

Oracle Fusion Cloud Human Resources

Upgrade a payroll element

FA Latest



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G55765-01

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Author: Niresh Mathur

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1 Overview

Overview of the element upgrade process

This playbook explains how you can upgrade existing elements to incorporate changes and enhancements.

When Oracle delivers updates as part of bug fixes or functional improvements, they might include modifications to input values, formulas, or balances. These updates apply only to new elements created after the patch is implemented and don't automatically apply to existing elements. If you want those updates reflected in your current elements, perform the following steps.

2 Key conditions

Key conditions for element upgrades

The following conditions apply to the upgrade of existing elements.

1. Run in draft mode first: Start by running the program in draft mode with the required primary classification. Review the results to ensure elements have the correct parameters. Once validated, proceed to final mode.
2. Run in final mode: In the final mode, select the element name along with its primary classification. If many elements share the same classification, you can run the program using classification and subclassification combinations.
3. Review reports: The process generates reports for both modes. In draft mode, review the **Oracle Delivered Modified Formula** column to verify changes to predefined formulas.
After validation, rerun in final mode with the appropriate **Formula Upgrade Option** value.
4. Compile updated formulas: After upgrading, run the **Bulk Compile Formulas** process for the **Oracle Payroll** formula type.
5. Set effective date for pretax iteration (Localization): Before upgrading pretax elements for iteration, set the **Date used by the element upgrade process for iteration flag** process configuration parameter.
 - o This should be the day after the latest payroll run to avoid retroactive impacts. For example, if payroll ended on 15-NOV-2018, set the date to 16-NOV-2018.
6. Enable iteration for pretax elements (Localization): In the **Enable Feature** field, select **Iteration on Pretax Element**.
 - o This option is available only for the **Pretax Deductions** primary classification.
 - o Formula override is required; only **Override the existing formula** option is supported.
 - o If proration is enabled for the pretax element, it can't be upgraded for iteration using this process.

Key conditions for object upgrades

The following conditions apply to the upgrade of objects.

General rules:

- Most object updates are performed in correction mode.
- The iteration indicator (in the element object navigator) is updated in update mode, using the effective date defined in the process configuration parameter.
- All formula changes during the upgrade are applied in correction mode.

| Object | Conditions |
|---------------|---|
| Balance Feeds | Input values must be created before balance feeds are defined. |
| Balance Types | No specific conditions, unless the dependent object already exists. |

| Object | Conditions |
|----------------------------------|--|
| Calculation Card Components | These are upgraded to link component detail flexfields with calculation components: <ul style="list-style-type: none"> • CIR Comp Flex • CIR Comp Flex Usages • CIR Comp Flex Relationships |
| Calculation Card Override Usages | No specific conditions. |
| Calculation Unit | No specific conditions. |
| Defined Balances | No specific conditions. |
| Element Eligibility Input Values | Input values must be created before adding eligibility input values. |
| Element Entries | Entries are created for all date-effective records for new input values. |
| Fast Formulas | Depends on the selected Formula Upgrade Option value. |
| Formula Results | No specific conditions, unless the dependent object already exists. |
| Input Values | The following validations apply: <ul style="list-style-type: none"> • The element must not be retro-enabled. • Input value must not be marked as required. • Input value must not have default values. • Default at runtime must not be enabled. • Duplicate input values (same name) must not be created. • If enabled for Database Items (DBI), ensure the DBI is created. • Special purpose value must not duplicate existing values within the same element. <p>Note: The above validations (retro, required, default values, and default at runtime) don't apply to Pretax elements, as they're required for enabling iteration functionality. These validations remain applicable for all other classifications.</p> |
| Status Processing Rules | No specific conditions, unless the dependent object already exists. |

3 Run the upgrade process

Run the element upgrade process

Use the **Run Element Upgrade** process to upgrade existing element components such as defined balances and formulas.

1. Go to **My Client Groups > Payroll > Submit a Flow**.
2. Select the **Legislative Data Group** for which you want to run the process.
3. Search for and select **Run Element Upgrade**.
4. In the **Payroll Flow** field, enter a name for the flow.
5. In the **Required Parameters** section, specify the following:
 - a. In the **Mode** list, select an option:
 - **Draft**: Review proposed changes without applying them.
 - **Final**: Apply the changes.
 - b. In the **Primary Classification** list, select the element classification (for example, Standard Earnings, Supplemental Earnings).
 - c. In the **Formula Upgrade Option** list, select an appropriate value.

Available values depend on the selected mode:

- In **Draft Mode**, select **Display all formulas** to review impacted formulas.
 - In **Final Mode**:
 - o Select **Override the existing formula** to replace the existing formula and retain the old version as backup.
 - o Select **Do not make changes to the existing formula** to retain the current formula without changes.
6. In the **Optional Parameters** section, specify the following:
 - a. In the **Secondary Classification** list, select a secondary classification to refine the selection.
 - b. In the **Enable Feature** list, select **Iteration on Pretax Element** to enable iteration for pretax elements.

Note: This option is available only when you select the primary classification as **Pretax Deductions**. The **Formula Upgrade Option** value is restricted to **Override the existing formula**. Overriding the formula is required to enable iteration functionality for pretax elements.
 - c. Select a specific element and configuration group, if applicable.
 7. Submit the flow.

4 Review the output

Review the process output

The element upgrade process generates an output report in Microsoft Excel format with two sheets:

- **Parameters** sheet: Displays the parameter details used for the run.
- **Upgrade Details** sheet: Displays details of the upgraded objects.

The **Upgrade Details** sheet includes the following columns:

| Column Title | Description |
|-----------------------------------|---|
| Element Name | Name of the element. |
| Upgrade Object | Type of object being upgraded, such as Balance Type, Input Value, Fast Formula, or Formula Results. |
| Object Name | Name of the specific object. |
| Object Details | Other details about the object. For example, if the upgrade object is Balance Feed : <ul style="list-style-type: none"> • Object Name shows the input value. • Object Details shows the associated balance type. |
| New or Existing | Indicates whether the object is new or existing: <ul style="list-style-type: none"> • Existing: An existing object is being modified. For example, a fast formula is updated. • New: A new object is created. For example, a new input value is added. |
| Backup Formula Name | Displays the name of the backup formula created during Final Mode when a fast formula is upgraded. This field is blank for a formula object, if the process is run in Draft Mode or the formula isn't upgraded. |
| Status | Indicates whether the upgrade was successful or failed. |
| Message | Displays any messages related to the upgraded object. |
| Oracle Delivered Modified Formula | Indicates whether the delivered formula has been modified by the user. <ul style="list-style-type: none"> • Displayed only in Draft Mode. • Lets you determine whether to upgrade to the latest delivered formula. • If upgraded in Final Mode using Override the existing formula, the existing formula is replaced. |

| Column Title | Description |
|--------------|--|
| | <ul style="list-style-type: none">The previous version remains available for reference using the Backup Formula Name. |