

Product Family

How do I configure QuickPay flows?

FA Latest



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1 Setup Summary

Scope

Use this playbook to understand how you can set up and use QuickPay flows.

This playbook details how you can use QuickPay to submit a flow that calculates the run results for a person without having to wait for the standard payroll run. For example, you may want to generate payments for a new hire who wasn't included in the regular payroll run, or a terminated employee whom you have to pay settlements before the next regular payroll run.

Scenario

You're a payroll administrator for Vision Corporation. After you run the regular payroll for your employees, the HR informs you that one of your employees, James Patrick, took unpaid leave earlier in the month.

You have only completed the payroll run and have not yet generated payments for your employees. You roll back the employee's payroll calculation to remove James from the payroll run, and continue processing the weekly payroll and issue the payments for all other employees.

After you receive the leave record details from HR, you update James Patrick's records. You submit a QuickPay process to calculate the payroll run and prepayments for James, and to process an external payment.

Setup Approach

Here are the key steps or tasks required to accomplish the scenario explained previously.

You need to submit a QuickPay flow for an employee to correct a calculation error in the main payroll run.

1. Roll back the employee's payroll run results.
2. Correct the employees records to account for the unpaid leave.
3. Submit a QuickPay process for the employee.
4. Calculate and verify payroll run results of the employee.
5. Calculate and verify prepayments of the employee.
6. Make an external payment and verify the payment results.

Use a QuickPay flow that has these tasks:

1. Calculate QuickPay
2. Verify Payroll Results
3. Calculate QuickPay Prepayments
4. View Prepayments Results
5. Make External Payments

6. Verify Payments

2 Understanding QuickPay and QuickPay Flows

Overview

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, you can use this task to process new-hire or termination payments or make special payments that aren't included in the regular payroll run.

To use the single Calculate QuickPay task, you must enable the `ORA_UNIFIED_QUICKPAY_ENABLED` profile option. For more details, refer 'Enable the Single Calculate QuickPay Flow' topic in this playbook.

The Calculate QuickPay task takes you to the Person Search page. Use the single-search option on the Person Search page and search for the person for whom you want to process the QuickPay.

The Effective As-of Date defaults to the current date. If you want to process the QuickPay for a specific payroll period, enter a specific **Effective As-of Date** on the Person Search page.

Based on the person you select and the effective date used for the search, the QuickPay Submission page opens with the person's payroll, the date earned, process name, and process date defaulted automatically.

To use an alternate, delivered QuickPay flow, use the **Actions** menu on the QuickPay Submission page and select any of the flows listed in this table.

QuickPay Flows

Task Name	What it Does	When to Use
Simplified QuickPay	<p>Runs the QuickPay process and displays the Statement of Earnings. It includes tasks for calculating payroll run results.</p> <p>The Calculate QuickPay task defaults to this flow.</p>	Process all QuickPay actions from a single page.
QuickPay Payments	<p>Processes QuickPay and prepayments before displaying the Statement of Earnings. Tasks include:</p> <ul style="list-style-type: none">• Calculate QuickPay• Calculate QuickPay Prepayments• View Statement of Earning	Process all QuickPay actions and prepayments from a single page using a single flow.
User-defined QuickPay flow	Replace the default seeded QuickPay flow with a user-defined QuickPay flow pattern. Include tasks as per your requirement.	Schedule the QuickPay flow as per your requirement.

Task Name	What it Does	When to Use
	Note: For the flow to list within the Actions menu, you must tag the flow as a QuickPay or QuickPay with Parameter flow on the flow setup page.	

Before you submit the QuickPay flow, you can review the person's element entries on the QuickPay Submission page and include or exclude the element entries as required. You can use the filter options to narrow your search to a specific element. Time and absence entries are in read-only mode and you can't update the details.

After you submit the QuickPay successfully, you can view the progress of the flow on the Checklists page. After completion of the flow, you can view the employee's Statement of Earnings.

Examples of Using QuickPay

Let's look at some examples of how you can use the QuickPay flow for an adhoc payroll requirement.

Pay Separate Check for Employee Bonus

You want to pay an employee special incentive bonus separately from the regular pay. The employee doesn't want any voluntary deductions, such as charitable donations or retirement fund contributions, taken from the bonus pay. Use the Element Entries task and add the bonus to the employee's element entries. Select Calculate QuickPay from the Actions menu, and specify these settings:

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

Pay a Terminated Employee

HR terminates an employee in the middle of a payroll period. HR requests that you process and pay the person immediately. Update the employee's payroll information. Use the QuickPay Payments task to submit a QuickPay calculation, and make an external payment for the employee's final pay.

Pay a New Hire After the 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, use the QuickPay Payments task, submit a QuickPay calculation, and make an external payment. Normal processing of the employee's pay resumes with the next payroll cycle.

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. Submit a QuickPay process for a few employees and review the results, then roll back the QuickPay calculation.

1. Submit the QuickPay process for the employees eligible for the bonus payment.
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. After verifying the results, use the Roll Back action from the Checklists page and roll back the QuickPay run.
4. Submit the regular payroll to recalculate run results for all employees, including those eligible for the bonus, and generate payments.

Use this scenario 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.

Enable the Single Calculate QuickPay Flow

Enable the **ORA_UNIFIED_QUICKPAY_ENABLED** profile option to use the single Calculate QuickPay task.

If you do not enable this profile option you can use only the QuickPay Simplified and QuickPay Payments tasks and you can't access the single Calculate QuickPay task.

1. Navigate to the Setup and Maintenance area and search for the **Manage Administrator Profile Options** task.
2. On the Manage Administrator Profile Values page, search for and select the **ORA_UNIFIED_QUICKPAY_ENABLED** profile option.
3. In the Profile Values section, click **Add**.
4. Specify the level at which you want to set the profile value. You can select either Site or User.
 - o If you select **User** as the profile level, select the **User Name** and select **Yes** in the associated **Profile Value** field.
 - o If you select **Site** as the profile level, select **Yes** in the **Profile Value** field if you want to enable the profile option for the entire site of deployment.
5. Click **Save and Close**.

Sign out and sign in again for the changes to take effect.

QuickPay Flows

Other than using the standalone Calculate QuickPay task, you can create a QuickPay flow to include the delivered QuickPay task and other additional tasks as per your requirement.

For example, create a QuickPay flow to process QuickPay and prepayments, and then generate the payslip to make payments for a new hire who wasn't included in the regular payroll run. The QuickPay flow has these tasks:

1. Calculate QuickPay
2. Verify Payroll Results
3. Calculate QuickPay Prepayments
4. View Prepayments Results
5. Make External Payments
6. Verify Payments

Use the **Payroll Flow Patterns** quick action under Payroll from My Client Groups on your Home page, to create a flow and add the requisite tasks to the flow as per your requirement.

Consider the following while creating a QuickPay flow.

Flow Pattern Type

When you create a QuickPay flow, use the **Flow Pattern Type** field on the flow setup page to set the flow as either:

- QuickPay
- QuickPay with Parameters

Note: These options are available only for user-defined flows you set up at the enterprise level. You don't select an LDG for the flow at the time of creation of the flow.

Select the QuickPay with Parameters option to include tasks that have additional parameters other than those available on the delivered QuickPay Submission page.

The parameters available to you is dependent on the tasks you include in the QuickPay flow. For example, you must include the payment-related tasks of prepayments, check payments, or EFT payments for the QuickPay Submission page to display payment-related parameters of payment methods, payment source, and so on.

Actions Menu

When you select QuickPay or QuickPay with Parameters option as the Flow Pattern Type for a flow, you can set the flow as the default flow.

The Calculate QuickPay task defaults to the QuickPay Simplified flow. Use the **Actions** menu on the QuickPay Submission page to select and submit an alternate QuickPay flow to the one defaulted by the Calculate QuickPay task. Select a flow that you want to submit without navigating away from the QuickPay Submission page.

Note: For a flow to list within the Actions menu, you must tag the flow as a QuickPay or QuickPay with Parameter flow on the flow setup page.

Parameter Input Page

If any of the added tasks in your QuickPay flow have additional parameters other than that included on the QuickPay Submission page, select the **QuickPay with Parameters** option on the flow setup page.

When you set this user-defined flow as your default flow and submit the flow, the application automatically displays the Parameter Input page first for you to define the additional task parameters. The QuickPay Submission page displays subsequently.

Note: If you don't select the **QuickPay with Parameters** option on the flow setup page, the Parameter Input page doesn't display when you submit the flow.

Key Parameters

When you set up a user-defined flow as a QuickPay flow, set these two parameters as the key parameters for the flow:

- Effective Date
- Payroll Relationship

If you don't set these two parameters as the key parameters, the flow setup fails and generates an error.

Flow Status

Set the flow as **Active**. Flows that are inactive, hidden, or created at an LDG-level aren't listed on the QuickPay submission page for you to select. You can only select and submit enterprise-level flows.

Process Configuration Group

Use the **Process Configuration Group** parameter to select a process configuration group of your choice when submitting a QuickPay.

- If you don't make a selection, the process configuration group value defaults to what you have set using the ACTION_PARAMETER_GROUPS profile option.
- However, if you haven't set the profile option and the field is left blank, then it defaults to the default group for the QuickPay process.

Enable Payroll Background Process

The payroll background process runs continuously to handle periodic requests for processing. To enable the payroll background process for QuickPay, edit the **Pay Daemon Group** action parameter group and set the 'Enable QuickPay Daemon' to **Y**.

Enable Logging

To facilitate process diagnostics of the QuickPay process, submit the QuickPay with the **Upload logs for Payroll Background Process to the UCM server** action parameter set to **Y**. When you enable logging and submit the QuickPay flow, the application creates files to capture additional payroll processing information. These files are stored on the server.

Subsequently, you can review these files and analyze the data for diagnostic purposes.

Note: For an existing user-defined flow that includes the QuickPay task, after you have configured the process configuration group, remove the task and add the task back into flow. This ensures that the QuickPay flow submission page displays the **Process Configuration Group** parameter correctly with the parameters enabled or disabled as configured by you.

Configure Default QuickPay Flow

The Calculate QuickPay task defaults to the QuickPay Simplified flow. Use the **ORA_PAY_DEFAULT_QUICKPAY_FLOW** profile option to set an alternate QuickPay flow as the default. Select either a predefined QuickPay flow or your own QuickPay flow as the default flow.

Use the Manage Administrator Profile Options task in the Setup and Maintenance area to enable the profile option. Enter the ORA_PAY_DEFAULT_QUICKPAY_FLOW profile option and choose the QuickPay flow you want to set as the default flow.

Sign out and sign in again for the changes to take effect. Now when you use the Calculate QuickPay task, you're defaulted to the QuickPay flow you've enabled as the default flow.

Disable QuickPay Flow Notifications

Use the **ORA_PAY_QP_ALLOW_WORKFLOW_NOTIFICATION** profile option to disable automatic flow notifications for the seeded QuickPay flows.

By default the profile option is set to **Yes** and automatic flow notifications are enabled for the seeded QuickPay flows.

Note: You can manage flow notifications only for the seeded QuickPay flows. You can't use this option on user-defined QuickPay flows.

Complete these steps to disable the notifications.

1. Navigate to the Setup and Maintenance area and search for the Manage Administrator Profile Options task.
2. On the Manage Administrator Profile Values page, search for and select the **ORA_PAY_QP_ALLOW_WORKFLOW_NOTIFICATION** profile option.
3. In the Profile Values section, click **Add**.
4. Select **Site** as the profile level to enable the profile option for the entire site of deployment.
5. Use the drop-down list in the Profile Value field and select **No** to disable the QuickPay notifications.
6. Click **Save and Close**.

Sign out and sign in again for the changes to take effect. Now when you use the Calculate QuickPay task, you don't see nor receive any notifications for the QuickPay flow.

Consolidate Results of Multiple QuickPay Runs

Use the consolidation group parameter to consolidate or group multiple payroll runs and process the results in a single action.

For example, use the consolidation group parameter to combine the results of the following multiple payroll runs into a single post processing task to generate payslips, payments, and reports.

- Combine the results of payroll and QuickPay runs
- Combine the results of multiple QuickPay runs

Note: The payroll and QuickPay runs must be run for the same payroll.

By default the delivered QuickPay, QuickPay Prepayments, and the Simplified QuickPay flow uses the default consolidation group that's assigned to the payroll. To change this value, use the Consolidation Group parameter while defining parameters for the QuickPay flow.

3 Create QuickPay Flows

Create a QuickPay Flow Pattern

Use the Payroll Flow Patterns quick action under Payroll from My Client Groups on your Home page, to create a QuickPay flow to process the QuickPay for a person and generate the payslip and check payments..

Use these tasks to create the QuickPay flow.

1. Calculate QuickPay
2. Calculate QuickPay Prepayments
3. Verify Payments
4. Archive Periodic Payroll Results
5. Generate Payslips
6. View Payslips
7. Generate Check Payments

Follow these steps to create a QuickPay flow pattern.

1. Use the **Payroll Flow Patterns** quick action under Payroll from My Client Groups on your Home page.
2. Click **Add** and select **Continue**.
3. Enter these details on the Create Payroll Flow Pattern: Basic Information page.

Fields for creating a QuickPay flow pattern

Field	Value
Flow Pattern	Enter a meaningful flow pattern name.
LDG Required	No
Flow Status	Active
Connector Status	Task Flow
Flow Pattern Type	QuickPay with Parameters

Select QuickPay with Parameters as the Flow Pattern Type because the Generate Check Payments task requires the additional payment sources information which is not part of the QuickPay Submission page.

4. Under **Activities to Include**, select **Payments and Payroll Calculation** and click **Next**.
5. Select the tasks sequentially, based on the order in which they should be run. Select each task and define the owner and notifications.

Note: Select the 'Process After Error' check box for the Generate Check Payments task so that the QuickPay flow is not stalled and it completes to generate the payments and the payslip.

6. Click **Next**. Review the tasks sequence and make changes if required.
7. Click **Next**. Select parameters that apply when submitting the flow. Set these two parameters as the key parameters for the flow:

- Effective Date
 - Payroll Relationship
8. Click **Next**. Specify the task parameter details. The application references the parameter basis when determining the parameter's default value.
 9. Click **Next**. Review the flow and use the **Back** button if you want to make changes to any of the previous sections.
 10. Click **Submit** and submit the flow.

After you submit the QuickPay successfully, you can see the employee's Statement of Earnings.

Create a QuickPay Flow to Correct a Payroll Calculation Error

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

In this scenario, you have completed 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.

Complete the following to correct the employee's leave record and make payments using the corrected records.

1. Roll back the employee's payroll calculation to remove the person from the payroll run.
2. Continue processing the weekly payroll and issue the payments for the rest of the employees.
3. Subsequently, when you receive details about the leave from HR, you update the employee's records.
4. You then submit a QuickPay process to calculate the payroll run and prepayments for the employee, and to process an external payment.

Use a QuickPay flow that has these tasks:

1. Calculate QuickPay
2. Verify Payroll Results
3. Calculate QuickPay Prepayments
4. View Prepayments Results
5. Make External Payments
6. Verify Payments

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 employee's payroll or HR data.

Submit the QuickPay Flow

1. Select the **Calculate QuickPay** task on the Payroll page.
2. On the Person page, search for and select the employee.
3. On the QuickPay Submission page, optionally, override the payroll flow name with a more meaningful one. Verify the remaining information.

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**.
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**.
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**.

Troubleshooting QuickPay Flows

Here's a list of likely issues and their possible solutions related to QuickPay flows.

Troubleshoot QuickPay

Problem	Solution
Error when you select a flow using the Actions menu on the QuickPay Submission page.	Verify the following: <ul style="list-style-type: none">• If you have set up the user-defined QuickPay flow as the default.• If you have access to the QuickPay flow you are selecting.• If the QuickPay flow you are selecting is inactive.
Can't find the user-defined flow in the Actions list on the QuickPay Submission page.	Verify the following: <ul style="list-style-type: none">• If you have selected either QuickPay or QuickPay with Parameters option in the Flow Pattern Type field on the flow setup page.• The flow isn't inactive or hidden.• The flow is an LDG-level flow. <p>Only flows created at the enterprise-level can be set up as a QuickPay flow.</p>
You can't switch to another flow.	<ul style="list-style-type: none">• An automatic task within a flow is in progress; wait for the flow to complete.• Check if the flow is in completed status.
Parameter Input page doesn't display.	<ul style="list-style-type: none">• Select the QuickPay with Parameters Flow Pattern Type on the flow setup page.• Set the QuickPay flow as the default flow.