Mark as Complete', to continue the flow.
   
   You can also approve, reject, or reassign the task using the Actions menu in the Notifications region.

### Flow Within a Flow

#### Create a Flow within a Flow

In this example you copy the Transfer Batch flow and modify it to include a predefined report flow pattern you created earlier. The predefined flow you add submits a report to check for any batch line errors during the Transfer Batch process. If the transfer fails, you can skip the transfer process or mark it as complete, and then view the report for error details.

**Create the Parent Flow Pattern**

1. In the Payroll Checklist work area, select the **Manage Payroll Flow Patterns** task.
2. Search for and select the row for **Transfer Batch**, and then click **Copy**.
3. Enter the name of the new flow pattern, such as **Transfer Batch with Error Report**.
4. Enter a description, such as "Transfer a batch and view any batch line errors that occurred." and then click Save and Close.

5. Search for and select the Transfer Batch with Error Report flow pattern, and then click Edit.

6. To add the parameter that derives batch name from the batch ID:
   a. On the Parameters tab, click Add.
   b. Select the added row and click Edit.
   c. Add these values.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flow Parameter</td>
<td>Batch Name</td>
</tr>
<tr>
<td>Use for Searches</td>
<td>No</td>
</tr>
<tr>
<td>Display</td>
<td>No</td>
</tr>
<tr>
<td>Display Format</td>
<td>Text</td>
</tr>
<tr>
<td>Sequence</td>
<td>3</td>
</tr>
<tr>
<td>Usage</td>
<td>Input parameter</td>
</tr>
<tr>
<td>Parameter Basis</td>
<td>Post SQL Bind</td>
</tr>
<tr>
<td>Basis Value</td>
<td>select batch_name from pay_batch_headers where batch_id = :BATCH</td>
</tr>
</tbody>
</table>

7. Click Save.

Add the Report Flow to the Parent Flow

1. On the Tasks tab, click Select and Add.

2. In the Search window, search for and select Submit Another Flow, and then click Done.

3. In the row for Submit Another Flow, click Edit in the menu bar and set these values to define the task you have added to generate the batch lines error report.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task</td>
<td>Run Batch Lines Report</td>
</tr>
<tr>
<td>Activity</td>
<td>Statutory</td>
</tr>
<tr>
<td>Task Group</td>
<td>Reporting</td>
</tr>
<tr>
<td>Description</td>
<td>Submit the batch lines error report for the specified batch.</td>
</tr>
</tbody>
</table>

4. Edit task parameters as follows:
b. Configure these predefined task parameters. Select a parameter and the corresponding parameter basis and basis value.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Parameter Basis</th>
<th>Basis Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flow Name</td>
<td>Constant Bind</td>
<td>The name of the flow, for example Batch Lines Report. This value is case-sensitive. Enter the name exactly.</td>
</tr>
<tr>
<td>From Flow Instance ID</td>
<td>Context Binding</td>
<td>Payroll flow</td>
</tr>
<tr>
<td>From Flow Task Instance ID</td>
<td>Context Binding</td>
<td>Payroll task</td>
</tr>
<tr>
<td>Use to Calculate Results</td>
<td>Constant Bind</td>
<td>Y</td>
</tr>
<tr>
<td>Parameter Name 1</td>
<td>Constant Bind</td>
<td>Batch Name</td>
</tr>
<tr>
<td>Parameter Value 1</td>
<td>Bind To Flow</td>
<td>Batch Name</td>
</tr>
</tbody>
</table>

c. Click Next, and optionally complete the owner and checklist information.

d. Click Next, and optionally complete the duration and notification information.

e. Click Submit.

5. Edit the task sequence as follows:

a. On the Task Sequence tab, edit these two rows to enter the flow tasks and sequence in the flow.

<table>
<thead>
<tr>
<th>Start Flow</th>
<th>Following Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transfer Batch</td>
<td>Run Batch Lines Report</td>
</tr>
<tr>
<td>Run Batch Lines Report</td>
<td>End Flow</td>
</tr>
</tbody>
</table>

b. Click Submit.

Test the Flow

1. Create and save a test batch that should cause an error. Alternatively, you can search for an existing batch that was transferred with errors using this SQL query:

   ```sql
   select * from pay_batch_headers where batch_status = 'E';
   ```

2. On the Submit a Process or Report page, select a legislative data group.

3. Select the Transfer Batch with Error Report task, and then click Next.

4. Enter a unique name for the current flow instance.

5. Enter the name of the batch with errors that you saved or queried, and then click Submit.

6. Click OK and View Checklist, and then click the Refresh icon until the Transfer Batch task shows as in progress with error.

7. View the report in the flow as follows:

   a. Select the row with the Transfer Batch task, and then select Skip Task in the Actions menu.
   b. In the row for Run Batch Lines Report, click Go to Task.
   c. In the Processes and Results section, click the name of the report.
**Value Sets in Payroll Flows**

**Introduction**

Use value sets for descriptive flexfields and control and validate the data you use in payroll flow patterns. A value set provides a dynamic list of values for an entry value.

Use the Manage Value Sets task to create a value set. Once you create a value set, it uses a SQL statement to filter values from an existing table, such as person name or number, location, legislative data group, or payroll statutory unit. You can then use the value set as a parameter to run a payroll flow. You don’t have to create and maintain a lookup type. Using value sets help maintain consistency and accuracy in your data.

Consider these points while creating value sets for payroll flows:

- Use the Module field to specify the module for which you want to create the value set. For example, you can create a value set for payroll calculations, payroll checklists, payroll flows, and so on.
- Use only the table-based type of value set for payroll flow parameters. Other value set types, such as Independent or Format Only, are not supported.
- Use Value Data Type of Character only. Value Data Type refers to the data type of the values that are filtered from the existing data and displayed on the payroll flow page.
- Enter these details while creating the value set definition, to build a query for the value set:
  - The From Clause defines the table name used for the query.
  - The Value Column Name is the attribute which is visible on the screen.
  - ID Column Name is the attribute used to store the value in the back end. The Column Type and Column Length pertain to the column in the database that stores the entered values.
- Put the respective parameter name as bind value in the Where Clause when creating a value set for a flow parameter which is dependent upon another parameter value. For example, if the location parameter is dependent upon the payroll flow parameter while flow submission, bind the payroll flow ID value to the Where Clause as given below:
  - Pf_flow_id = {PARAMETER.LOCATION_IP}, where LOCATION_IP is the value name.

Value sets give you the flexibility to create your own list of values, without depending on other teams.

**Related Topics**

- Overview of Value Sets

**Use a Value Set in a Payroll Flow**

In this example you create a value set and use the input values for location name as an entry value for a flow. Use the location parameter when you run the custom flow to generate multiple reports in a sequence. Use the search option on the parameter to select an appropriate value.
Create a Value Set that Returns all Locations

Let’s look at the steps to create a value set that returns all locations.

1. Select the Manage Value Sets task in the Setup and Maintenance work area.
2. On the Manage Value Sets page, click **Create**.
3. Enter these values.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value Set Code</td>
<td>LOCATION_VS</td>
</tr>
<tr>
<td>Description</td>
<td>Locations</td>
</tr>
<tr>
<td>Module</td>
<td>Payroll Flows</td>
</tr>
<tr>
<td>Validation Type</td>
<td>Table</td>
</tr>
<tr>
<td>Value Data Type</td>
<td>Character</td>
</tr>
<tr>
<td>FROM Clause</td>
<td>pay_. flows_pf</td>
</tr>
<tr>
<td>Value Column Name</td>
<td>pft.flow_name</td>
</tr>
<tr>
<td>Value Column Type</td>
<td>VARCHAR2</td>
</tr>
<tr>
<td>Value Column Length</td>
<td>100</td>
</tr>
<tr>
<td>ID Column Name</td>
<td>pf.base_. flow_id</td>
</tr>
<tr>
<td>ID Column Type</td>
<td>Number</td>
</tr>
<tr>
<td>ID Column Length</td>
<td>18</td>
</tr>
<tr>
<td>WHERE Clause</td>
<td>Pf_.flow_. id = {PARAMETER. LOCATIONIP}</td>
</tr>
</tbody>
</table>

**Note:** LOCATION_IP is the input value name.

4. Optionally, to secure the value set, select the **Data Security** check box and provide the Data Security Resource Name.
   Note: You can enable data security only if the value set is based on a single table or view.
5. Click **Save**.
Add the Value Set Codes to the Manage Flow Patterns Page

Let's look at the steps to add the value set codes to the Manage Flow Patterns page:

1. Form the Payroll Checklist work area click the Manage Flow Patterns task.
2. Create a new custom flow to meet your requirements, add the required tasks, and arrange their sequence. Use the flow parameters to submit and complete the tasks in the flow pattern, or as a basis for deriving values to submit the remaining tasks in the flow pattern.
3. Select the Parameters tab, and click Create, and create an empty parameter.
4. Select the new parameter and click Edit and add these parameter details.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Format</td>
<td>Value Set</td>
</tr>
<tr>
<td>Lookup</td>
<td>Enter the Value Set Name, LOCATION_VS, in this example.</td>
</tr>
</tbody>
</table>

5. Optionally, enter Owner and Checklist information, and then click Next.
6. Click Submit.

When you run the custom flow, the Location parameter renders as a smart list of values. You can use the search option to select a location.

Multiple Instance of a Flow

Introduction

Use the Submit Another Task to repeat a task instance multiple times. For example, you can schedule the Archive End-of-Year Payroll Results task for multiple payroll statutory units (PSUs) within the organization. You can initiate and submit the task for a single PSU and make the task repeat itself for each subsequent PSU. The number of iterations you specify, determines the number of times the task repeats itself.

Use the Manage Payroll Flow Pattern task from the Payroll Checklist work area to create a flow pattern that includes the task, Submit Another Task. Submit Another Task takes the task name as the input parameter and uses the repeat formula to execute multiple submissions of a task. The formula controls the repetition logic and execution of the task.

Before you begin, consider these points.

Task Name
This is the name of the task that is submitted multiple times. The Submit Another task takes this parameter as an input parameter.

Task Repeat Formula
The Task Repeat Formula is a prerequisite for this flow and it decides the repetition logic and drives the iteration. When you create the repeat formula, use the ‘Task Repeat’ formula type. The input parameters are predefined for an input task. You can add them as flow parameters during flow creation. The formula return values are used to validate the task parameters.
Parameters

Task parameters submit the information required for the task submissions to complete successfully. The flow has these two sets of parameters:

- Parameters for Submit Another Task
- Parameters for the repeat submission task that is submitted multiple times

You can specify the parameters for Submit Another Task as flow task parameters while defining the flow pattern.

The input values for the repeat submission task are either one of these:

- Task parameters from the flow parameters defined while creating the flow
- Return parameters from the repeat formula

Flow parameter values are used as the task parameters in either one of these options:

- If the task parameter name matches the Base Flow Parameter Name, exposed in the UI at the flow-level, then the values are used directly.
- If the task parameter names do not match the Base Flow Parameter Name, the application uses a fast formula function to pass the flow parameter values as the task parameters. This formula function is built into the repeat formula.

For example, assume that you have defined the flow parameter as 'Effective Date', and the corresponding Base Flow Parameter Name is 'EFFECTIVE DATE'. The application uses formula function `GET_FLOW_PARAM_VALUE()` and stores the return value of this formula function in the task parameter 'EFFECTIVE DATE'. The formula function is:

- \*EFFECTIVE DATE=GET_FLOW_PARAM_VALUE('Effective Date')

Provide the correct parameter basis when you define the task parameters. Some of the static parameters like the Effective Date or the Start Date can have a parameter basis value of 'Bind to Flow'. The dynamic parameters like the Payroll Statutory Unit ID are derived from the database tables. Hence you can have a parameter basis value of 'Bind to Flow Task' or 'Context Binding'. If you have defined specific names for the flow task parameters, you must ensure that the same names are used in the repeat formula.

Alternatively, use the return parameters from the repeat formula as the task parameters. In this case the input parameters for the repeat formula are only the Base Task Name and the Repeat Counter. While calling the formula, the application uses these two parameters to get the context of the job submission. You create the Repeat formula to return input values for the submission task.

The formula output Repeat Flow decides if another job submission has to be done.

These parameters can be static or dynamic parameters. For example, for the Archive End-of-Year Payroll Results process the following parameters are defined as static parameters:

- Effective Date
- Start Date
- Tax Year Date
- Repeat Counter
  - The Repeat Counter is a static variable and is maintained by the application. During the iteration process this parameter increments by '1' after every submission.

In this example, these are the dynamic parameters for each submission:

- Payroll Statutory Unit ID
• Repeat Flow

However, you can also define the Tax Year as a dynamic parameter, so that you can generate the report for various years.

Maximum Repeat Counter
Specify a threshold limit of the maximum number of instances that can be executed for a single submission of the task. If the iteration runs into an error, this parameter prevents the process from getting into an infinite loop. A repeat counter N indicates one parent and N-1 child submissions.

Repeat Flow Parameter
The repeat flow parameter indicates when the task iteration should stop. A repeat flow instance is submitted only if the repeat flow parameter is set to ‘Y’.

Execute in Parallel
Execute the submissions in parallel or serial. For parallel submissions, the number of threads is taken into consideration. A number of submissions equivalent to the number of threads is submitted in parallel. For serial submissions, number of submissions equivalent to the Repeat Counter is executed one after the other.

If you have set the Execute in Parallel parameter to ‘Yes’, you must specify a value for the Maximum Parallel Threads. This parameter is taken into consideration for a parallel submission.

For example, if you specify a value of X, during a submission, the application processes X instances of the task initially. The parent task waits for X child submissions to complete, evaluates the fast formula and executes another set of X child submissions to complete. This cycle continues till the Maximum Repeat Counter submissions are completed or the Repeat Flow value is ‘N’.

Parent Log File
After completion of the flow, use the ESS Log file to view the details of the input parameters for each job submission. The log displays one set of flow instance details and parameter values for the parent submission and similar set of values for each subsequent child submission.

Generate Archive End-of-Year Payroll Results Process for Multiple PSUs
In this example you create a flow pattern using Submit Another Task and generate the Archive End-of-Year (EOY) report. You generate the report for multiple payroll statutory units (PSUs) within your organization. Use the Archive EOY Payroll Results task to retrieve employee and employer information and employee balances in a given year for year-end reporting.

Use the Manage Payroll Flow Pattern task from the Payroll Checklist work area to create a flow pattern that also includes the task, Submit Another Task.

Before You Start
Review and validate the year-end data and complete balance adjustments and balance feeds for year-end reporting.

Here are the key decisions for this example.

<table>
<thead>
<tr>
<th>Decisions to Consider</th>
<th>In This Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is the start date of the report?</td>
<td>January 01, 2011</td>
</tr>
</tbody>
</table>
## Decisions to Consider

<table>
<thead>
<tr>
<th>Question</th>
<th>In This Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is the effective date of the report?</td>
<td>January 01, 2012</td>
</tr>
<tr>
<td>What is the tax year date?</td>
<td>January 01, 2011</td>
</tr>
<tr>
<td>What is the repeat formula name?</td>
<td>Sample Formula</td>
</tr>
<tr>
<td>Is this report confined to a single legislative data group (LDG)?</td>
<td>No. The report can be used globally for any LDG in the organization.</td>
</tr>
<tr>
<td>What are the static flow parameters?</td>
<td>Effective Date, Start Date, Tax Year Date, Repeat Counter</td>
</tr>
<tr>
<td>What are the dynamic parameters?</td>
<td>Payroll Statutory Unit ID and the Repeat Flow</td>
</tr>
</tbody>
</table>

The input parameters for the repeat submissions are obtained from the repeat formula returns. Perform these tasks to use Submit Another Task and generate the Archive End-of-Year (EOY) report for multiple PSUs.

1. Create a repeat formula
2. Create a flow pattern
3. Submit the flow
4. View the results and log file

### Create a Repeat Formula

Use the text editor to create a fast formula and return the values required to run the Archive EOY Results for a PSU. This formula is not specific to any legislative data group (LDG) and the formula type you use for this formula is Task Repeat.

Complete these steps to create a repeat formula.

1. Use the Manage Fast Formulas task in the Payroll Calculations work area.
2. On the Manage Fast Formulas page, click **Create** to create a formula.
3. On the Create Fast Formula, complete these fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Formula Name</td>
<td>Sample Formula</td>
</tr>
<tr>
<td>Formula Type</td>
<td>Repeat Task</td>
</tr>
<tr>
<td>Description</td>
<td>Archive EOY Results for each PSU</td>
</tr>
<tr>
<td>Effective Start Date</td>
<td>January 01, 2011</td>
</tr>
</tbody>
</table>

4. Click **Continue**.
5. Enter this formula text details in the Formula Text Section.

   FORMULA NAME: Sample Formula
   FORMULA TYPE: Flow Schedule
DESCRIPTION: Formula to iterate the EOY Archiver
Formula Results: Iterates the EOY and generates the report
/* Inputs */
INPUTS ARE REPEAT_COUNTER, BASE_TASK_NAME (text)
REPEATFLOW = 'N'
START_DATE = '2011-01-01'
EFFECTIVE_DATE = '2012-01-01'
TAX_YEAR_DATE = '2011-01-01'

/* FORMULA BODY */
IF REPEAT_COUNTER= 1
THEN(PAYROLL_STATUTORY_UNIT = 300100001794785
    REPEATFLOW = 'Y')
IF REPEAT_COUNTER= 2
THEN(PAYROLL_STATUTORY_UNIT = 300100002950763
    REPEATFLOW = 'Y')
IF REPEAT_COUNTER= 3
THEN(PAYROLL_STATUTORY_UNIT = 300100013071724
    REPEATFLOW = 'Y')
IF REPEAT_COUNTER= 4
THEN(PAYROLL_STATUTORY_UNIT = 300100007796226
    REPEATFLOW = 'N')

/*Results*/
RETURN START_DATE, EFFECTIVE_DATE, TAX_YEAR_DATE, PAYROLL_STATUTORY_UNIT, REPEAT_COUNTER, REPEATFLOW
/* End Formula Text */

6. Click Compile.
7. Click Save.

Create a Flow Pattern

Complete these steps to create a flow pattern.

1. Select the Manage Payroll Flow Patterns task in the Payroll Checklist work area.
2. Click Create to create a flow pattern. You can also search for and select an existing flow pattern to copy.
3. Leave the Legislative Data Group field blank and click Continue.
4. On the Basic Information page, complete these basic flow information fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flow Pattern Name</td>
<td>EOY Results Flow</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description for the flow.</td>
</tr>
<tr>
<td>LDG Required</td>
<td>No</td>
</tr>
<tr>
<td>Activities to Include</td>
<td>Select two options, Statutory and Calculate.</td>
</tr>
</tbody>
</table>

5. Select Submit Another Task to include it in the flow pattern. The activity associated with the task determines the work area where you can submit the flow.
6. On the Task Sequence page, reorder, add, or delete tasks as required.
7. Specify the order in which the tasks display in the checklist. You can specify a value for the sequence on the Edit Task Details Owners and Checklist page.
8. On the Parameters page, select Create.
9. On the Select and Add: Parameters page, add these parameters to complete the flow pattern.
Oracle Human Resources Cloud: Using Payroll Flows

Chapter 2
Payroll Flow Patterns

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Task</th>
<th>Display</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task Name</td>
<td>Name of the task</td>
<td>Submit Another Task</td>
<td>Required</td>
</tr>
<tr>
<td>Task Repeat Formula</td>
<td>Name of the formula</td>
<td>Submit Another Task</td>
<td>Required</td>
</tr>
<tr>
<td>Maximum Repeat Counter</td>
<td>Maximum number of submissions</td>
<td>Submit Another Task</td>
<td>Required</td>
</tr>
<tr>
<td>Execute in Parallel</td>
<td>Decides if the submissions are in parallel or sequential</td>
<td>Submit Another Task</td>
<td>Yes</td>
</tr>
<tr>
<td>Maximum Parallel Threads</td>
<td>Maximum number of submissions executed in parallel</td>
<td>Submit Another Task</td>
<td>Yes</td>
</tr>
</tbody>
</table>

The flow parameters are used to submit and complete the tasks in the flow pattern, or as a basis for deriving values to submit the remaining tasks in the flow pattern.

10. After you have completed the requisite parameters, click **OK**.
11. On the Task Parameters page, review the parameters, and if necessary update the parameters.
12. Review the resulting checklist for the flow pattern before submitting the flow pattern.
13. Click **Submit**.

Submit the Flow

Complete these steps to submit the newly created flow pattern.

1. Select the Submit a Payroll Flow task in the Payroll Checklist work area.
2. Search for EOY Results Flow and click **Next**.
3. Enter these parameters.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payroll Flow</td>
<td>Enter a payroll flow name.</td>
</tr>
<tr>
<td>Task Name</td>
<td>Archive End-of-Year Payroll Results</td>
</tr>
<tr>
<td>Task Repeat Formula</td>
<td>Archive EOY Results Repeat Formula</td>
</tr>
<tr>
<td>Maximum Repeat Counter</td>
<td>10</td>
</tr>
<tr>
<td>Execute in Parallel</td>
<td>Yes</td>
</tr>
<tr>
<td>Maximum Parallel Threads</td>
<td>3</td>
</tr>
</tbody>
</table>

4. Click **Next**. Check the flow interaction.
5. Click **Next** and select the schedule. You can select ‘As Soon As Possible’ to execute the task immediately.
6. Click **Review** to review the parameters.
7. Click **Submit**.
8. Click **Done**.

**View the Results and Log File**

To access the archive results after the process is submitted:

1. From the Confirmation page, click **OK and View Checklist**.
2. Click **Go to Task**.
3. Click the **Processes and Results** tab.
4. Click **View Results**.
5. Highlight a process row to view the results of a specific process.
6. Click the **View Output** icon to view the output of the process.
7. Click **Log** to view the process log.
   The log file shows details of each submission. You can also use the View Payroll Process Results task in the Payroll Checklist work area to view the process results.

**FAQs**

**Can I skip the flow parameters for a single-task payroll flow pattern?**

No, you must specify flow parameters required to successfully complete the task. Typically, these parameters include the mandatory task action parameters. You can also specify optional parameters that serve to restrict the results of the flow.

**How can I improve performance and troubleshoot flows?**

Add parameters to a payroll process configuration group to optimize performance and troubleshoot your payroll processes. To process large volumes of records, use the Threads and Chunk Size parameters. To troubleshoot processes, add the Logging Category or Formula Execution Logging parameters to a configuration group and rerun the process using that configuration group. Using these parameters enables you to investigate formula code problems.

**Related Topics**

- Payroll Process Configuration Groups
- Payroll Process Configuration Parameters

**What happens if I don't enter a task owner in a flow pattern?**

The person who submits the flow becomes the flow owner and the task owner. The person's security privileges determine whether the person can submit the flow.
Why can't I act on a task on a checklist?

Confirm whether your data role is based on a job role or abstract role that includes the functional privileges required to perform the task. Before reassigning this task to another person, ensure the data role for the new task owner also includes these privileges.

How can I identify the payroll flow that includes a specific element for an employee?

Submit the Element Results Register report, which displays the name of the payroll flow. The report shows details for the element and the value paid to the employee. If you don't know the person's assigned payroll, query the person's payroll details on the Manage Payroll Relationships page.
# 3 Edit Flows

## How Flow Patterns are Edited

You can create or copy a flow pattern and then edit add, delete, or move a task in the flow pattern. This topic provides examples of edits you can perform to tasks in a flow pattern or checklist.

Perform these edits on the Task Sequence tab of the Manage Payroll Flow Patterns page. For payroll flow patterns, use the Manage Payroll Flow Patterns task in the Payroll Checklist work area. For extract flow patterns, use the Refine Extracts task in the Data Exchange work area.

### Edit Tasks

Here's a list of examples of edits you can perform and the probable impact the edits can have on the flow.

<table>
<thead>
<tr>
<th>Edits</th>
<th>Impact</th>
<th>Examples</th>
</tr>
</thead>
</table>
| Add a task                                 | You add a task to position it as the last task in the activity or task group. Update the task sequence.  
If you repeat a task, rename it to make clear its purpose on the checklist. | You add a manual verification task after each report. You rename each task with the report name. |
| Delete a task                              | When you delete a task you may impact subsequent tasks in the flow that depend on its results. Review the subsequent tasks. | You delete a task. The Parameter Basis of the next task is Bind to Task and its Basis Value is the value of the deleted task. You update the Parameter Basis of the subsequent task as required, for example, to Bind to Flow. |
| Move a task to a different activity        | The activity determines the work areas where you can submit the flow patterns you define, and controls how the checklist displays. | You move a task in a payroll flow pattern for a report from the Payments activity to the Statutory activity. The flow owner can view the report results from the Payroll Checklist or Regulatory and Tax Reporting work areas, but not the Payment Distribution work area. |
| Reorder the list of tasks displayed in a checklist | The sequence specified for the task further determines the task order within an activity on the checklist. | You decide to flatten the checklist sequence to group all the tasks within a single activity.  
1. On the Tasks page, you confirm that each task belongs to the same activity and task group.  
2. You edit each task, specifying a value in the Sequence column on the Edit Task Details Owners and Details page. The lowest number is used for the first task in the checklist. For example, you might specify a sequence of 10 for the... |
Examples of Editing Flow Patterns

Review these scenarios to understand how you can edit flow patterns to meet the requirements of your enterprise. Use the Manage Payroll Flow Pattern task in the Payroll Checklist work area or the Refine Extracts task in the Data Exchange work area to edit these scenarios.

Update a Parameter to Use a Specified Value

Your payrolls use a single process configuration group named InFusion Consolidation Group A. You want to specify a constant for the configuration group task action parameter and hide the parameter to avoid data entry mistakes. Perform these steps.

1. Query the flow pattern you defined for the payroll cycle.

Enter these values to maintain a constant value for the Process Configuration Group task action parameter and avoid data entry mistakes.

<table>
<thead>
<tr>
<th>Parameter Detail</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display</td>
<td>No</td>
</tr>
<tr>
<td>Display Format</td>
<td>Text</td>
</tr>
<tr>
<td>Lookup</td>
<td>No value</td>
</tr>
<tr>
<td>Usage</td>
<td>Input Parameter</td>
</tr>
<tr>
<td>Parameter Basis</td>
<td>Constant Bind</td>
</tr>
<tr>
<td>Basis Value</td>
<td>InFusion Configuration Group A</td>
</tr>
</tbody>
</table>

Supply a Reason for a Corrective Action

Your enterprise typically issues electronic funds transfer payments. You defined a flow pattern to issue check payments and you want to verify and track the reason managers issue checks. You can add a flow parameter to capture that information.

1. Query the payments flow pattern you defined.
2. On the Parameters tab of the Manage Payroll Flow Pattern page, Select and Add the Reason parameter to include the parameter as a flow submission parameter. Enter these details.

<table>
<thead>
<tr>
<th>Parameter Detail</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display</td>
<td>Yes</td>
</tr>
<tr>
<td>Display Format</td>
<td>Text</td>
</tr>
<tr>
<td>Lookup</td>
<td>No value</td>
</tr>
<tr>
<td>Usage</td>
<td>Input Parameter</td>
</tr>
<tr>
<td>Parameter Basis</td>
<td>Context Binding</td>
</tr>
<tr>
<td>Basis Value</td>
<td>Payroll Flow</td>
</tr>
</tbody>
</table>

Add Tasks and Reorder the Task Sequence

Your flow pattern includes the Calculate Gross Earnings process and the Element Results Register Report. Perform these steps to run the two extract reports concurrently, and add a verification task, to simplify the checklist to a single list.

1. From the Data Exchange work area, select the **Refine Extracts** task.
2. On the Refine HCM Extracts page, query the flow pattern.
3. On the Tasks tab of the Manage Payroll Flow Patterns page:
   a. Add the first extract report, specifying the same Activity and Task Group as the Calculate Gross Earnings.
   b. Add the second extract report, specifying the same Activity and Task Group as the Calculate Cross Earnings.
   c. Add a manual verification task, specifying the same Activity and Task Group as the Calculate Cross Earnings.
4. Edit each task, specifying a sequence number on the Edit Task Details Owners and Details page.

The lowest number is used for the first task in the checklist. For example, you might specify a sequence of:

- 10 for the Calculate Gross Earnings task
- 20 for the first extract report
- 30 for the second extract report
- 40 for the manual verification task

5. On the Tasks Sequence tab, reorder the sequence of reporting tasks in this order to run the two reports concurrently.

<table>
<thead>
<tr>
<th>Task</th>
<th>Following Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Flow</td>
<td>Calculate Gross Earnings</td>
</tr>
<tr>
<td>Calculate Gross Earnings</td>
<td>First extract report</td>
</tr>
</tbody>
</table>
Automatically Increment Dates in the Scheduled Extract

You create a flow pattern to extract weekly payroll data that requires the user to enter a process date parameter. You schedule the extract to run weekly. The application evaluates the flow parameters at the time of submission, and the task parameters at the beginning of task execution. You edit the task parameters to automatically increment the date field. The date values are derived from the default date parameter values.

You use the Refine Extracts task from the Data Exchange work area, or the manage Flow Patterns task from the checklist work area. Perform these actions to edit the task parameters on the task’s Basic Information page.

1. Select the Process Date parameter.
2. Select Context binding from the Parameter Basis field.
3. Select System Date from the Basis Value field.

Edit a Flow Pattern

This example demonstrates how you can copy the predefined QuickPay flow pattern and edit the flow pattern. The edits include these changes to the copied QuickPay flow pattern:

- Designate a person with Payroll Manager Operations role as the task owner for the Verify Prepayment Results task. The task owner reviews the prepayments results before generating the payments.
- Schedule the verification task to start two days before the process date for the Generate Check Payments task starts. You notify the owner that verification starts before the next task should begin.

**Note:** In this example, the process date is the date paid.

Before you start, create a QuickPay flow pattern by copying the predefined QuickPay flow pattern, entering a name for the flow pattern and selecting a legislative data group.

Let’s look at the steps to specify a task owner for the Verify Prepayment Results task.

1. In the Payroll Checklist work area, click the Manage Payroll Flow Patterns task from the task pane.
2. On the Manage Payroll Flow Patterns page, search for the QuickPay flow pattern that you created, and edit the flow pattern.
3. On the Tasks tab, select the Verify Prepayment Results task, and click **Edit Task**.

4. On the Edit Task Details: Owner and Checklist page, select the **Payroll Manager Operations** role as the checklist owner.

5. On the Edit Task Details: Duration and Notifications page, in the Duration region, enter these values.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>Process Date</td>
</tr>
<tr>
<td>Offset</td>
<td>-2</td>
</tr>
</tbody>
</table>

6. In the Notifications region, select the **Flow Task Start Notification** option.

7. Click **Submit**, and return to the Manage Payroll Flow Patterns page.

8. On the Manage Payroll Flow Patterns page, click **Submit**.

---

### Updating Delivered Flow Patterns

You can directly edit payroll flows to incorporate changes to certain components of the flow in the context of a specific legislative data group (LDG). To configure the flow to your specific requirements, you no longer have to copy a predefined flow, edit, and rename the flow.

Use the Manage Payroll Flow Patterns task from the Payroll Calculation work area and select an LDG and search for a flow. You can only edit predefined flows. You can only make specific changes to the flow.

You can only edit a parameter and not add a parameter. For example, you may want to change the name of a parameter in the context of an LDG, or change how a flow task parameter is derived. With this enhancement you can make minimal changes to the flow, in the context of a specific LDG, and the changes take effect only if you submit the flow during runtime. For example, if you have made changes and saved the revised flow for LDG A, you cannot submit the flow for LDG B. You can submit the flow only for LDG A. If you submit the flow for some other LDG, the flow runtime ignores the changes.

If you want to make more detailed changes, copy, rename, and edit the flow.

### Edits Allowed on a Flow

You can make changes to the following components in a flow on the Manage Payroll Flow Patterns page.

- **Flow Details**
  - Flow Description
  - Flow Status

- **Flow Parameters**
  - Flow Parameter Name
  - Display
  - Display Format
  - Lookup
  - Sequence
Oracle Human Resources Cloud:
Using Payroll Flows

Chapter 3
Edit Flows

- Parameter Basis
- Basis Value
- Description

- Flow Task Parameter
  - Parameter Basis
  - Basis Value

- Owner and Checklist
  - Owner Type
  - Owner
  - Sequence

- Notifications
  - Flow Start Notification
  - Flow End Notification
  - Warning Notification
  - Error

You cannot make any changes to Flow Task Sequence, Review UI, and Submit Related Flows.

Delete the Edits

The changes you make are not overridden when Oracle delivers a new version of the flow. The changes you make for a given LDG holds good, until you delete or modify them.

Select Edit and use the Delete option at the record level to undo changes you have made to a record. When you delete a revision at the record level, you see a message indicating that the changes to the record are marked for deletion. The revisions are deleted when you save the flow.

At the flow level, you can use the Remove All Updates option to undo all the changes you have made to the flow.

Add a BI Publisher Report to a Flow

Add single or multiple BI Publisher reports to your copied or user-defined flow pattern. When you submit the flow, the report automatically generates an output file that you can view. The output file is based on the template used for the BI Publisher report, such as an html template. The Run BI Publisher Report task belongs to the Statutory activities in the flow pattern.

Add Your Report to a Flow

Follow these steps to add the BI Publisher report to an existing extract flow.

1. Use the Manage Flow Patterns task in the Payroll Checklist work area or the Refine Extracts task in the Data Exchange work area.
2. Search and select the flow that you want to configure.
4. Click **Select and Add** on the menu bar. In the Search Tasks dialog, search for and select Run BI Publisher Report. Click **Done**.

5. On the Task Sequence page, confirm the sequence is correct.

6. On the Flow Parameters page, add a required parameter for the first argument of the BI Publisher report.

   The flow parameters map to the BI Publisher arguments. For example, if your report is based on a SQL query, the first argument is the first bind variable of a SQL query data model.

   **Tip:** To easily determine the sequence of arguments, view the list of parameters for the generated report in BI Publisher.

7. Optionally, rename the parameter to a more meaningful name.

8. On the Task parameters page, in the Parameter Details section, complete these steps:

   a. Confirm that the Parameter Basis for the First Argument value is Bind to Flow.

   b. Specify a value for the Report Name and Report Path parameters.

      For example, if the BI Publisher data model is saved to the Custom folder in Shared Folders you would specify /Custom/yourBIreport.xdo.

   c. Specify values for other arguments if required.

9. Review the flow and submit it.

### Add an Individual Flow Task within a Checklist

Use the Submit Another Task option from the Actions Menu in the checklist to add an individual flow task to a flow that’s ‘In Process’.

You can submit a task that’s initially not included in the checklist. For instance, you’re analyzing the payroll run and require additional information about pay elements included in the run. You can run an additional deduction report that’s not in the initial flow.

Use the Submit Another Task option from the Actions Menu, and select any process or flow pattern and submit it.

After you select the task, select or modify the parameters presented to you. The list of parameters are the task parameters inherited from the task you have selected. The parameters are prepopulated with the entries you have made in the main flow. You can retain the same values and add new parameters or change the values of existing parameters as required.

After you submit the task, you can view the task in the Linked Region of the checklist. After you submit the task, you can either:

- Stay in the existing checklist, or
- Click **Go to Checklist** and access the checklist of the task you have just submitted. To return to the original flow, go to the related flows section and select the original flow. From here you can see the task you previously submitted in the Related Flows section. Click the task to view the checklist of the task.

### FAQs
Can I edit a predefined flow pattern?

You can only edit payroll flow patterns that you copy or create. You can’t edit predefined flow patterns. For example, you might copy a predefined flow pattern and configure it to your requirements, such as adding a report extract you defined, or displaying additional flow parameters. You can create a new flow pattern that includes only the tasks you perform during a specific phase of the payroll cycle, such as the end of an accounting period or at the end of a quarter.

How can I rearrange tasks in a flow pattern?

Every flow pattern begins with a Start Flow task, which doesn't belong to an Activity or Task Group, and concludes with an End Flow task. Edit the task sequence by selecting a different task in the Following Task column.

When you create a flow, use the Task Sequence page to rearrange the tasks. When you edit a flow, select the task and edit its sequence on the Create Flow Pattern: Basic Information page. When you submit a flow, processes in the flow use and build upon the results of the previous processes. To maintain data integrity, ensure the sequenced tasks follow a consecutive order.
4  Schedule Flows

Introduction

Schedule a flow to automatically submit the flow at a date, frequency, and time span that suits your business practices. Here’s what you can do with flow schedules:

• Create a schedule
• Submit the next occurrence of the flow
• Connect active flows
• Monitor the status of scheduled flows
• Troubleshoot issues with flow schedules or individual tasks
• Cancel scheduled flows

Use predefined frequencies or formulas to schedule a flow to run once or on a recurring basis. For example, schedule a process to run on weekdays but not on weekends. Or, schedule a flow to submit an extract that reports extract update details on a daily basis.

Create Schedules for Flows

Here are some examples of scheduling options and parameters you can set while creating schedules for flows.

<table>
<thead>
<tr>
<th>Scheduling Options</th>
<th>Parameters to Set</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submit the current flow only</td>
<td>• Date</td>
<td>Schedule a process that transfers time card entries for a weekly payroll.</td>
</tr>
<tr>
<td></td>
<td>• Optionally, time</td>
<td></td>
</tr>
<tr>
<td>Submit the current flow and future</td>
<td>• Frequency details or formula</td>
<td>To optimize processing, schedule an archive process to start after normal working hours.</td>
</tr>
<tr>
<td>occurrences</td>
<td>• Start date and time</td>
<td>However, the processing must end before the start of the nightly process to back up the</td>
</tr>
<tr>
<td></td>
<td></td>
<td>enterprise’s servers.</td>
</tr>
<tr>
<td>Restrict the period during which the</td>
<td>End Date</td>
<td>Specify an end date for a scheduled statutory report that the government no longer requires</td>
</tr>
<tr>
<td>flow recurs</td>
<td></td>
<td>you to submit.</td>
</tr>
</tbody>
</table>

Submit the Next Flow Occurrence

When the application submits the next occurrence of a flow at the scheduled time, it performs these tasks:

• Uses the parameters specified in the original flow
• Resets the dates appropriately, using the system date for the submission date
• Increments parameters derived from the date parameter for predefined flows
For example, if you schedule a gross-to-net report to run monthly for a monthly payroll, the application uses these parameters and increments the process end date.

- Payroll Name
- Payroll Statutory Unit
- Consolidation Group

The submitted report covers the payroll period that corresponds to the incremented end date.

For user-defined flows, to automatically increment the date, specify these parameters for the effective date parameter in the flow pattern.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basis</td>
<td>Context Binding</td>
</tr>
<tr>
<td>Basis Value</td>
<td>System Date</td>
</tr>
</tbody>
</table>

The flow pattern can be for the process, extract, or report.

For example, define a flow pattern to extract weekly payroll data that requires you to enter a process date parameter. Use the Refine Extracts task and edit these task parameters on the task's Basic Information page:

1. Select the Process Date parameter.
2. Select Context Binding for the parameter basis.
3. Select System Date for the basis value.

These settings ensure that the dates increment appropriately.

Connect Active Flows

When you submit a scheduled flow, you can connect it to other active flows. The scheduled flow interacts with the active flow, but only for the first occurrence, not future occurrences.

Monitor the Status of Scheduled Flows

A schedule icon identifies the status of scheduled flows that have not yet started. As soon as the current flow starts, the application lists the next occurrence on the Overview page of the appropriate work areas. For example, if you schedule a report to verify payroll calculations, the scheduled flow displays in the Checklist and Payroll Calculation work areas.

Troubleshoot Scheduled Flows

When there is an application server failure, the flow instance ends. You must resubmit the flow once the server resumes. You don’t have to reschedule the recurring flows scheduled to run at a later date.

Cancel Scheduled Flows

You can cancel a scheduled flow depending on the frequency and status of the flow, as given here.
## Schedule Flows

### Frequency

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Status</th>
<th>Available Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Once</td>
<td>Started</td>
<td>Skip</td>
</tr>
<tr>
<td>Once</td>
<td>Not Started</td>
<td>Cancel flow</td>
</tr>
<tr>
<td>Recurring</td>
<td>Not Started</td>
<td>Cancel the current flow, cancel the recurring flow, or cancel the current and recurring flows</td>
</tr>
</tbody>
</table>

### Flow Task Start Dates and Due Dates

Use duration dates and notification options in the payroll flow pattern to give flow owners adequate time before a task starts, to prepare and address any issues.

#### Task Start and Due Dates

Let’s look at the duration dates you can enter on the Tasks page of the Manage Payroll Flow Patterns page:

- **Start date**, the date the task owner should start the task.

  > **Note:** The start date applies to notifications only. Enter the flow start date on the Scheduling page when you schedule the flow.

- **Due date**, the date the task owner should complete the task.

To specify duration dates:

1. Select the flow parameter date to use as the basis for the duration date.
2. Optionally, offset the date by specifying a plus or minus value depending on whether the date falls before or after the duration date.

#### Notifications

Notifications are error and warning messages to inform the task owner when a task starts or ends. The receipt of notifications depends on the duration dates and their offsets.

1. Specify the notifications the task owner receives.
2. Optionally, specify the number of days before the application automatically deletes a notification from storage.

Use the Manage Payroll Process Configuration task to complete the Notification Expiration Offset parameter.

#### Flow Schedule Formula Type

Use Flow Schedule formulas to control when to submit the current flow and how often to submit future instances of the flow. You create scheduling formulas on the Manage Fast Formulas page when the predefined formulas don’t cover your requirements.
Let's say you create a formula that loads time card batches daily, and increases to four times a day at the end of a payroll period when workers typically submit their time cards. You can create a formula that schedules the frequency with which an extract process checks for new starter details.

Here are a few tips to consider when creating or updating a scheduling formula:

- Specify a meaningful name to assist the person selecting the formula.
- Review the formula to ensure it doesn’t contain negative numbers that might produce an error condition, such as running a process continually.
- After updating the formula, cancel any scheduled flows that use the formula. Resubmit the flow to apply the updated definition.

**Contexts**

The SCHEDULED_DATE (scheduled date) context is available to formula of this type.

**Database Items**

Here’s the list of database items that are available to Flow Schedule formulas.

<table>
<thead>
<tr>
<th>Database Item</th>
<th>Data Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>FF_ADD_DAYS</td>
<td>Date</td>
<td>Function to add days to a date.</td>
</tr>
<tr>
<td>FF_ADD_MONTHS</td>
<td>Date</td>
<td>Function to add months to a date.</td>
</tr>
<tr>
<td>NEXT_SCHEDULED_DATE</td>
<td>Date</td>
<td>Calculated value for the date to schedule the next flow.</td>
</tr>
<tr>
<td>SCHEDULED_DATE</td>
<td>Date</td>
<td>Date used to schedule the flow.</td>
</tr>
</tbody>
</table>

**Input Variables**

These are the input variables available to Flow Schedule formulas.

<table>
<thead>
<tr>
<th>Input Variables</th>
<th>Data Type</th>
<th>Required</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SCHEDULED_DATE(DATE)</td>
<td>Date</td>
<td>Y</td>
<td>Date on which to schedule the flow. The date is passed to the formula when it calculates the next date to schedule the flow.</td>
</tr>
</tbody>
</table>

**Return Values**

Use predefined names for return variables. These are the return values available to Flow Schedule formulas.
Sample Formula

This predefined formula schedules a flow so that it’s submitted weekly from the date the flow owner initially submitted it.

```java
/* ***************************************************************************/
FORMULA NAME: Weekly
FORMULA TYPE: Flow Schedule
DESCRIPTION: Formula to return a date time.
Returns NEXT_SCHEDULED_DATE;
Formula Results:
NEXT_SCHEDULED_DATE This is a date time value with yyyy-MM-dd HH:mm:ss format.
**************************************************************************/
/* Inputs */
INPUTS ARE SUBMISSION_DATE(DATE), SCHEDULED_DATE(DATE)
/* Calculations */
NEXT_SCHEDULED_DATE = ADD_DAYS(SCHEDULED_DATE,7)
/* Returns */
RETURN NEXT_SCHEDULED_DATE
/* End Formula Text */
```

You can calculate units smaller than a day by replacing the calculation portion of the formula text using a decimal or a fraction. Let’s look at some examples of submitting a flow several times a day.

<table>
<thead>
<tr>
<th>Flow Submission</th>
<th>Formula Text for Calculation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Twice a day</td>
<td>NEXT_SCHEDULED_DATE = ADD_DAYS(SCHEDULED_DATE, 0.5)</td>
</tr>
<tr>
<td>Hourly</td>
<td>NEXT_SCHEDULED_DATE = ADD_DAYS(SCHEDULED_DATE, 1/24)</td>
</tr>
</tbody>
</table>

**Related Topics**

- Example of Writing a Fast Formula Using Formula Text
- Date Formula Functions
- Overview of Using Formula Components

**FAQs**

How can I run tasks concurrently in a flow?

Use the Manage Payroll Flow Patterns task in the Payroll Checklist. Search for and open your flow pattern. Click the Task Sequence tab. Specify that each concurrent task follows the same previous task.
For example, you create a flow pattern with a payroll calculation task and two reports. The flow ends when both reports complete. You can use these actions to run the payroll calculation task and the two reports run concurrently.

1. For the first row, specify the Start Flow task with the Calculate Payroll as the following task.
2. For the second row, specify Calculate Payroll as the task, and the first report as the following task.
3. For the third row, specify Calculate Payroll as the task, and the second report as the following task.
4. For the fourth row, specify the first report as the task and End Flow as the following task.
5. For the last row, specify the second report as the task and End Flow as the following task.

Why don't the duration dates in the flow pattern display?

The start and end dates and their offsets display after you complete the flow parameter dates. Enter the flow parameters on the Parameters page, and then return to the Tasks page to enter the duration dates.

If your flow pattern doesn't specify dates as flow parameters, the duration list of values is blank. Change the values for the Duration list by displaying the date parameters for tasks in your flow pattern.
5 Submit and Monitor Flows

Submit Flows

Introduction

A flow is a process that you submit, such as the Calculate Gross Earnings process, the Run Balance Exception Report process, or an extract process. You can submit flows from a payroll work area or by using the Submit Extract task in the Data Exchange work area. You can schedule flows to run at a specified time or at regular intervals. Monitor the status of submitted flows from the Payroll Checklist work area or from the Data Exchange work area using the View Extracts task.

Submit a Payroll Flow

Watch: This tutorial shows you how to submit a payroll flow from the Checklist work area for a semimonthly payroll run, and how to navigate directly to the checklist to begin working on the tasks included in the flow. The content of this video is also covered in text topics.

Example of Submitting a Payroll Flow

This worked example demonstrates how you can use the Submit a Payroll Flow task and submit a payroll flow for a semimonthly payroll run. After submitting the flow, navigate directly to the checklist to monitor and control the flow tasks.

Use the Submit a Payroll Flow task from the Payroll Checklist work area to submit a payroll flow. You can configure a payroll process flow to meet your business requirements.

Submit the Payroll Flow

1. Select the Submit a Payroll Flow task.
2. On the Submit a Payroll Flow: Select Flow Pattern page, select an LDG in the legislative data group (LDG) field.
3. Select the flow pattern you want to submit.
4. Complete these mandatory fields.
   - This table lists the information required for payroll flows.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payroll Flow</td>
<td>Enter the name of the payroll flow.</td>
</tr>
</tbody>
</table>

Note: It is best practice to enter a name that includes the payroll period, so that it is easier to identify later.
Submit and Monitor Flows

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payroll Period</td>
<td>Select the payroll period for which you want to run the payroll.</td>
</tr>
<tr>
<td>Run Type</td>
<td>Regular</td>
</tr>
<tr>
<td>Start Check Number</td>
<td>10,000</td>
</tr>
</tbody>
</table>

5. Click **Next**. You can skip the Enter Flow Interaction page, because you are not going to connect this flow with another flow.
6. Click **Next**.
7. On the Schedule page, select **As soon as possible** as the Flow Submission schedule.
8. Click **Next** and review the run information before submitting the flow.
9. Click **Submit**.
10. Click **OK and View Checklist** to view the checklist and monitor the progress of the flow.

Monitor the Status of the Flow Tasks

Use the checklist to monitor the status of the flow tasks. Here's the list of items you can monitor.

- Use the Status column to view the progress of each task as:
  - Completed
  - In Progress
  - Not Started

- Use the Complete Percentage column to view the completion status of each task.

- Use the Task Type column to identify tasks as either automatic or manual. Manual tasks are shown with a person icon with a check mark. Automatic tasks are shown with spoke wheel icons. Automatic tasks begin when the task before it is complete.

If a manual task is shown as completed, click the **Task Type** icon of the task and select **Mark as Complete**. You must set the manual task as completed so that the next task can begin.

If it looks like your payroll is not running, check if you have marked the manual tasks as complete. Manual tasks work like stop points in the flow where you can verify results and perform any corrections required before continuing with the next task.

1. Expand the **Parameters** section, to see where the process is and view the task details.
2. Click the **Refresh** icon to view the updated status of the tasks on the page.
3. Click the **Go to Task** icon of the task, to view the details of a completed task.
4. Click **Done** to complete the flow.
Monitor the Status of Flow Tasks

Submit a flow and monitor the status of an entire flow and the tasks within it from the generated checklist. Review the status of a flow by checking the status icons and notifications. The task status determines what actions you can perform, such as rolling back the task.

This topic covers:

- Task status and available actions
- Notifications

Task Status and Available Actions

Flow or task owners update the status of manual tasks, and the application automatically updates the status of automatic tasks. Monitor the progress of a task by reviewing the percentage completion of the task.

The Action menu displays the actions available for a task based on its status, as shown here.

<table>
<thead>
<tr>
<th>Status on Payroll Checklist Task Details Tab</th>
<th>Status on Payroll Flow Process and Reports Tab</th>
<th>Skip</th>
<th>Roll Back</th>
<th>Mark for Retry</th>
<th>Retry</th>
<th>Submit</th>
<th>ReSubmit and Force Resubmit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Started</td>
<td>Not Started</td>
<td>x</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Not Started with Potential Errors</td>
<td>Not Started</td>
<td>x</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>x</td>
</tr>
<tr>
<td>Not Started with Errors</td>
<td>Not Started</td>
<td>x</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>x</td>
</tr>
<tr>
<td>In Progress (automatic task)</td>
<td>In Progress</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>In Progress (manual task)</td>
<td>N/A</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>In Progress with Potential Errors</td>
<td>In Progress</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>In Progress with Errors</td>
<td>Error</td>
<td>x</td>
<td>x</td>
<td>N/A</td>
<td>x</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Completed</td>
<td>Completed</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>On Hold</td>
<td>Mark for Retry</td>
<td>x</td>
<td>N/A</td>
<td>N/A</td>
<td>x</td>
<td>x</td>
<td>N/A</td>
</tr>
<tr>
<td>Rolled Back</td>
<td>Rolled Back</td>
<td>x</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>x</td>
<td>N/A</td>
</tr>
</tbody>
</table>
The actions available to you when working with a task depend on its status and the status of the tasks that precede or follow it, as given here.

<table>
<thead>
<tr>
<th>Action to Perform on Current Task</th>
<th>Status of Current Task</th>
<th>Status of Previous or Subsequent Tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roll back or retry</td>
<td>Completed</td>
<td>All subsequent task must have a status of Rolled Back or Completed</td>
</tr>
<tr>
<td>Submit</td>
<td>One of the following:</td>
<td>All previous tasks must have a status of Completed</td>
</tr>
<tr>
<td></td>
<td>• Roll Back</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• On Hold</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Mark for Retry</td>
<td></td>
</tr>
</tbody>
</table>

**Notifications**

Update the flow pattern to have notifications sent to you to remind you of upcoming tasks or to warn you of tasks that are overdue. Completing a task removes its notifications.

The setup of notifications include:

- Specifying the type of notifications and when to send them on the flow pattern
- Specifying the number of days before the application automatically deletes a notification for the Notification Expiration Offset parameter on the Manage Payroll Process Configurations page. To open this page, use the Manage Payroll Process Configuration task from Quick Actions on the Home page.

> **Note:** You receive notifications when you resubmit a task but not when you select **Force Resubmit** from the Actions menu.

**Monitor Payroll Flow Status**

**Watch:** This tutorial shows how to use the Flows in Progress region of the Payroll dashboard. It also shows how to navigate to the checklist and payroll flow page to view further details about the status and the actions that you can take. The content of this video is also covered in text topics.

**Completing, Skipping, and Correcting Flows**

When you submit an extract report or process or a flow, a checklist is generated. The checklist lists tasks sequentially; the sequence in which you perform to complete the flow.

This topic covers these aspects of working with flows:

- Complete flows
- Delete and skip flows
- Correct tasks in a flow
Complete Flows

The Tasks Details tab of the checklist lists the manual and automatic tasks required to complete the flow. Review status icons to monitor the progress of tasks.

An automatic task is complete when the application finishes it successfully and marks it complete. A manual task is complete when you mark it complete or update its progress to 100 percent. With the exception of skipped tasks, you must complete a task before you can update the status as complete.

Delete and Skip Flows

Use the Manage Payroll Flow Patterns task to delete a flow you copied or created, if you haven’t yet submitted it. You can skip an entire flow or a task in a flow if you have submitted it.

Skip tasks, if you don’t require the results when processing later tasks. If you submit a flow in error, skip the entire flow.

The details of when and who can control a flow or a flow task is given here.

<table>
<thead>
<tr>
<th>Object</th>
<th>Who Can Skip It</th>
<th>Condition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task in a flow</td>
<td>Flow or task owner</td>
<td>The task isn’t in progress.</td>
</tr>
<tr>
<td>An entire flow</td>
<td>Flow owner</td>
<td>None of the tasks are in progress.</td>
</tr>
</tbody>
</table>

Skip the flow from the Payroll Checklist work area Overview page.

Correct Tasks in a Flow

To correct records for a task, such as records in error or missing information, the actions you take in the checklist depend on whether the correction involves the current task in the checklist or a previous one.

For a current task:

1. Mark the records for retry.
2. Correct the records.
3. Resubmit the task.

Tip: If records require more investigation, avoid delaying the start of the next task by rolling back the records and processing them separately. Resubmit the task to change its status to Complete.

If you discover you must correct an earlier task, you can undo the intervening tasks, correct the data and then resubmit the tasks.

For a previous task:

1. Start with the last manual task in progress, even if it occurs in the next activity or task group.
2. Set the status of the manual task to incomplete.
   - Roll back all the records processed by the task.
   - Retry to change the status to Paused to correct and retry records processed by the task.
3. Repeat this process for each intervening task.
4. Correct the records for the task in error.
5. Resubmit the task.
If you submit separate flows, roll back or mark for retry the flows that lock the records in the current flow before you can process the correction.

For example, you have a user-defined flow that has the Calculate Payroll task after which you run the payroll and audit reports tasks. You have submitted the flow and all the tasks in the flow have completed successfully. You then discover that you have to correct some employee records for the Calculate Payroll task and resubmit the flow. Follow these steps to correct the records from the earlier run and resubmit the flow:

1. Open the Calculate Payroll task from the checklist, use the Actions menu to set some records as ‘Mark for Retry’. The status of the task changes to ‘In Progress with Error’.
2. Set the status of each sequential task in the flow as ‘Mark as Incomplete’.
3. Edit the records and then set the status of the Calculate Payroll task to ‘Mark as Complete’.
4. Resubmit the flow. The subsequent tasks run automatically.

**Note:** If you don’t complete Step 2 above, you may not see the ‘Mark as Complete’ status for the Calculate Payroll task.

## Options for Taking Corrective Tasks in a Payroll Flow Pattern

Before defining flow patterns to correct payroll run or payment results, consider whether the flow owners can correct individual records or tasks by using these options:

- Task Actions
- Predefined processes
- Predefined flows, such as the Cancel Payments flow

### Use Task Actions

Most tasks support corrective task actions at the task level or individual record level. The type of task and its status determine which corrective actions the flow owner can select from the Actions menu when viewing results.
This figure shows the task actions available from the Actions menu when you work on the Payroll Flow Checklist or the Processes and Reports tab of the payroll flow.

Here's how you can confirm whether the task includes the task actions:

1. Edit your flow pattern on the Manage Payroll Flow Pattern page of the Payroll Checklist work area.
2. Select the task on the Tasks tab, and edit it.
3. Review the Execution Mode column on the Edit Task Details: Basic Information page to confirm that the task supports the Mark for Retry, Retry, and Roll Back task actions.

Use Predefined Processes
Flow owners can use the Submit a Process or Report task from a payroll work area to submit these corrective processes:

- Roll Back Process
- Retry Payroll Process
The flow owner can use these processes to roll back or retry a flow that includes a single process and that is in progress with errors.

**Use Flow Patterns**

If your enterprise performs several tasks to correct problems, flow owners can use any of these.

- A predefined flow pattern, such as the Cancel Payment flow
  
  The Cancel Payment flow pattern includes tasks to view the person process results, void the payment, process an external payment to prevent reissue of the original payment, and reverse the original prepayment and payroll run calculations.

- A flow pattern you create, such as a flow pattern to reissue a lost check
  
  This flow pattern might include tasks to void the payment, issue an external payment, and view the person process results.

**Roll Back Errors Rule for Payroll Flows**

When there are partial errors in a payroll flow, the process goes into an error state, and you can't move ahead. You can continue with the flow only after you take corrective action on the tasks that are in error.

Use the Roll Back Errors option from the Actions menu within the checklist to roll back a process that has errors so that it proceeds to completion. The application automatically creates a payroll relationship group for the employees having errors and removes them from the process, so that the payroll proceeds to completion.

After reviewing and correcting the errors, you can use cross-flow interactions to bring back the employees into the parent flow or process them separately in a subsequent process.

Monitor the status of tasks within a flow from the checklist generated when you submit the flow. Let’s look at the steps to roll back the errors generated in a payroll process:

1. Within the checklist, select the task that has errors.
2. Select the **Roll Back Errors** option from the Actions menu within the checklist. The application displays a message that the rollback action has started. The status of the process changes from 'Error' to 'Processing'.
3. Click the **Corrective Actions** icon to open the Rollback Relationship Group window to view all the rollback actions that are initiated for your process.
   
   You can view these details on the Rollback Relationship Group window.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of the payroll relationship group that’s created.</td>
</tr>
<tr>
<td>Creation date</td>
<td>The date of the Rollback Action and the creation of the payroll relationship group.</td>
</tr>
<tr>
<td>Created by</td>
<td>The person who submitted the Rollback Errors action.</td>
</tr>
<tr>
<td>Rollback Count</td>
<td>The number of employees that are rolled back and created in the payroll relationship group.</td>
</tr>
</tbody>
</table>

4. Click the payroll relationship group **Name** to open the Manage Object Groups page and view the details of the created payroll relationship group.
5. Click **Next** to view the details of employees who are rolled back.
6. Click **Cancel** to return back to the Checklists page.
7. Use the Refresh button to refresh the page.

You notice that the status of the task that was in error changes to completed. You can perform the Roll Back Action any number of times and for each rollback action, the application creates a new payroll relation group. You can’t use the Roll Back Errors option for a completed task.

### Run a Report After a Process Errors

You can use the **Allow Processing** option in the Manage Flow Patterns UI on the Tasks tab to run a report or process after a prior process has errors.

When there are partial errors in a payroll flow, the process goes into an error state, and you can’t move ahead. You can continue with the flow only after you take corrective action on the tasks that have errors. Set the value of the **Allow Processing** column as Yes for each task in the flow that you want to run, irrespective of the status of a prior task, in the same flow or a cross flow. The tasks in the flow continue to process until it encounters a manual task or a task on the checklist that doesn’t have the **Allow Processing** value set to Yes.

For example, if the Calculate Payroll flow has a few records that have errors, you may want to run a report to study and understand the generated errors. Reports can be run either as:

- A separate task in a single flow. For example, the Calculate Payroll Flow may have a separate task to run all the reports after completion of the Calculate Payroll task. In this case, the Reports task can’t run if the Calculate Payroll task errors.
- A separate flow. For example you can have a separate flow for all the reports and you can have cross flow interaction to link this flow to the Calculate Payroll flow. Once the Calculate Payroll flow completes, it initiates the Reports flow. You can’t run the Reports flow if the Calculate Payroll flow errors.

In both of the above cases, set the **Allow Processing** option on the Reports task to Yes, so that the reports are generated, even if the Calculate Payroll task has errors. You can view the report to understand the errors and take corrective actions.

### Roll Back Multiple Tasks within a Flow

Use the Bulk Roll Back option from the **Actions** menu within the checklist to roll back multiple tasks within a flow. You don’t have to manually select each task to roll back the tasks within the flow.

Let’s say that you want to run a flow that has these five tasks:

Task A, Task B, Task C, Task D, and Task E

If you have performed tasks A, B, and C, and want to roll back all the tasks, you can use the Bulk Roll Back option from the Actions menu and roll back all the three completed tasks. You can then reprocess the tasks within the checklist.

Once the bulk roll back action is in progress, the roll back icon displays to indicate that the task is being rolled back. If the checklist has a large number of tasks and a bulk roll back action is in progress, only the activity that has tasks that are being rolled back are open, so that you know that a roll back action is in progress.

The **Last Updated** field reflects the person who took the bulk roll back action for each of the tasks. You can’t bulk roll back tasks, if:

- You don’t have access to those tasks within the flow.
• Any of the flow task instance has the **IN_PROGRESS** status.
• A bulk roll back is in progress for the current flow instance.

In all of the above cases, the **Actions** menu doesn’t display the Bulk Roll Back action.

Monitor the status of tasks within a flow from the checklist generated when you submit the flow. Complete these steps to initiate a bulk roll back action in a payroll process:

1. Within the checklist, select the task that you want to roll back.
2. Select the **Bulk Roll Back** option from the **Actions** menu within the checklist. The application displays a message that the roll back action has started. The status of the process changes to ‘Processing’.
3. Click **Next** to view the details of employees who are rolled back.
4. Click **Cancel** to return back to the **Checklists** page.
5. Use the **Refresh** button to refresh the page.

You will notice that the status of the task that was rolled back changes to completed. You can perform the **Bulk Roll Back** action any number of times.

**FAQs**

**How can I access a log file for a payroll flow, extract, or report?**

Locate and open the flow you submitted that includes the process, report, or extract. On the flow’s Process and Reports tab, click the Process link, which is listed below the task. On the Oracle Enterprise Scheduler Output page, click the View Log button for the process. In the log window, select an option to view or save the log.

**How can I cancel a scheduled flow?**

Cancel current and recurring scheduled flows that you own from the flow’s checklist. Select the appropriate menu command from the Actions menu to cancel the current flow and the recurring schedule, or the recurring schedule only.

If you can’t cancel the scheduled flow from the checklist, your system administrator can stop the job. If you based the schedule on a formula, review the formula to ensure that it contains no negative numbers. Negative numbers will produce a continuous recurring schedule.

**How can I delete a flow?**

You can delete a flow that you copied or created if you haven’t submitted it. Use the Manage Payroll Flow Patterns task to delete the flow. If you submitted a flow, you can skip the entire flow or tasks in the flow.

Payroll flow owners can also mark an entire flow as skipped from the Payroll Flow Checklist page on the Overview tab. Marking the entire flow as skipped marks any remaining uncompleted tasks as complete.
Why can't I find the flow I want to submit?

Confirm that your role grants you security access to the flow pattern, for example to an extract report or process. For payroll, confirm your role grants you security access to the payroll definition. Finally, determine whether the task or flow owner specified in the flow pattern is for your role or user name.
QuickPay Processing

Use the Calculate QuickPay task to submit a flow that calculates the run results for a person without waiting for the standard payroll run.

For example, use it to:

- Process new-hire or termination payments
- Pay people whose records you removed from the standard run for further processing
- Perform special payments
- Resolve localized problems with a payroll run that requires reprocessing

Select the Calculate QuickPay task to display the Person page. Based on the person selected and effective date used for the search, the QuickPay process displays a single page and checklist. It populates parameters, such as the person’s payroll, date earned, and flow name. You can override these parameters.

The checklist is based on the predefined QuickPay flow pattern that includes tasks for calculating payroll run results and prepayments, and processing an external payment. You can replace the default QuickPay pattern with a user-defined QuickPay flow pattern by adding your flow pattern to a user-defined table.

Process a QuickPay action using one of the methods listed here.

<table>
<thead>
<tr>
<th>Method to Use</th>
<th>Work Area</th>
<th>When to Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calculate QuickPay task</td>
<td>Payroll Calculation</td>
<td>• Process all QuickPay actions from one page using a checklist</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Automatically populate parameters based on the effective date.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Process one or more QuickPay flows</td>
</tr>
<tr>
<td>Calculate QuickPay task on the Actions menu</td>
<td>Payroll Calculation</td>
<td>Start a QuickPay process immediately after updating a person’s element entries</td>
</tr>
<tr>
<td>of the Manage Person Details search page</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submit a Payroll Flow task for the QuickPay</td>
<td>Payroll Checklist</td>
<td>Schedule a QuickPay flow</td>
</tr>
<tr>
<td>flow pattern</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Settings That Affect Processing

The parameters and settings you specify for the tasks in the QuickPay flow determine which records to retrieve and process. The QuickPay process calculates the element entries for all the assignments associated with the payroll relationship, based on the run type and settings specified.

Typical examples of settings that you might change to address different processing requirements are given here.
QuickPay Processing

This figure shows the sequence of tasks in a QuickPay flow:

1. Calculate payroll run results for the person, based on the settings you provide.
2. Verify run results on the View Person Process Results page and mark the process completed.
3. Calculate payment distribution using the Calculate QuickPay Prepayments task.

Here’s the list of tasks in sequence that occurs or you can perform after you submit the Calculate QuickPay task.

- Calculate payroll run results for the person, based on the settings you provide.
- Verify run results on the View Person Process Results page and mark the process completed.
- Calculate payment distribution using the Calculate QuickPay Prepayments task.

The calculation uses the default payment method and payment source, unless you select to override these settings in the Prepayments section.
4. Verify prepayment results in the Prepayment Results section of the View Person Process Results page and mark the process completed.

5. Issue an external or internal payment:
   - Issue an external payment by selecting Make Payment from the Action menu. Verify the payment results and mark the task completed.
   - Skip the Make External Payments task and issue an internal payment. Select the Skip Flow action for the Make External Payment task to skip the rest of the tasks in the flow and mark the flow as complete. When you're ready, run the payment process, which processes the unpaid payments from this QuickPay and any others that match the parameters you provided when you submit the process.

   For example, archive the payroll run and prepayment results, and then Make EFT Payments from the Payroll Checklist or Payment Distribution work areas.

6. Verify the payment results and mark the task as complete.

Examples of When to Run QuickPay

These examples illustrate scenarios where you might want to run a QuickPay flow using the Calculate QuickPay task in the Payroll Calculation work area.

Pay Separate Check for Employee Bonus

An employee receives a special incentive bonus, which you pay separately from the regular pay. The employee doesn't want any voluntary deductions taken from the bonus pay, such as charitable donations or retirement fund contributions. Using the Manage Element Entries task, you add the bonus to the employee’s element entries. You select Calculate QuickPay from the Actions menu, and specify the following settings:

- In the Details section, select Supplemental as the Run Type.
- In the Element Entries section, deselect element entries for all voluntary deductions.

Pay New Hire After Payroll Cutoff Date

A new hire joins the company on the 25th of the month, but the new hire process doesn't complete until the 28th. By that time, you have processed the monthly payroll and issued payments. To avoid delaying the person’s pay until the next month, you use the Calculate QuickPay task to submit a QuickPay calculation, and make an external payment. Normal processing of the employee's pay resumes with the next payroll cycle.
Pay Terminated Employee

HR terminates an employee in the middle of a payroll period. HR requests that you process and pay the person immediately. You update the employee’s payroll information. You use the Calculate QuickPay task to submit a QuickPay calculation, and make an external payment for the employee’s final pay.

Verify Bonus Payment Amounts Before Running the Main Payroll

Before processing bonus payments in the next payroll run, you want to verify the run results. You might submit a QuickPay process for a few employees and review the results, then roll back the QuickPay calculation.

1. Use the Calculate QuickPay task in the Payroll Calculation work area to submit the QuickPay process.
2. When the QuickPay calculation completes, verify the results to confirm that the bonus amount and deductions are calculated correctly. Don’t click Mark as Complete.
3. Select the verification task in the checklist. Select Roll Back from the Action menu.
4. Select the Calculate QuickPay task in the checklist. Select Roll Back from the Action menu.
5. Submit the regular payroll to recalculate this person’s run results and to generate payments.

This scenario also applies if you change an employee’s payroll information, such as adding a new deduction or updating the tax code, and want to validate the change before the next payroll run.

Related Topics

• Corrective Actions for Payments
• Examples of Correcting Payments

Working with QuickPay Flows

You can access and process your QuickPay from the payroll flow or the Calculate QuickPay page. The Calculate QuickPay page streamlines access to some tasks, such as interacting with another flow.

This topic explains how you can work with the flow from the Calculate QuickPay page.

Process Multiple QuickPay Flows and Interact with Other Flows

Here’s how you can process a QuickPay for consecutive payroll periods and how to connect a QuickPay process to another flow.

<table>
<thead>
<tr>
<th>Task</th>
<th>Action to Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>Run QuickPay flows for consecutive payroll periods</td>
<td>1. Use the Calculate QuickPay task and start a QuickPay flow.</td>
</tr>
<tr>
<td></td>
<td>2. Select Next from the Action menu to go to the next payroll period.</td>
</tr>
<tr>
<td></td>
<td>3. Complete the QuickPay flow.</td>
</tr>
<tr>
<td></td>
<td>4. Select Next from the Action menu to go to the next payroll period.</td>
</tr>
<tr>
<td>Task</td>
<td>Action to Do</td>
</tr>
<tr>
<td>------</td>
<td>-------------</td>
</tr>
<tr>
<td>5. Complete the QuickPay flow.</td>
<td></td>
</tr>
</tbody>
</table>

Interact with another flow

1. While working with a QuickPay flow, select Flow Interaction from the Action menu.
2. In the Flow Interactions dialog box, add a row.
3. Select the last task you will complete.
4. Select the destination flow.
5. Select the task in the destination flow that will continue processing the QuickPay results.
6. Select the Use to Calculate Results check box.
7. Click Ok.

**Tips to Process QuickPay**

Here’s how you can perform common tasks when working with your QuickPay flow.

<table>
<thead>
<tr>
<th>Task</th>
<th>Action to Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quit the QuickPay flow and save it</td>
<td>Click the Done or Close button.</td>
</tr>
</tbody>
</table>
| Resume work on a QuickPay flow using the checklist | You can’t resume work on the QuickPay flow using the Calculate QuickPay task. Follow these steps to resume work on the QuickPay flow:  
1. Go to the Payroll Checklist work area.  
2. On the Overview page, search for and open the QuickPay flow.  
3. Continue working with the QuickPay flow from the Task Details page. |
| Roll back tasks | Roll back each task in the checklist until you reach the task you want to roll back.  
1. Select the last incomplete manual task.  
2. Select Roll Back from the Action menu. |
| Skip a flow | 1. On the Overview page of the Payroll Checklist work area, search for and select the flow.  
2. Select Skip Flow from the Action menu. |
| Skip the remaining tasks, including ones in error, rolled back, or not started | Select Skip Flow from the Actions menu. |

**Create a User-Defined QuickPay Flow Pattern**

When you start a QuickPay process using the Calculate QuickPay task, the checklist displays the tasks included in the predefined QuickPay flow pattern. To base the checklist on a user-defined flow pattern, you update the FLOW_DEFINITION user-defined table. When required, you can always start a QuickPay process using the predefined or other QuickPay flow pattern. Use the Submit a Payroll Flow task in the Payroll Checklist work area.

This topic covers the following procedures:

- Replace the predefine QuickPay flow
- Revert to the predefined QuickPay flow
Replace the Predefined QuickPay Flow

As a prerequisite, you copy and update the predefined QuickPay flow pattern. You then complete the steps to update the FLOW_DEFINITION user-defined table.

Create a user-defined flow pattern.

1. Use the Manage Payroll Flow Pattern task in the Payroll Checklist work area.
2. Copy the predefined QuickPay flow pattern, and specify its legislative data group.
3. Update the new flow pattern with the tasks to include in your QuickPay flow.

Complete the following steps for the FLOW_NAME column.

1. Use the Manage User-Defined Tables task in the Payroll Calculation work area. Specify the legislative data group as a search criteria. Search for and open the FLOW_DEFINITION table.

   ✍️ Note: Each legislative data group can have only one flow pattern specified for the Calculate QuickPay task.

2. Click the Edit.
3. Specify the Effective As-Of Date.
4. In the User-Defined Columns section, select FLOW_NAME.
5. In the User-Defined Rows section, click Create.
6. In the Sequence field, enter the number 1.
7. In the Exact field, enter a name, such as Enter Flow Name.
8. Click Next.
9. On the Edit User-Defined Table page in the User Defined Table Values section, click Create.
10. In the Add User-Defined Table Values dialog, select the name you specified for the Exact field.
11. In the Value field, enter QUICK_PAY.
12. Save your work.
13. Click Back to return to the Edit User-Defined Table page.

Complete the following steps for the FLOW_NAME_OVERRIDE column.

1. On the Edit User-Defined table page, in the User-Defined Columns section, select FLOW_QUICKPAY_OVERRIDE.
2. Click Next.
3. On the Edit User-Defined Table page in the User Defined Table Values section, click Create.
4. In the Add User-Defined Table Values dialog, select the name you specified for the Exact field.
5. In the Value field, enter the name of the QuickPay flow pattern you configured.
6. Click Submit.

Revert to the Predefined QuickPay Flow

The Calculate QuickPay task uses the user-defined table values specified in the FLOW_DEFINITION table. As a result, if you no longer want to use the configured default QuickPay flow, edit the user-defined table values.

1. Use the Manage User-Defined Tables task and search for the FLOW_DEFINITION table for your legislative data group.
2. Edit the FLOW_NAME_OVERRIDE column. Delete the name of the configured QuickPay in the Value field in the User-Defined Table Values section.
3. Review the FLOW_NAME column. Keep QUICKPAY in the Value field in the User-Defined Table Values section.

Related Topics
- Create a User-Defined Table for Matched Row Values
Examples of Using Flow Interaction for QuickPay Flows

Let's look at some examples to understand how to specify flow interaction when you process a QuickPay after calculating QuickPay run results or prepayments.

Merge Flows after Calculating QuickPay

Scenario: While verifying payroll run results in your weekly payroll flow, you discover an error in the pay amount for an employee. You remove the person’s record from the payroll run, so that you can continue processing the payroll. You investigate the problem and update the person’s element entries on the Manage Person Details page. You select the Calculate QuickPay task from the Actions menu. You want to calculate the QuickPay and verify the results, and then process the combined QuickPay and payroll run for the Calculate Prepayments task.

On the Calculate QuickPay page, complete these steps to create the flow interaction.

1. Select Flow Interaction from the Action menu, and specify these details.

<table>
<thead>
<tr>
<th>From Flow</th>
<th>From Task</th>
<th>To Flow</th>
<th>To Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current QuickPay flow</td>
<td>View Payroll Results</td>
<td>Weekly Payroll Flow</td>
<td>Calculate Prepayments</td>
</tr>
</tbody>
</table>

2. Select the **Use to Calculate Results** option so that the weekly payroll flow includes the results of the QuickPay process.

The QuickPay flow ends and merges with the Calculate Prepayments task in the weekly payroll flow.

Merge Flows after Calculating Prepayments

Scenario: Verify the results of your prepayments task for your biweekly payroll flow when you receive notification to process the pay for a new hire. You want to generate an EFT payment for the new hire rather than issue an external payment. In your enterprise, you archive payroll results before generating payments. Use the Calculate QuickPay task to start the QuickPay process, and interact with the biweekly payroll flow, as shown in the following table. Select the **Use to Calculate Results** option so that the biweekly payroll flow includes the results of the QuickPay process.

<table>
<thead>
<tr>
<th>From Flow</th>
<th>From Task</th>
<th>To Flow</th>
<th>To Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current QuickPay flow</td>
<td>View Prepayment Results</td>
<td>Biweekly payroll flow</td>
<td>Archive Periodic Payroll Results</td>
</tr>
</tbody>
</table>

After marking the Verify QuickPay Results task in the QuickPay process complete, the QuickPay flow ends. The Archive Period Payroll Results task includes the results of the QuickPay process.
Submit a QuickPay Flow to Correct a Payroll Calculation Error

This example demonstrates how to submit a QuickPay flow for an employee to correct a calculation error that occurs in the main payroll run.

In this scenario, you complete the payroll calculation but not the prepayments calculation for the weekly payroll run. HR informs you that an employee took unpaid leave earlier in the month. You roll back the employee's payroll calculation to remove the person from the payroll run, and continue processing the weekly payroll and issue the payments. When you receive details about the leave from HR, you update the employee's records. You submit a QuickPay process to calculate the payroll run and prepayments for the employee, and to process an external payment.

Before you start, these are key decisions for this example.

<table>
<thead>
<tr>
<th>Decisions to Consider</th>
<th>In this Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is this a regular or supplemental run?</td>
<td>Regular</td>
</tr>
<tr>
<td>Should you exclude any elements from the payroll calculation?</td>
<td>No</td>
</tr>
<tr>
<td>Do you process the QuickPay results in the main payroll run?</td>
<td>No</td>
</tr>
</tbody>
</table>

Here's the list of tasks to submit a QuickPay flow for an employee to correct a calculation error in the main payroll run:

- Roll back the employee's payroll run results.
- Submit a QuickPay process.
- Calculate and verify payroll run results.
- Calculate and verify prepayments.
- Make an external payment and verify the payment results.

Roll Back and Correct Data

1. Before calculating payments for the main payroll run, roll back the employee's run results.
2. Complete the weekly payroll run.
3. Make the necessary corrections in the person's payroll or HR data.

Submit the QuickPay Flow

1. Select the **Calculate QuickPay** task in the Payroll Calculation work area.
2. On the Person page, search for and select the employee.
3. On the Calculate QuickPay page, optionally, override the payroll flow name with a more meaningful one. Verify the remaining information in the Details section.
   The Element Entries section refreshes to display all element entries that the QuickPay flow processes. Ensure that the process includes all element entries.
4. Click Submit Process.
5. Click Refresh until the Calculate QuickPay task is complete.
6. Click the Verify Payroll Results task in the checklist.
7. On the View Person Process Results page, click the person’s name in the Search Results.
8. In the Statement of Earnings section, verify the information in each of the Quick Reference Summary tabs.
9. Click Done to return to the QuickPay process.
10. Click Mark as Complete.

Calculate and Verify Prepayments

1. Click the Calculate QuickPay Prepayments task in the checklist.
2. In the Prepayments section, optionally, select an organization payment method and payment source.
3. Click Submit Process.
4. Click Refresh until the Calculate QuickPay Prepayments task completes.
5. Click the View Prepayments Results task in the checklist.
6. On the View Person Process Results page, click the person’s name in the Search Results.
7. Verify the prepayment results, including the payee, payment method, payment source, and payment amount.
8. Click Done to return to the QuickPay process.
9. Click Mark as Complete.

Make External Payment and Verify Payment Results

1. Click the Make External Payment task from the checklist.
2. In the External Payments section, select the payment and then select Make Payment from the Action menu.
3. Enter a check number and the reason you are generating the check externally. Click OK.
   The application marks the payment as Paid. This status prevents a payment process that would normally pick up this payment from processing it again.
4. Click Mark as Complete.
5. Click the Verify Payment task in the checklist.
6. On the View Person Process Results page, click the person’s name in the Search Results.
7. Verify the payment results. Click Done to return to the checklist.
   The payment results shown here should match the prepayment results you verified earlier.
8. Click Mark as Complete.

FAQ

Can I automate a QuickPay flow using a service?

No, because QuickPay tasks require user input. The Flow Actions service is only for flows that don’t require user action.
7 Reports and Extracts

Flow Patterns for Extracts and Reports

A flow pattern exists for each extract or report process. Flow patterns for extracts and reports typically contain a single flow task and they define the submission parameters. Use the Manage Payroll Flow Pattern task from the Payroll Checklist work area or the Refine Extract task in the Data Exchange work area to edit flow patterns. You can edit a flow pattern to add additional tasks. Each flow pattern you create must be associated with a security profile.

Payroll Calculation Reports

As a payroll manager, you can use a number of reports to identify any missing statutory data and to verify payroll calculations and payroll run results, and payroll costing results.

This table lists reports you can run from the Payroll Checklist or Payroll Calculation work areas.

<table>
<thead>
<tr>
<th>Report</th>
<th>Purpose</th>
<th>When to Run</th>
<th>Example of Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Balance Exception Report</td>
<td>Identify values that vary for the same balance dimension. This variance could indicate overpayments or underpayments.</td>
<td>Run after calculating the payroll run or QuickPay run, or before running statutory reports, such as quarterly or annual reports</td>
<td>View to identify potentially incorrect payments or amounts withheld.</td>
</tr>
<tr>
<td>Deduction Report</td>
<td>View details of payroll deductions processed for the specified period.</td>
<td>Run every pay period</td>
<td>Validate the deduction amounts processed.</td>
</tr>
<tr>
<td>Element Results Register</td>
<td>View a list of elements and their primary output values for processes that generate run results.</td>
<td>Usually run every pay period after running the Payroll Activity Report</td>
<td>Review run results for payroll processes. Create a pivot table to obtain totals. During implementation, reconcile run results with the results produced by your legacy payroll.</td>
</tr>
<tr>
<td>Gross-to-Net Report</td>
<td>View summary or detail listings for the total results calculated in the payroll run. Control which results to view by specifying a date range that includes the process dates of the payroll calculations. The report displays the balances for the payroll period in which the process date occurs.</td>
<td>Run after each payroll run or, at a minimum, on a quarterly basis</td>
<td>Review balances generated from payroll run, QuickPay, and payroll reversal calculations before calculating prepayments.</td>
</tr>
<tr>
<td>Report</td>
<td>Purpose</td>
<td>When to Run</td>
<td>Example of Usage</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-------------------------------------------------------------------------</td>
<td>--------------------------------------</td>
<td>----------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Payroll Activity Report</td>
<td>View details of the payroll run, QuickPay, such as balance adjustments, reversals, and balance initializations, taxes withheld, earnings, deductions, payment information, employer liability, and quarter and year-to-date details.</td>
<td>Run the report before processing prepayments</td>
<td>Verify, validate, and audit run results before processing payments.</td>
</tr>
<tr>
<td>Payroll Balance Report</td>
<td>View balance results of the payroll run. Extracts the run balance results for a specific period. Supplies detailed balance information for a specific employee over a defined period of time.</td>
<td>Run as needed for diagnostic purposes.</td>
<td>Verify the values of other reports. You can use this report to pinpoint a problem discovered by another report.</td>
</tr>
<tr>
<td>Payroll Costing Report</td>
<td>View details of the costing results from payroll calculations. View details after submitting corrective actions, such as cost adjustments and retroactive costing, or costing balance adjustments.</td>
<td>Run the report before transferring costing results to subledger accounting or to general ledger.</td>
<td>Verify results after you submit a process that generates costing results.</td>
</tr>
<tr>
<td>Payroll Data Validation Report</td>
<td>View a listing of noncompliant or missing statutory information for a person by payroll statutory unit.</td>
<td>Run before calculating payroll as needed.</td>
<td>Identify any missing attributes based on statutory rules of the legislative data group, such as tax reporting unit.</td>
</tr>
</tbody>
</table>

Filter reports by location when reconciling payroll calculation and costing results in reports that include the Location parameter. The report output lists the payroll relationship records based on a person’s assignment location. In the report output, the location is listed along with the other parameters, but not as a column in the results.

**Payment Distribution Reports**

Verify payment calculations and payment distributions using the reports from the Payment Distribution work area.

<table>
<thead>
<tr>
<th>Report</th>
<th>Purpose</th>
<th>When to Run</th>
<th>Example of Usage</th>
</tr>
</thead>
</table>
| Payroll Register | Verification, validation, and audit of payroll calculations | After calculating payroll and archiving periodic payroll results | Use the summary report to verify total payment amounts per balance category for a payroll period for a payroll statutory unit or a tax reporting unit.  
Use the detail report to review the complete payroll run details for each employee to balance and reconcile payroll and to compare the payment values to previous periods. |
### Report | Purpose | When to Run | Example of Usage
--- | --- | --- | ---
Payment Register | Verification and audit of payment distributions | After calculating prepayments, running the payment process, and generating payslips | Use the summary report to verify the total amounts paid by payment category, type, status, and method. Use the detail report to validate payments for each employee, including the payment amount, bank, and check information. Optionally, filter this report by location when reconciling payments. The report lists the payroll relationship records based on a person's assignment location. The location is listed with the other parameters, but not on the results.

Payslips | Provides a record of individual payroll payments received, including pay amounts, deductions taken, and accruals | After generating payments and archiving periodic payroll results | Generate payslips for all employees as a record of payments made. Payroll managers and administrators can view payslips from the Person Management work area. Employees can view or print their payslips from the Portrait page.

Third-Party Payment Register | Provides details of all payments made to a third-party person or organization, including involuntary and voluntary deductions. | After generating payments | Use the summary report to view a list of payments by payroll statutory unit. Use the detail report to view the breakdown and roll-up of payments.

After submitting a report that uses archived data, you can submit the Redeliver Output process from the Payroll Checklist work area to regenerate the report. If the report supports additional delivery types, you can optionally change delivery options.

**Related Topics**

- Overview of Distributing Payroll Payments
- When should I archive payroll data
- Payment Statuses
- Verifying and Troubleshooting Payments
- Reporting Payment and Nonpayment Balances
FAQ

What's the difference between submitting a flow and a process or report?

The Submit a Payroll Flow task starts a flow that consists of more than one task. The flow can include manual tasks such as verification tasks, and automatic tasks such as reports and processes. Examples of predefined flows include QuickPay and the payroll cycle flow.

The Submit a Process or Report task starts a flow that consists of a single automatic task, such as a report or extract process.
8 Delivered Flows

Single Process or Reports

Generate Check Payments

Use the Generate Check Payments task to generate checks for all your employees and third parties who have a check payment method and a net payment greater than zero.

Use the delivered flow either as an:

- Individual flow to generate check payments after the payroll calculations and payment distribution tasks are complete, or
- Within a flow pattern to run automatically after the calculate payroll and payment distribution tasks are complete. For example, the Generate Check Payments task is included in the Expedited Payroll Processing flow pattern. The flow runs automatically after the Archive Periodic Payroll Results task archives the expedited payroll results for further processing.

Use the Manage Payroll Flow Patterns task to search for and view the details of the Generate Check Payments flow.

Use the Submit a Payroll Flow task to submit the Generate Check Payments flow.

You can also use the Refine Extracts task to access this flow.

The Generate Check Payments task is generally run after the Calculate Payroll, Calculate Prepayments, and Archive Periodic Payroll Results tasks are complete. After the payroll calculations are complete, run the Calculate Prepayments process to distribute the net payments based on the employee’s personal payment method. The Archive Periodic Payroll Results task archives the payroll results for further processing. The Generate Check Payments task generates checks for the archived payroll results that have a payment type of Check.

Flow Tasks and Task Sequence

You can copy and edit the flow to include additional tasks. For example, you can include a Verify Payments task to verify the generated check payments, or a Void Payments task to void payments made wrongly.

Use the Task Sequence tab to view the sequence of the tasks within the flow. You can review the task sequence and reorder, add or delete tasks, as required.

Flow Parameters

Flow parameters supply the information you require to run the flow and successfully complete the tasks within the flow pattern.

Before you submit the Generate Check Payments flow, review and edit the flow parameters to ensure that the correct values are used to generate the checks as per the requirements.

Here’s the details of parameters you can define for the Generate Check Payments flow.
<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
<th>Parameter Basis</th>
<th>Basis Value</th>
<th>Usage</th>
<th>Display Format</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consolidation Group</td>
<td>Defines a grouping of different payrolls for reporting purposes. If you don't select a value, the application uses the default consolidation group assigned to the payroll.</td>
<td>Bind to Flow</td>
<td>Consolidation Group</td>
<td>Input Parameter</td>
<td>Smart lists of values</td>
</tr>
<tr>
<td>End Check Number</td>
<td>The last check number for processing.</td>
<td>Bind to Flow</td>
<td>End Check Number</td>
<td>Input Parameter</td>
<td>Number</td>
</tr>
<tr>
<td>Organization Payment Method</td>
<td>Determines the payment source for this flow. Select a value that has a payment type of Check.</td>
<td>Bind to Flow</td>
<td>Organization Payment Method</td>
<td>Input Parameter</td>
<td>Smart lists of values</td>
</tr>
<tr>
<td>Overriding Payment Date</td>
<td>Determines the payment due date for the checks.</td>
<td>Bind to Flow</td>
<td>Overriding Payment Date</td>
<td>Input Parameter</td>
<td>Date</td>
</tr>
<tr>
<td>Payment Source</td>
<td>Determines the payer bank account information so that the correct check template is used to generate the check payments.</td>
<td>Bind to Flow</td>
<td>Payment Source</td>
<td>Input Parameter</td>
<td>Smart list of values</td>
</tr>
<tr>
<td>Payment Type</td>
<td>Mode of payment associated with the Organization Payment Method and Payment Source values you select.</td>
<td>Post SQL Bind</td>
<td></td>
<td>Input Parameter</td>
<td>An SQL statement is used to derive the value. The value isn't displayed on the page.</td>
</tr>
<tr>
<td>Payroll</td>
<td>Name of the payroll run for which the checks are generated.</td>
<td>Bind to Flow</td>
<td>Payroll</td>
<td>Input Parameter</td>
<td>Smart list of values</td>
</tr>
<tr>
<td>Payroll Process</td>
<td>Action ID that's generated when you submit the Generate Check Payments flow.</td>
<td>Context Binding</td>
<td>Action ID. Derives the value of the parameter from the context of the current flow instance.</td>
<td>Output Parameter</td>
<td></td>
</tr>
<tr>
<td>Process Configuration Group</td>
<td>Defines the rules for payroll processes,</td>
<td>Bind to Flow</td>
<td>Process Configuration Group</td>
<td>Input Parameter</td>
<td>Smart list of values</td>
</tr>
</tbody>
</table>
### Additional Flow Details

Before you submit the Generate Check Payments flow, define the following.

**Task Owner**

Assign an owner for the task on the Edit Task Details: Owner and Checklist page. The owner can initiate the task, monitor the status, roll back or retry the task, and also review errors and messages the task generates.

**Duration**

Enter a Due Date and offset value in the Duration region of the Edit Task Details: Duration and Notifications page.

**Notifications**

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<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
<th>Parameter Basis</th>
<th>Basis Value</th>
<th>Usage</th>
<th>Display Format</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process Start Date</td>
<td>All Payroll or QuickPay runs with an effective date greater than this date are considered for this flow instance.</td>
<td>Bind to Flow</td>
<td>Process Start Date</td>
<td>Input Parameter</td>
<td>Date</td>
</tr>
<tr>
<td>Process End Date</td>
<td>Last effective date of the payroll processes. All Payroll or QuickPay runs with an effective date prior to this date are considered.</td>
<td>Bind to Flow</td>
<td>Process End Date</td>
<td>Input Parameter</td>
<td>Date</td>
</tr>
<tr>
<td>Request</td>
<td>Request ID of the current flow instance.</td>
<td>Context Binding</td>
<td>Derives the value of the parameter from the context of the current flow instance.</td>
<td>Input Parameter</td>
<td></td>
</tr>
<tr>
<td>Sort Procedure</td>
<td>Constant Bind</td>
<td>Constant Bind</td>
<td>Default</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start Check Number</td>
<td>Bind to Flow</td>
<td>Start Check Number</td>
<td>Input Parameter</td>
<td>Number</td>
<td></td>
</tr>
</tbody>
</table>
Select a Flow Task Start Notification option in the notification region of the Edit Task Details: Duration and Notifications page. You can select a notification to send error and warning messages, and to inform the task owner when a task starts or ends. The receipt of notifications depends on the duration dates and their offsets.

**Calculate Retroactive Pay for a Single Employee**

Use the Run Quick Retroactive Pay for Single Worker task to calculate retroactive pay for a single employee for prior period adjustments. For example, an employee receives a salary hike that’s backdated to a previous pay period. You can add this task to an existing flow or a new flow and run the retroactive pay.

Before you run the retroactive pay, complete these tasks.

- Verify that the retroactive element entries are added to the employee for the period for which the retroactive pay is processed.
- Enable proration and retroactive changes for the element you want to reprocess for the employee.
- Set up a retroactive event group for retroactive proration and retroactive calculation and associate the employee with the group.

Here are the steps required to Run Quick Retroactive Pay for the employee.

1. Navigate to the **Payroll Checklist** work area.
2. Select the **Manage Payroll Flow Patterns** task.
3. Click **Create** in the Search Results section.
4. On the Basic Information page, leave the Legislative Data Group (LDG) field blank, if this flow should be visible to all LDGs.
5. Click **Continue**.
6. On the Create Payroll Flow Pattern: Basic Information page, enter these values.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flow Pattern</td>
<td>Recalculate Payroll for Retroactive Changes for Single Employee</td>
</tr>
<tr>
<td>LDG Required</td>
<td>Yes</td>
</tr>
<tr>
<td>Description</td>
<td>Run Quick Retroactive Pay for Single Worker</td>
</tr>
<tr>
<td>Flow Status</td>
<td>Active</td>
</tr>
<tr>
<td>Activities to Include</td>
<td>Calculate</td>
</tr>
<tr>
<td>Selected Tasks</td>
<td>Recalculate Payroll for Retroactive Changes for Single Employee</td>
</tr>
</tbody>
</table>

7. Click **Next** twice.
8. On Create Payroll Flow Pattern: Parameters page, click **Select and Add**, and add the task parameters. You must select values for the mandatory Payroll, Payroll Relationship, and Process Date fields.
9. Click **Next** twice.
10. Click **Submit**.
Composite Flows

Expedited Payroll Flow

Use the Expedited payroll flow to process expedited payments for prior pay period adjustments on the time card. The Expedited payroll flow is similar to the regular payroll flow. The flow includes a sequence of payroll tasks and reports to identify, calculate, and make expedited payments.

Use the Submit a Payroll Flow task from the Payroll Checklist or Payroll Calculation work area to submit an expedited payroll flow.

Run the expedited flow on demand or schedule the flow to run at a predefined date for expedited processing. When you submit a Payroll Flow, select Yes in the Expedite Payroll field, to identify this run as an expedited run.

Time cards that come in late or have errors are identified and marked for expedited processing by the manager in the Time and Labor application. The manager sets the Expedite value to Yes on the time card, so that the payroll entries are included in the expedited process. If the Expedite value is Yes, the manager can Override the Payment Method to Check and also set the Override Check Printer value to a specified printer location.

The Expedited payroll flow processes all time cards that are marked for expedited processing. The next regular payroll cycle processes the unapproved time cards.

Here’s the list of tasks in sequence that the expedited payroll flow triggers:

1. The Recalculate Payroll for Retroactive Changes task generates retroactive element entries for the prior pay period adjustments pertaining to time cards marked for expedited processing. The retroactive element entries retain the expedited payroll attributes from the time card elements.
2. The Calculate Payroll task includes employees whose time cards are marked for expedited processing and includes elements configured for expedited processing. Employees without any expedited processing entries are skipped.
3. The Calculate Prepayments task checks for employees whose payment method is overridden to Check, on the value definition of the payroll entry. If no override is found, it uses the usual payment method it would use in a regular payroll run.
4. The Archive Periodic Payroll Results task archives the expedited payroll results for further processing. The Check Writer accesses these values through the XML.
5. The Generate Check Payments task picks all the prepayments marked for Check.
6. The Make EFT Payments task picks all the prepayments that aren’t overridden to check and who have a default payment method of EFT payments.
7. The Generate Payslips task generates payslips for all the employees receiving expedited payments in this flow. The employees who are eligible for an expedited payment can use the Override Payslip Availability Date to view their payslip. Set the Override Payslip Availability Date to a date earlier than the regular payslip availability date that’s defined in the regular payroll calendar.

Related Topics

- Expedited Processing Rules
- How Expedited Processing Works
Glossary

**external payment**
A payment processed by a prepayment process, but generated externally. Examples include a hand-written check for a terminated employee and a payment made with a different payment type or payment source than specified in the prepayment process.

**flow**
An occurrence of a flow pattern that you manage from a payroll work area or from the Data Exchange work area using the View Extracts task. The data security for your role determines which flows you can submit and access.

**flow checklist**
A sequence of automatic and manual flow tasks grouped into activities, such as extract reports and processes, or tasks related to payroll processing. Submitting a flow generates a checklist that you use to monitor the flow and manage its tasks.

**flow pattern**
A series of tasks performed in a predefined order, which are grouped into activities, such as extract reports and processes, or tasks that cover a phase of the payroll process. The flow pattern is used to generate a flow, which you can manage from its checklist.

**HCM data role**
A job role, such as benefits administrator, associated with instances of HCM data, such as all employees in a department.