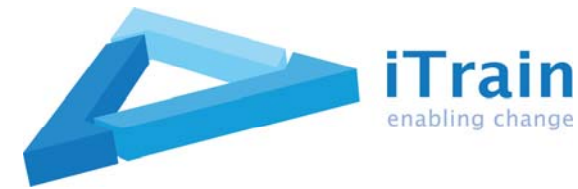




# HRMS Forms Configurator

Presented By  
Lewis Curley  
iTrain

# Introduction



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

# Benefits

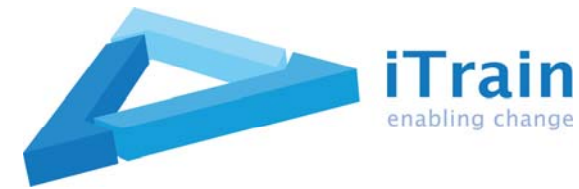


- Customisable HRMS Screens
- Reduce the screens users need to learn
- Increase data input
- More efficient data retrieval

# Components

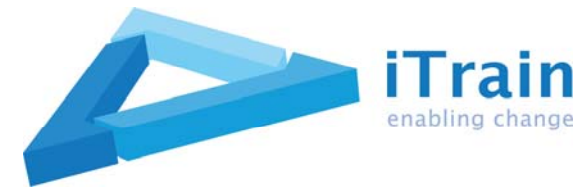
- Templates
- Windows
  - Find
  - Summary
  - Maintain
- Tabs
- Items

# Templates

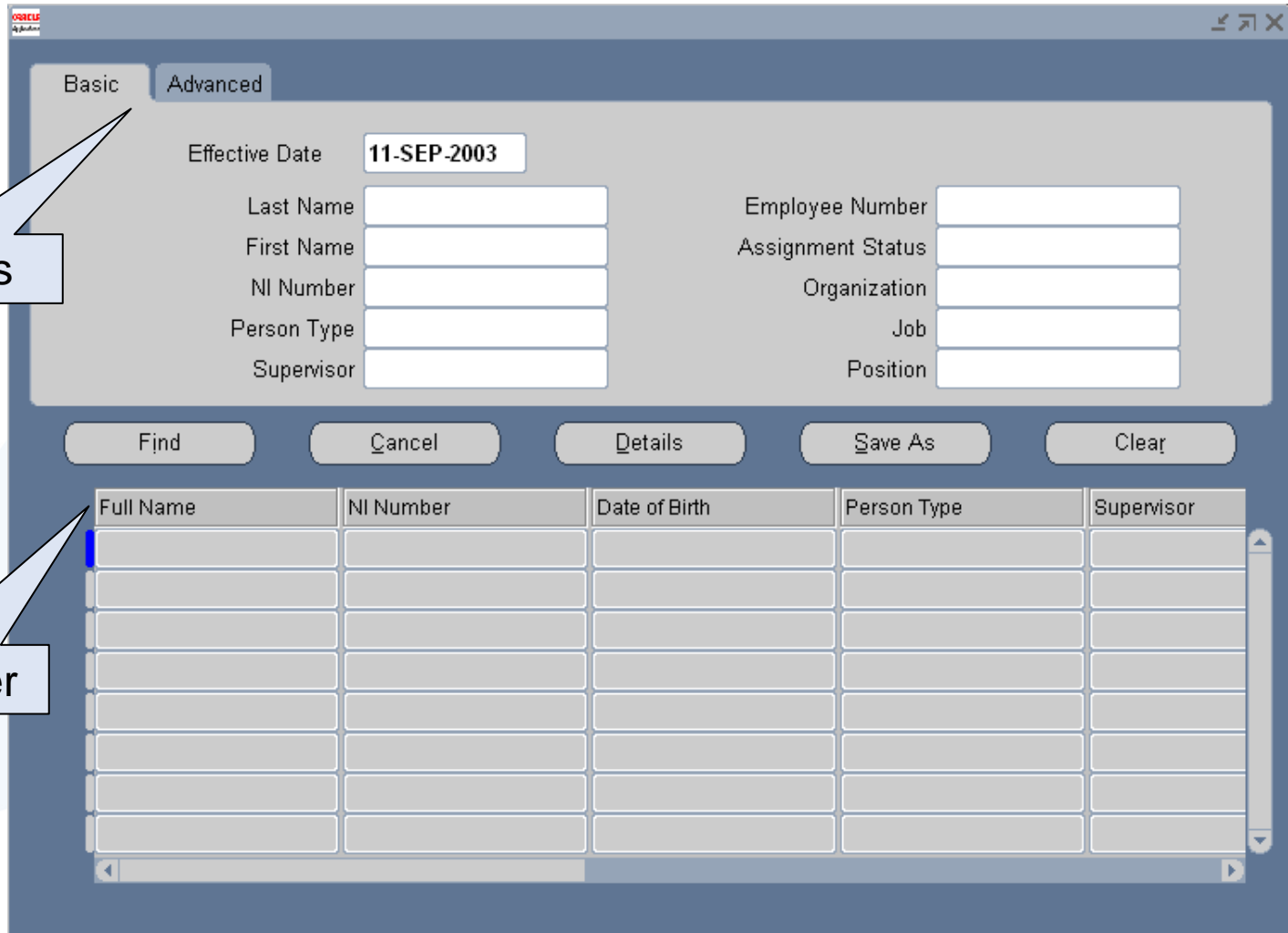


- Basis of the customisation
- Encompasses all other components
- Some pre-defined Templates

# Find Window



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



Basic Advanced

Effective Date **11-SEP-2003**

Last Name

First Name

NI Number

Person Type

Supervisor

Employee Number

Assignment Status

Organization

Job

Position

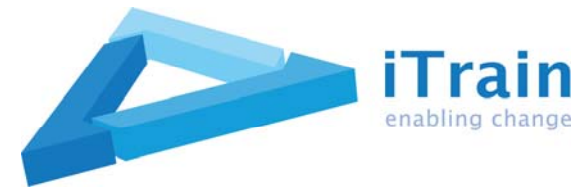
Find Cancel Details Save As Clear

Full Name	NI Number	Date of Birth	Person Type	Supervisor

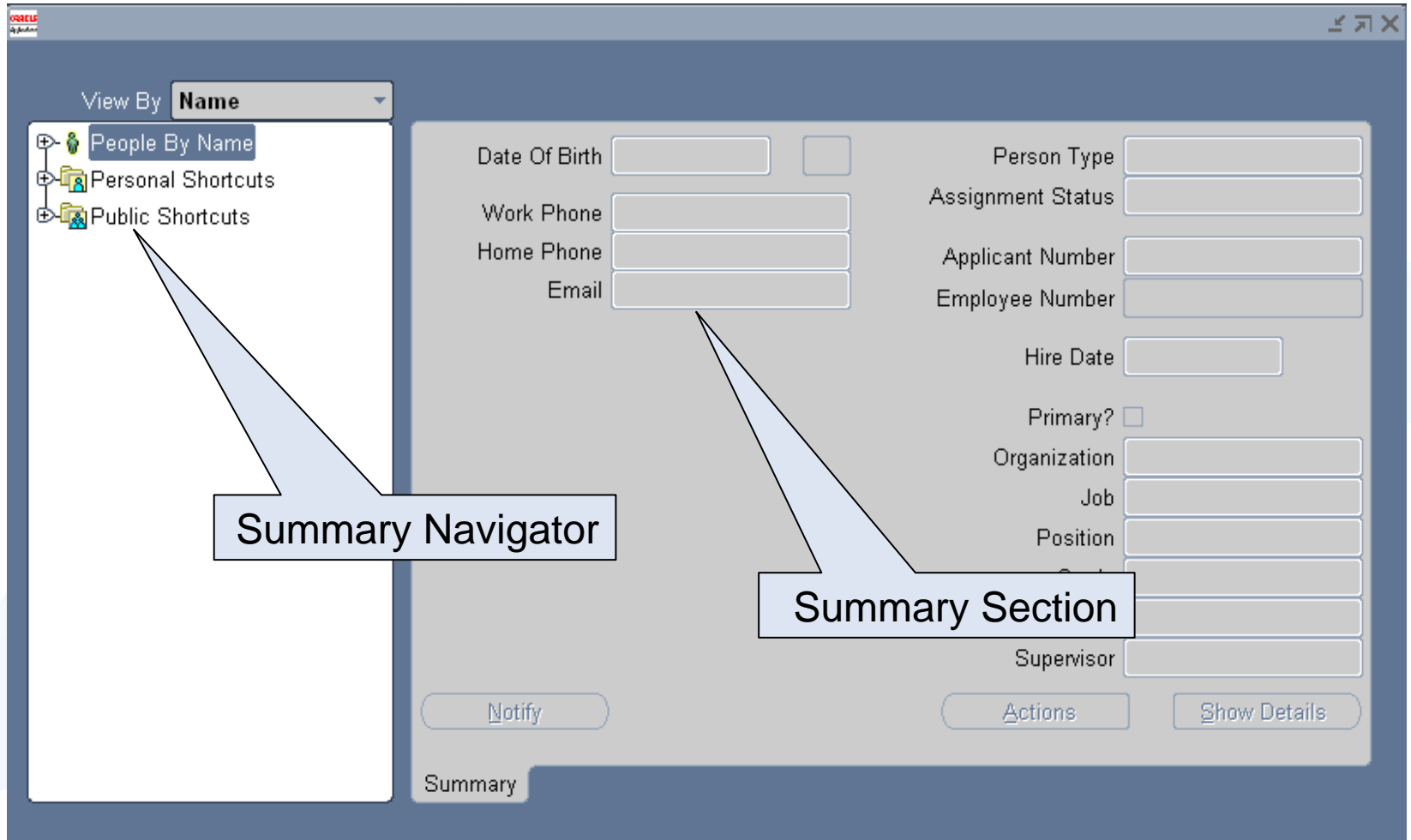
Find Tabs

Find Folder

# Summary



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



View By **Name**

- People By Name
- Personal Shortcuts
- Public Shortcuts

**Summary Navigator**

**Summary Section**

Date Of Birth

Work Phone

Home Phone

Email

Person Type

Assignment Status

Applicant Number

Employee Number

Hire Date

Primary?

Organization

Job

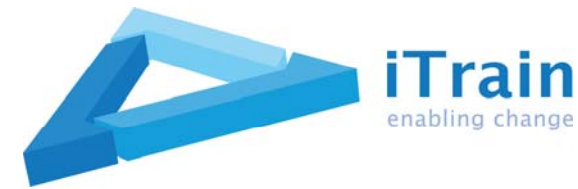
Position

Supervisor

[Notify](#) [Actions](#) [Show Details](#)

Summary

# 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

(EMPLOYEE, Mr DUMMY): 01/10/2005

01/10/2005 Go 01/04/2005 01/07/2005 01/10/2005 01/01/2006

All Person

Personal Add. Educ. Details Assignment

Person Type **Employee** Address Type

Title **Mr**

First Name **DUMMY**

Middle Names

Last Name **EMPLOYEE**

Email Address

Mobile Phone

Home Phone

Gender **Male**

Marital Status

Ethnic Origin

Disabled?

NI Multiple Assign.

Date Of Birth **01/01/1951**

Employee Number **100000**

NI Number **AA999999A**

Hire Date **01/10/2005**

Action on Existing Information  
 Correction  Update

Buttons: Address, Grade Step, Entries, Pay Method, Actions, Others...

Date track Bar

Tabs

Buttons

- Each Field to Display / Enter Data

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"/>

# Accessing Forms Configurator

- Navigation Varies
  - Security > People Management Configurator

- Select 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 a Template



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 Emps

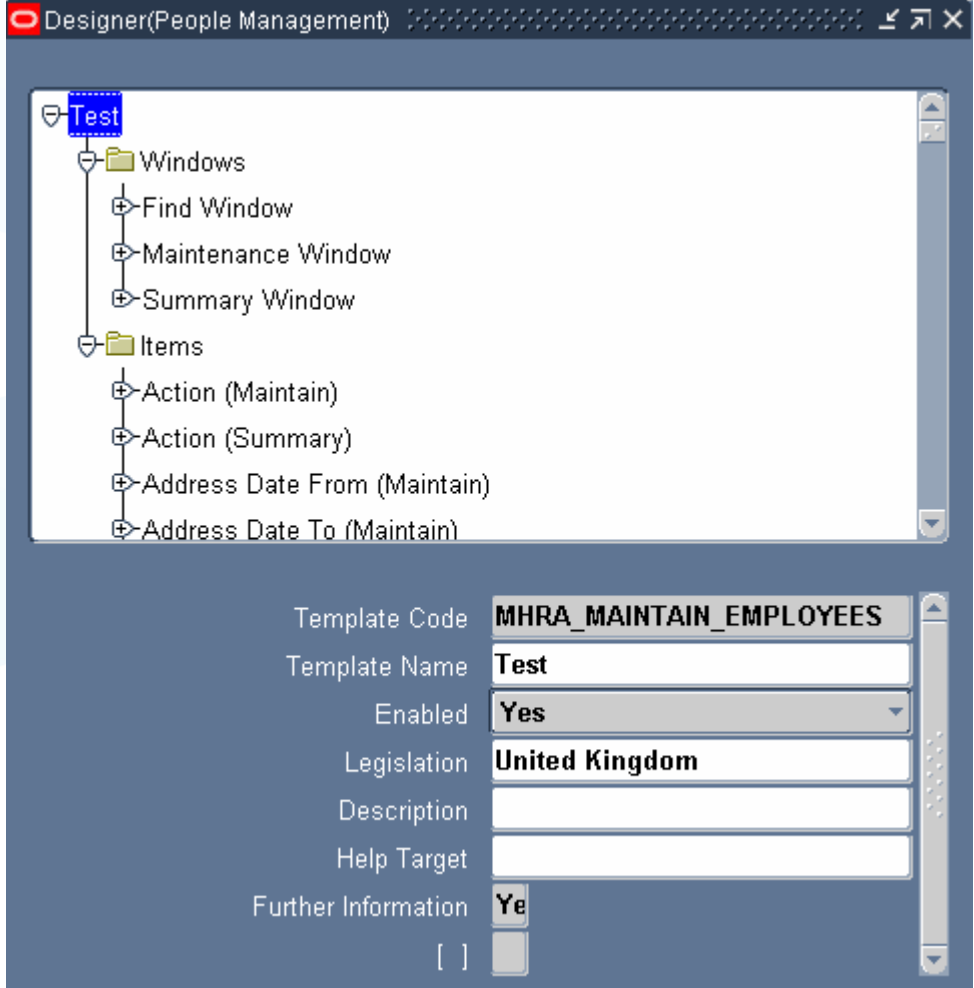
Enabled: Yes

Legislation: United Kingdom

OK Cancel

# Building a Template

- The navigator
  - Navigator
  - Properties



Designer(People Management)

Test

- Windows
  - Find Window
  - Maintenance Window
  - Summary Window
- Items
  - Action (Maintain)
  - Action (Summary)
  - Address Date From (Maintain)
  - Address Date To (Maintain)

Template Code: **MHRA\_MAINTAIN\_EMPLOYEES**

Template Name: **Test**

Enabled: **Yes**

Legislation: **United Kingdom**

Description:

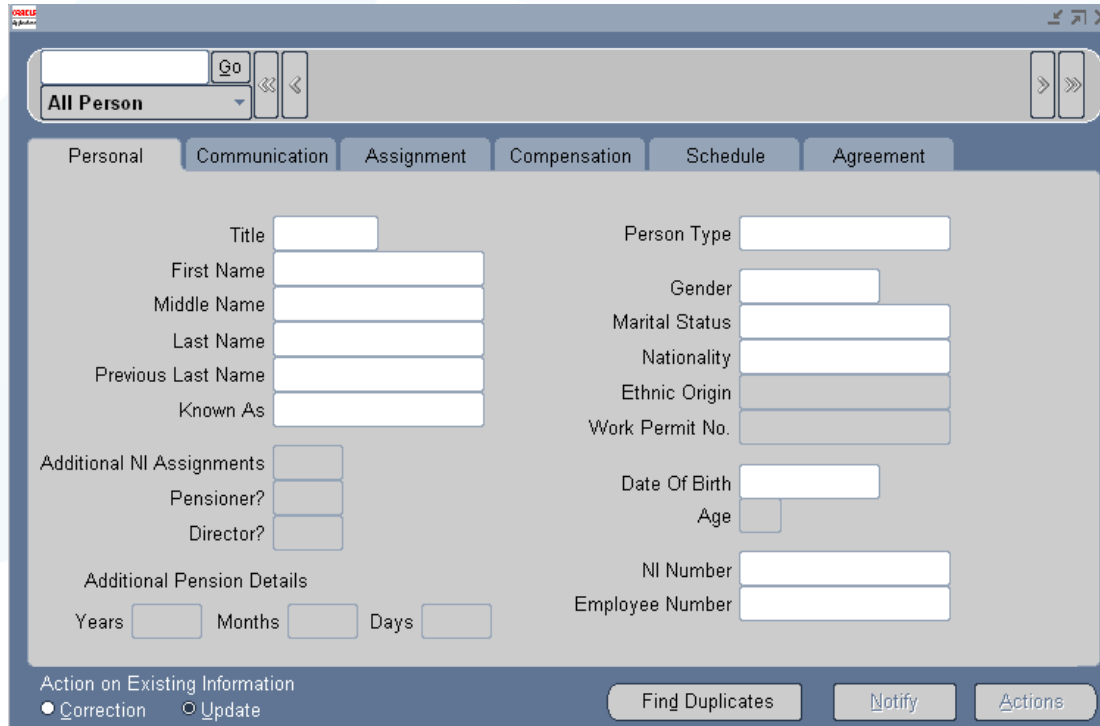
Help Target:

Further Information: **Ye**

[ ]

# Building a Template

- The Preview
  - Select a window to see a preview



**Person**

**All Person**

Personal **Communication** Assignment Compensation Schedule Agreement

Title

Person Type

First Name

Gender

Middle Name

Marital Status

Last Name

Nationality

Previous Last Name

Ethnic Origin

Known As

Work Permit No.

Additional NI Assignments

Date Of Birth

Pensioner?

Age

Director?

Additional Pension Details

NI Number

Years  Months  Days

Employee Number





Action on Existing Information  
 Correction  Update

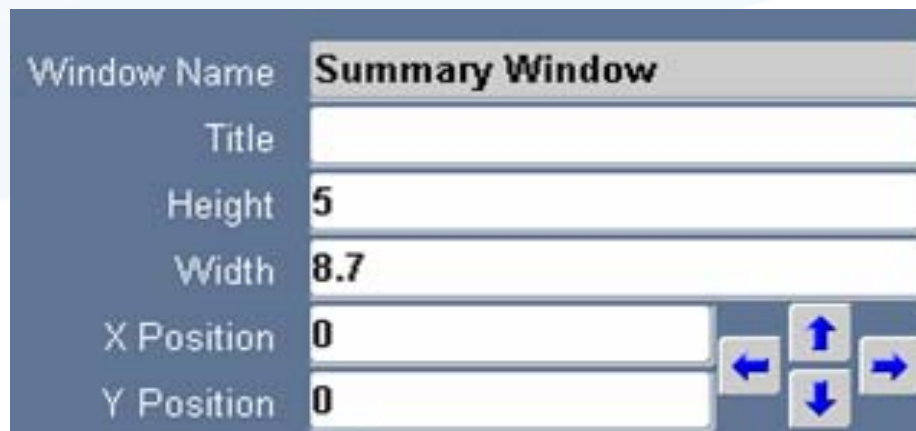
# Properties

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

# Window Properties

- Include

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







Window Name **Summary Window**

Title

Height **5**

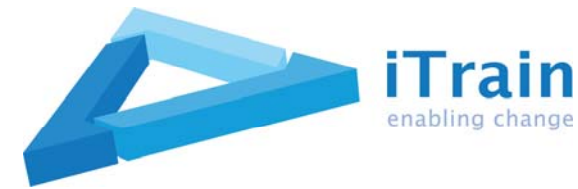
Width **8.7**

X Position **0**   

Y Position **0** 

- 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

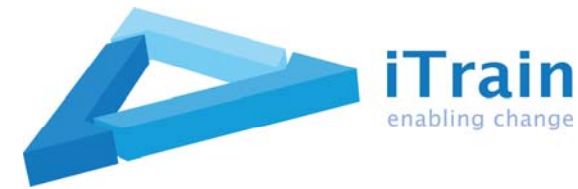
# Item Properties



- Key Properties

<b>Visible</b>	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.
<b>Height and Width</b>	Sets the height of the field in inches.
<b>X Position and Y Position</b>	Sets the position of the field using co-ordinates. Alternatively, you can use the arrow keys to move the field around.
<b>Enabled</b>	Specifies whether the user can put their cursor into this field.
<b>Required</b>	Set this to Yes if you want to make the field mandatory.
<b>Query Allowed</b>	This property is ignored in the People Management templates. You can only run queries using the Find window.
<b>Insert Allowed</b>	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.

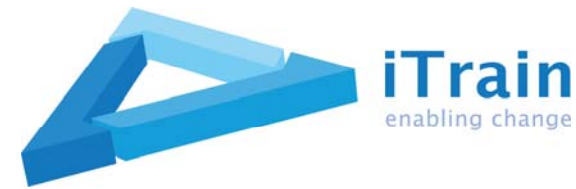
# Item Properties



- Key Properties

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

# 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

01/10/2005

01/10/2005  01/04/2005 01/07/2005 01/10/2005 01/01/2006

All Person

Personal Add. Educ. Details Assignment

Person Type **Employee** Address Type **Home**

Title

First Name

Middle Names

Last Name

Email Address

Mobile Phone

Home Phone

Gender

Date Of Birth

Employee Number

NI Number

Hire Date

Marital Status

Ethnic Origin

Disabled?

NI Multiple Assign.

Action on Existing Information  
 Correction  Update

Address Grade Step Entries Pay Method Others...

Gender **Female** Action

Person Type for Action

Person Types  
**Contact**

Identification

Social Security

Applicant Background Rehire Further Name Medical Other Benefits

Age **42**

Status

Nationality

Registered Disabled

Assignment(Peterman, Mr. Jay)

Organization **Human Resource**

Job **100001.VICE PRE**

Grade **Pay.8.Exempt**

Location **Vision University**

Effective Dates  
From **10-MAY-2002** To

Latest Start Date

Address Picture Assignment Special Info Others...

Assignment Number **1**

Assignment Category **Fulltime-Regular**

Collective Agreement

Employee Category

Salary Inform... Supervisor Probation... Standard... Statutory... Miscellan... Special C... Project I...

Salary Basis **Exempt**

Review Salary  
Every **1** Year

Review Performance  
Every **1** Year

Effective Dates  
From **01-JAN-1999** To

Salary Entries Tax Information Others...

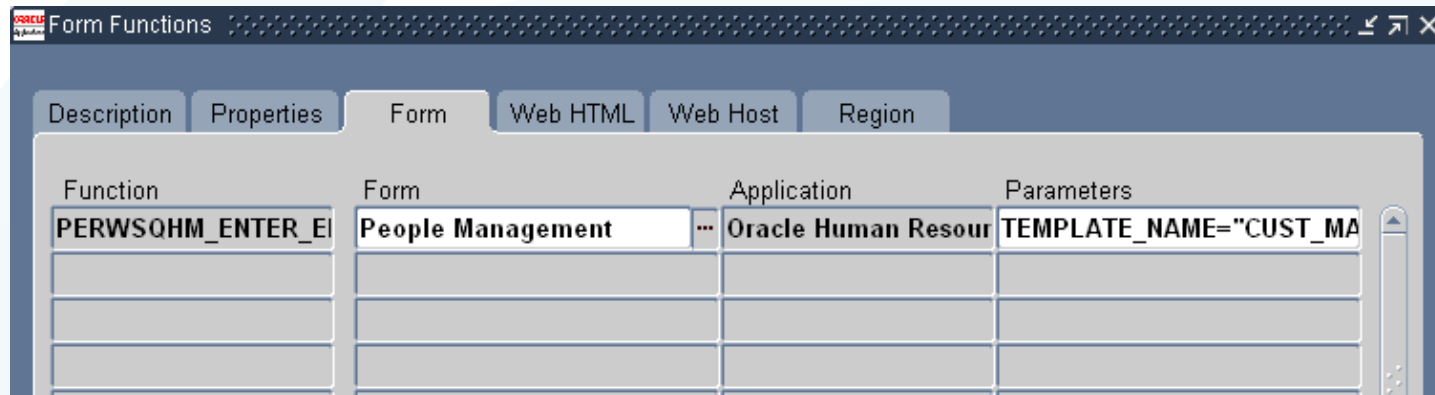
Taskflow Buttons

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

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

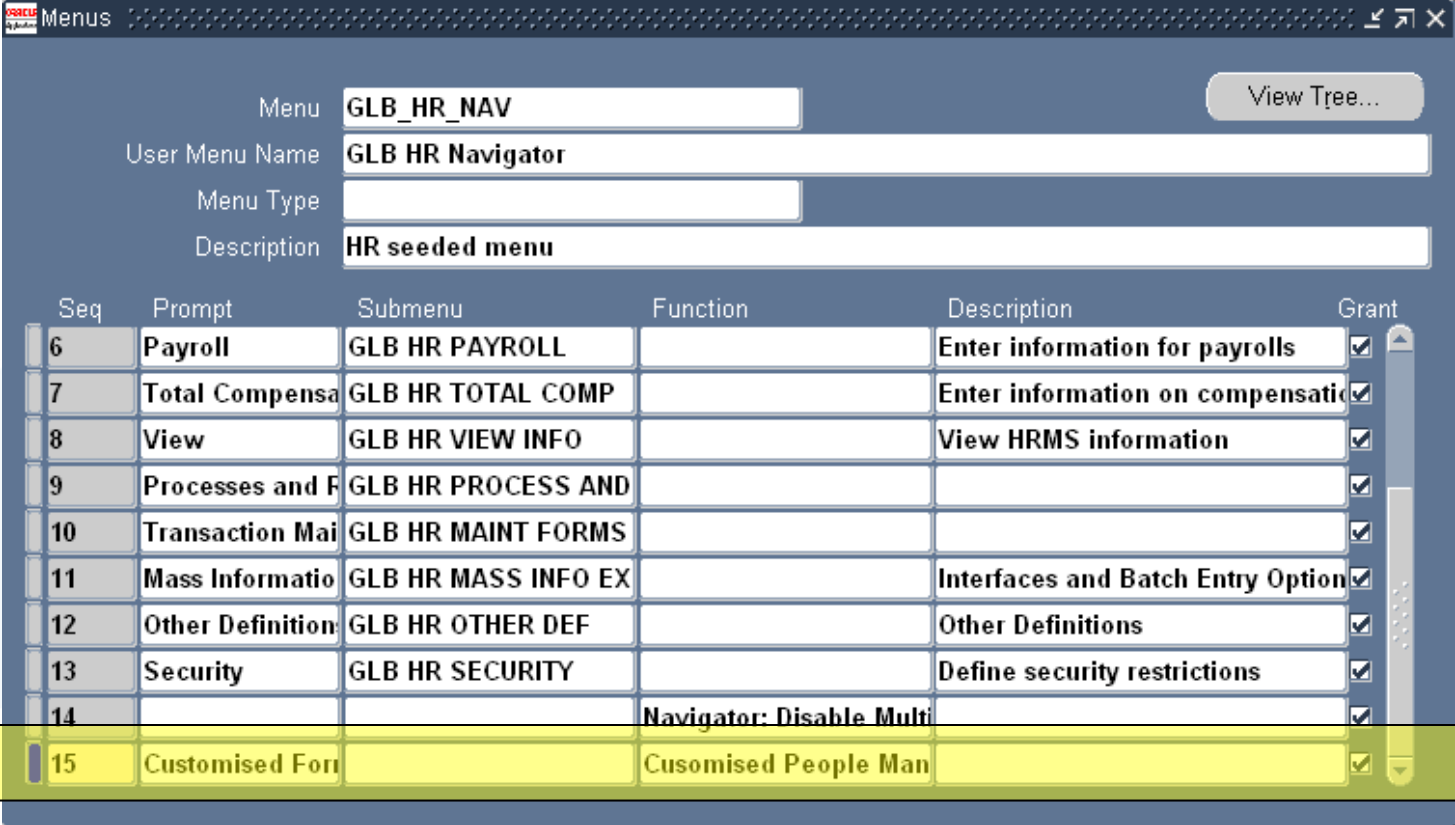
```
TEMPLATE_NAME="name of your template"
```

```
WORKFLOW_NAME="name of your taskflow"
```



# Installation

- Once function is created add to a menu



Menu:  View Tree...

User Menu Name:

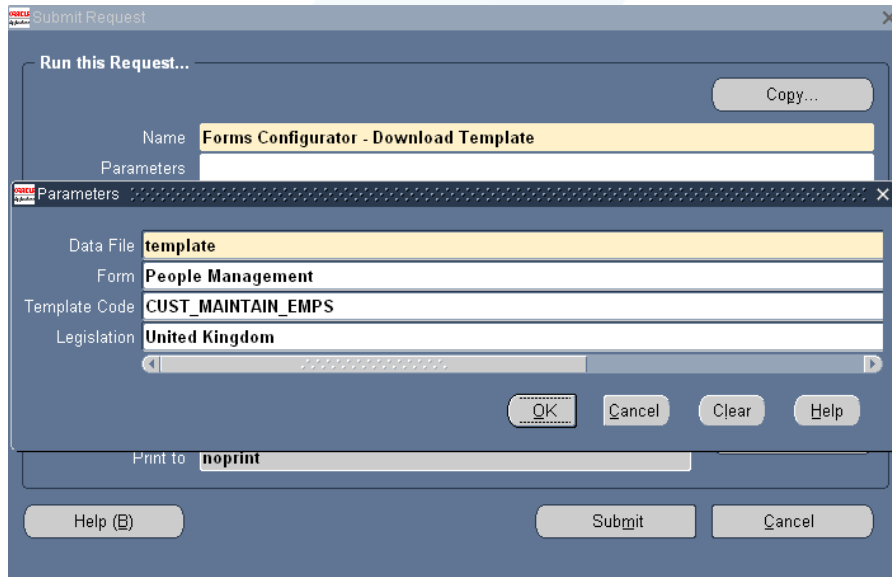
Menu Type:

Description:

Seq	Prompt	Submenu	Function	Description	Grant
6	Payroll	GLB HR PAYROLL		Enter information for payrolls	<input checked="" type="checkbox"/>
7	Total Compensa	GLB HR TOTAL COMP		Enter information on compensatio	<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 Form		Customised People Man		<input checked="" type="checkbox"/>

# Import & Export

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



Submit Request

Run this Request...

Name **Forms Configurator - Download Template**

Parameters

Parameters

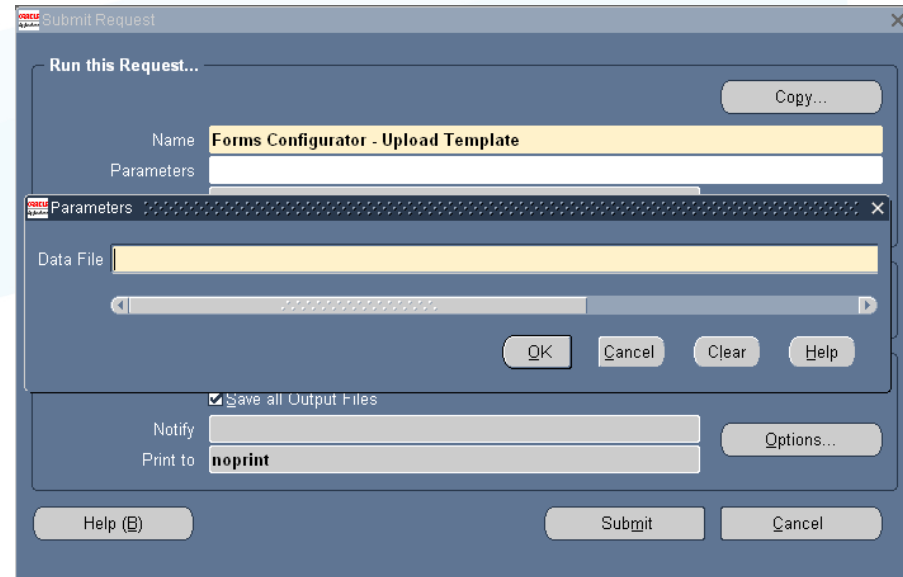
Data File **template**

Form **People Management**

Template Code **CUST\_MAINTAIN\_EMPS**

Legislation **United Kingdom**

Print to **noprint**



Submit Request

Run this Request...

Name **Forms Configurator - Upload Template**

Parameters

Parameters

Data File

Save all Output Files

Notify

Print to **noprint**

**Thank you for your time**

**Lewis Curley  
iTrain  
Stand 32**