

HRMS Forms Configurator

Presented
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Introduction

- What is Forms Configurator?
- Where is Forms Configurator?
- How do you use Forms Configurator?



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Forms configurator is by far the most comprehensive of the HRMS customisation facilities.

With forms configurator you can create templates, a template will enable you to customise particular forms by:

- Customising the position of fields
- Adding or removing fields from a form
- Control field properties such as the ability to insert or update
- Customise tab pages and windows

Forms configurator can be accessed from a HRMS responsibility and the default navigation is usually Security > Forms Configurator or Security > People Management Configurator

Benefits

- Customisable HRMS Screens
- Reduce the screens users need to learn
- Increase data input
- More efficient data retrieval



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Components

- Templates
- Windows
 - Find
 - Summary
 - Maintain
- Tabs
- Items



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Templates

- Basis of the customisation
- Encompasses all other components
- Some pre-defined Templates



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Find Window

- Used to limit results returned
- 2 Canvases
 - Find Tabs – For entering your criteria
 - Find Folder – For displaying your results
- Both components customisable



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The Find window is used to limit the number of people that are shown in the maintain and summary windows.

The find window is made up of 2 components, the find folder which is where the results of the find will be shown, and the find tabs which are used to enter the search criteria.

Each of these components can be configured and the items on these components are also configurable.

HRMS Forms Configurator

The screenshot shows the HRMS Forms Configurator interface. At the top, there are two tabs: 'Basic' and 'Advanced'. The 'Basic' tab is active. Below the tabs, there are several input fields for employee information. A callout box labeled 'Find Tabs' points to the 'Basic' and 'Advanced' tabs. Below the input fields, there are five buttons: 'Find', 'Cancel', 'Details', 'Save As', and 'Clear'. Below the buttons is a table with five columns: 'Full Name', 'NI Number', 'Date of Birth', 'Person Type', and 'Supervisor'. A callout box labeled 'Find Folder' points to the first row of the table. At the bottom left, there is the iTrain Education logo and the text 'iTrain Education Oracle SAP Java'. At the bottom right, there is the website address 'www.iTrainOnline.co.uk'.

Full Name	NI Number	Date of Birth	Person Type	Supervisor

Summary

- First Glance at HRMS Data
- 2 Components
 - Navigator – To quickly traverse HRMS People
 - Summary Section – To see the data



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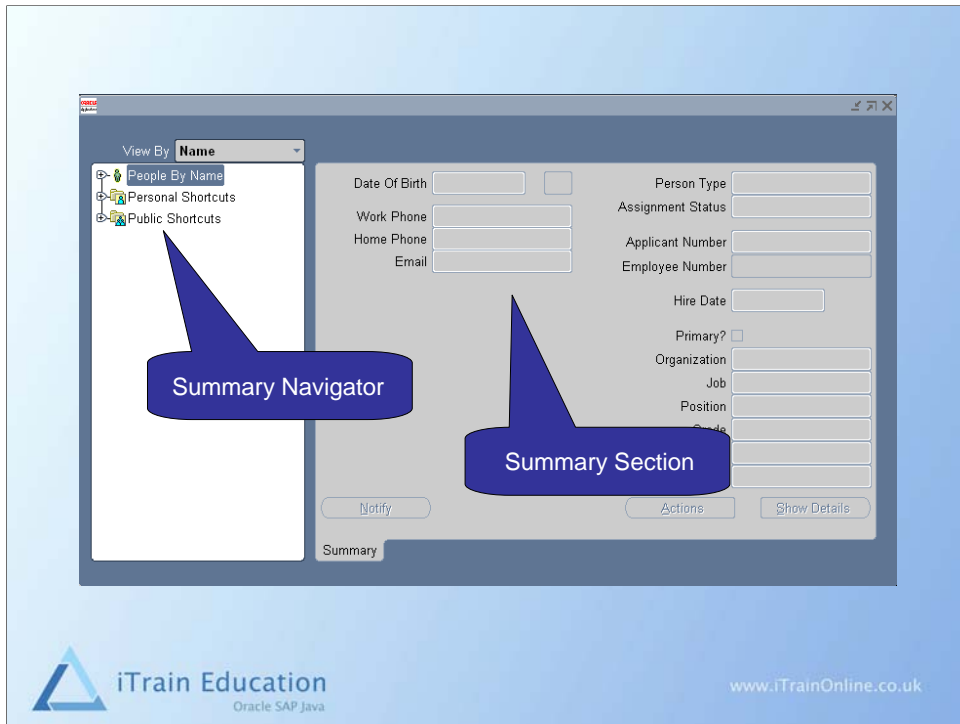
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The summary screen enables users to see a summary of people before they invoke the maintenance screen to view full details and edit that person.

The summary screen has 2 sections, the summary navigator where you can navigate for people and the main summary section that shows you details on the selected person.

The summary navigator can't be customised but the tab(s) and items that make up the summary details can be.

HRMS Forms Configurator



Maintain

- Main Window for working with data
- Up to 10 tabs available to separate data
- Optional Datetrack Bar is available
- Optional Buttons to perform tasks



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The maintain window is the main window for editing person information, it can have up to 10 tabs associated an items that display employee/applicant information.

HRMS Forms Configurator

The screenshot displays the HRMS Forms Configurator interface for an employee record. The window title is "(EMPLOYEE, Mr DUMMY): 01/10/2005". At the top, there is a "Datetrack Bar" showing a date range from 01/10/2005 to 01/01/2006, with a green arrow indicating the current date range. Below this is a "Personal" tab, which is highlighted by a blue callout labeled "Tabs". The form contains various fields for personal information, including Title (Mr), First Name (DUMMY), Middle Names, Last Name (EMPLOYEE), Email Address, Mobile Phone, Home Phone, Date Of Birth (01/01/1951), Employee Number (100000), NI Number (AA999999A), Hire Date (01/10/2005), Gender (Male), Marital Status, Ethnic Origin, Disabled?, and NI Multiple Assign. At the bottom, there is an "Action on Existing Information" section with radio buttons for "Correction" and "Update" (selected), and an "Actions" button. Below this are several buttons: "Address", "Grade Step", "Egtries", "Pay Method", and "Others...". A blue callout labeled "Buttons" points to the "Address" button. The bottom of the screen features the iTrain Education logo and the website address www.iTrainOnline.co.uk.

Datetrack Bar

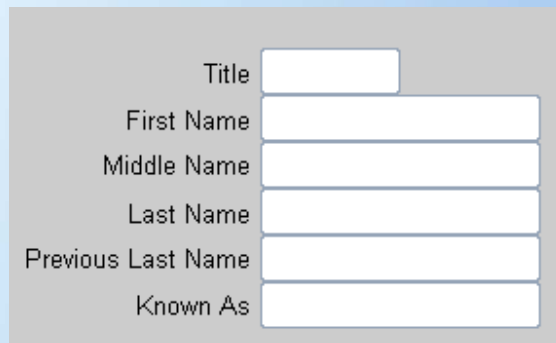
Tabs

Buttons

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Items

- Each Field to Display / Enter Data



A screenshot of a form with six input fields. The fields are labeled as follows:

Title	<input type="text"/>
First Name	<input type="text"/>
Middle Name	<input type="text"/>
Last Name	<input type="text"/>
Previous Last Name	<input type="text"/>
Known As	<input type="text"/>



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Full list of available items in Oracle Human Resources Management Systems
Configuring, Reporting, and System Administration Guide Page 3-206

Accessing Forms Configurator

- Navigation Varies
 - Security > People Management Configurator
- Select a Template
- Copy a Template

Find Templates

Template Code: PER_MAINTAIN_EMPS

Template Name: UK Maintain Employees

Enabled: Yes

Legislation: United Kingdom

Description:

New Edit Copy Cancel

Copy From

Template Code: PER_MAINTAIN_EMPS

Template Name: UK Maintain Employees

Enabled: Yes

Legislation: United Kingdom

Copy To

Template Code: CUST_MAINTAIN_EMPS

Template Name: Custom UK Maintain Empls

Enabled: Yes

Legislation: United Kingdom

OK Cancel



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Predefined Templates

There are a number of predefined templates that can be used to customise the people management screens. It is recommended that should you wish to change the people management forms then you should copy and customise one of these templates.

The templates that come predefined are :

Hiring Applicants

Entering Employees

Maintaining Employees

Visa Administration

Find Template

To begin using the forms configurator navigate Security > Forms Configurator. This will present you with the Find Template window

Use this window to find an existing template , either a predefined one or one you have previously customised.

Choose the template from the picklist associated with template code.

If the template you choose is a predefined one you are not able to edit, however you can edit templates you have previously copied.

To create a copy of a predefined template to customise select Copy

Copy Template

Once you have found the template you wish to copy you will be shown the copy template window.

Enter the following information:

Template Code - A short, unique code for the new template. This can be up to 30 characters long

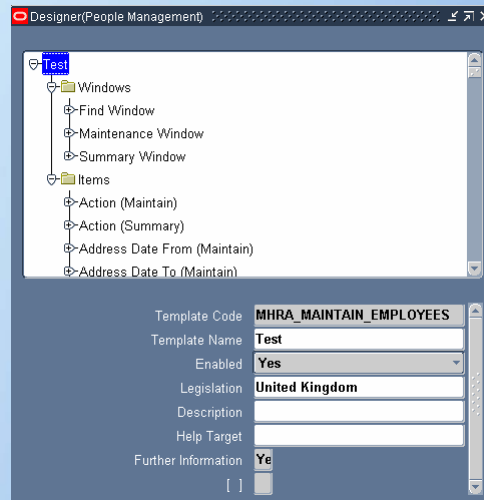
Template Name - A name for the template this can be up to 80 characters long

Enabled - Select whether or not to enable the template from the outset

Legislation - Pick a legislation to apply to the template, or leave blank for global.

Building a Template

- The navigator
 - Navigator
 - Properties



We will use the navigator to define and set properties for all the windows, canvases, tabs and items (fields) that we wish to use in our final template.

The navigator is made up of 2 distinct sections, the top section lets us navigate through the components of the template and works in a similar way to the main navigator menu or any other hierarchical navigator (Windows Explorer etc)

The second part of the navigator enables you to set options (properties) for the component you have selected in the top section of the navigator, that is the bottom section is context sensitive when you change your selection in the top half of the navigator the bottom section will change to display the properties of that section.

Building a Template

- The Preview
 - Select a window to see a preview

The screenshot shows a web-based form titled "All Person" with a "Go" button and a dropdown menu. Below the title are tabs for "Personal", "Communication", "Assignment", "Compensation", "Schedule", and "Agreement". The "Personal" tab is active, displaying a form with the following fields and options:

- Title
- First Name
- Middle Name
- Last Name
- Previous Last Name
- Known As
- Person Type
- Gender
- Marital Status
- Nationality
- Ethnic Origin
- Work Permit No.
- Date Of Birth
- Age
- NI Number
- Employee Number
- Additional NI Assignments
- Pensioner?
- Director?
- Additional Pension Details: Years Months Days

At the bottom of the form, there are buttons for "Find Duplicates", "Apply", and "Action". Below these buttons is a section for "Action on Existing Information" with radio buttons for "Correction" and "Update".



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The preview window enables you to see exactly what the window you are configuring will look like. The example is of the maintain window, although the same applies to the find and summary windows.

Properties

- Each Component has properties
 - Template
 - Windows
 - Tabs
 - Items
- Properties control
 - Functionality
 - Visual representation







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Window Properties

- Include

Title	Title of the Window
Height	Height of the Window in Inches
Width	Width of the Window in Inches
X Position	The horizontal position of the component, type a value or use the  or  buttons to position it.
Y Position	The vertical position of the component, type a value or use the  or  buttons to position it.



The screenshot shows a configuration window titled "Summary Window". It contains several input fields: "Title" (empty), "Height" (value 5), "Width" (value 8.7), "X Position" (value 0), and "Y Position" (value 0). To the right of the X and Y position fields are four directional arrow buttons (left, up, down, right) for adjusting the values.



Items

- There is a limited list of approx 225 items
- For full list
 - Oracle Human Resources Management Systems Configuring, Reporting, and System Administration Guide
Page 3-206
- Flexfields
 - Displayed as entire Flexfield
 - Displayed as each field in the Flexfield



Item Properties

- Key Properties

Visible	Set this to Yes if you want the field to be displayed to the user. If it is set to No, the user will not see the field but the field and its value are still in use.
Height and Width	Sets the height of the field in inches.
X Position and Y Position	Sets the position of the field using co-ordinates. Alternatively, you can use the arrow keys to move the field around.
Enabled	Specifies whether the user can put their cursor into this field.
Required	Set this to Yes if you want to make the field mandatory.
Query Allowed	This property is ignored in the People Management templates. You can only run queries using the Find window.
Insert Allowed	Specifies whether the user can insert new data in this field. If this is set to No for a field or button then it appears greyed out in the window.



Item Properties

- Key Properties

Update Allowed	Specifies whether the user can enter information in the field and save it to the database.
Prompt Text	Defines what text is displayed with the field.
Tooltip Text	You can enter text here that displays when the user has the mouse pointer over the field.
Previous Item	Specifies which field will be tabbed to next if you tab backwards.
Next Item	Specifies which field will be tabbed to next.
Default Value	You can set the default value for the field here/
Format Mask	You can apply a format style to number and date type fields so that the format is correct for your users.
Alignment	Defines the alignment of text within the item (left, centre, or right).



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Task Flow

- Can be used to control buttons at bottom of:
 - Template Maintenance window
 - Standard People Enter & Maintain Form
- Button goes to standard HRMS screen e.g.
 - Address
 - Picture
 - Grade Step
 - Salary
 - Pay Method



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The task flow functionality of Oracle HRMS enables you to configure task flows or 'paths' through your Oracle HRMS Application.

This is achieved by customising the buttons that appear at the bottom of a number of customisable forms such as People, Job, Position or HRMS Configurator Templates

HRMS Forms Configurator

The image displays two overlapping screenshots of the HRMS Forms Configurator interface. The top screenshot shows a 'Person' form with tabs for 'Personal', 'Add. Educ. Details', and 'Assignment'. The 'Personal' tab is active, showing fields for 'Person Type' (Employee), 'Address Type' (Home), 'Title', 'First Name', 'Middle Names', 'Last Name', 'Email Address', 'Mobile Phone', 'Home Phone', 'Date Of Birth', 'Employee Number', 'NI Number', 'Hire Date', 'Gender' (Female), 'Marital Status', 'Ethnic Origin', 'Disabled?', and 'NI Multiple Assign.'. Below these fields are buttons for 'Address', 'Grade Step', 'Edges', 'Pay Method', and 'Others'. The bottom screenshot shows an 'Assignment' form with tabs for 'Salary Inform.', 'Supervisor', 'Probation', 'Standard', 'Statutory', 'Miscellan.', 'Special C.', and 'Project I.'. The 'Salary Inform.' tab is active, showing fields for 'Organization' (Human Resource), 'Job' (100001.VICE PRF), 'Grade' (Pay.B.Exempt), 'Location' (Vicen University), 'Assignment Number' (1), 'Assignment Category' (Fulltime-Regular), 'Collective Agreement', 'Employee Category', 'Salary Basis' (Exempt), 'Review Salary' (Every 1 Year), and 'Review Performance' (Every 1 Year). Below these fields are buttons for 'Salary', 'Edges', 'Type Information', and 'Others'. A blue box labeled 'Taskflow Buttons' has three arrows pointing to the 'Address' button in the top form, the 'Update' button in the top form, and the 'Salary' button in the bottom form.

Taskflow Buttons

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Install and Maintenance

- The templates can be:
 - Installed
 - Giving users access to them from menus
 - Maintained
 - Exported (Backed Up)
 - Imported (Restored)



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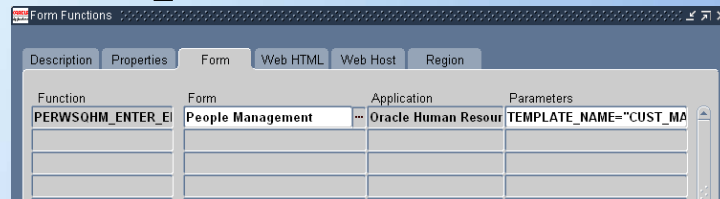
Installation

- Usually performed by Sysadmin
 - Create a function based on people management form

– Add

`TEMPLATE_NAME="name of your template"`

`WORKFLOW_NAME="name of your taskflow"`



Function	Form	Application	Parameters
PERWSOHM_ENTER_EI	People Management	Oracle Human Resour	TEMPLATE_NAME='CUST_MA



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Function

Create a function by using the System Administration or Application Developer responsibility and navigating Application > Function

Define your function ensuring you pick the correct form from the Form picklist (Usually People Management), then in the parameters field specify `TEMPLATE_NAME=""` where `CUST_MAINTAIN_EMPS` is the Template customization you created with Forms Configurator

Installation

- Once function is created add to a menu

Seq	Prompt	Submenu	Function	Description	Grant
6	Payroll	GLB HR PAYROLL		Enter information for payrolls	<input type="checkbox"/>
7	Total Compensa	GLB HR TOTAL COMP		Enter information on compensati	<input checked="" type="checkbox"/>
8	View	GLB HR VIEW INFO		View HRMS information	<input checked="" type="checkbox"/>
9	Processes and F	GLB HR PROCESS AND			<input checked="" type="checkbox"/>
10	Transaction Mai	GLB HR MAINT FORMS			<input checked="" type="checkbox"/>
11	Mass Informatio	GLB HR MASS INFO EX		Interfaces and Batch Entry Option	<input checked="" type="checkbox"/>
12	Other Definition	GLB HR OTHER DEF		Other Definitions	<input checked="" type="checkbox"/>
13	Security	GLB HR SECURITY		Define security restrictions	<input checked="" type="checkbox"/>
14			Navigator: Disable Multi		<input checked="" type="checkbox"/>
15	Customised For		Customised People Man		<input checked="" type="checkbox"/>



Menu

Once you have defined the function and added the TEMPLATE parameter you can then add the function to a menu, navigate Application > Menu (still using the System Administrator responsibility)

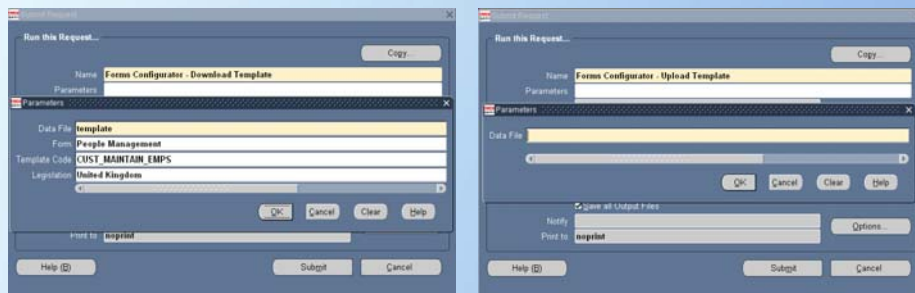
Query for the menu you wish to add your customised Form to.

Enter a prompt for the menu entry and then choose the function you created in the previous step from the function picklist.

The Template customized form can then be selected from the relevant menu.

Import & Export

- Use Concurrent Requests
 - Download Template – Export
 - Upload Template – Import



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Because templates will be lost if you upgrade Oracle Applications you can Import and Export them, this can also be useful to move templates from a test to production environment.

Export

To export the templates Navigate Process and Reports > Submit Process and Reports

Choose to submit the Forms Configurator – Download Template request.

You will be prompted for a datafile path and name to save the export file to.

You can then select Form, Template and Legislation if any are left blank then all items of that type will be exported.

Import

The import process is the opposite of the export.

Select the Forms Configurator – Upload Template request.

Then simply specify the path and file name of your previously exported file.

When the request has completed you will be able to use that template to customize forms.

Questions?

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