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Customize Payroll Check Template in R12



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In this section we will explain how to set up and use a custom template with Check Writer(XML). Please follow the steps below to complete the setup of the custom templates for this report.

Step 1: Registering the Custom Template

- a. Switch to the XML Publisher Administrator responsibility.
- b. Navigate to Templates -> Create Template.
- c. Enter the following fields:

Name: Enter an appropriate name, e.g. 'DEMO Template for Check Writer'

Code: Enter the code such as '%_PDF' to indicate that this template will be used for generating the PDF file. This format is mandatory, e.g. DEMOUSHKWXXML_PDF.

Application: Select 'Payroll'.

Data Definition: Select 'Check Writer XML'.

Type: Select 'RTF'.

Start Date: Enter a date prior to today's date.

Subtemplate: Select 'No'.

Description: Enter any description of your choice.

File: Browse to select the desired template file. Make sure this file is the one to be used for PDF file generation.

Language: Select 'English'.

Territory: Select 'United States'.

- d. Click on Apply.

Step 2: Grouping Related Templates

- a. Switch to the Application Developer responsibility.
- b. Navigate to Application -> Lookups -> Common.
- c. Enter the following fields :

Type: Enter an appropriate name. The name should be in a format like '%US%PAYARCHCHQW%'. The format is mandatory, e.g. 'DEMO_US_PAYARCHCHQW_CUST'.

Meaning: Enter an appropriate meaning here as this will be displayed as the Template Group in the report, e.g. 'DEMO Template for Check Writer (XML)'.

Application: Select 'Payroll'.

Code: Enter the code used to register the template, e.g. 'DEMOUSHKWXXML_PDF'.

Meaning: Re-enter the same template code again (i.e. re-use the Code as the Meaning).

From: Enter a date prior to today's date.

- d. Save the record.

Step 3: Registering the Custom Template Group with Oracle Payroll

- a. Switch to your own responsibility (e.g. US Payroll Manager).
- b. Navigate To View -> Request.
- c. Click on Submit a New Request -> OK.
- d. Enter Name as 'Register BI Publisher Templates for Payroll'.
- e. Enter the parameters as follows:

Payroll Process Name: 'Check Writer (XML)'

Template Group: Enter the template group to be registered, e.g. 'Custom Template for Check Writer (XML)'.

f. Click on OK and submit the request.

Step 4: Using the Template Group

- a. Stay in your own responsibility (US Payroll Manager).
- b. Navigate To View -> Request.
- c. Click on Submit a New Request -> OK.
- d. Enter Name as 'Check Writer (XML)'.
- e. Select the Template Group (created in Step 2) in parameter 'Check Style'.
- f. Click on OK and submit the request.