

Ten New Forms and OAF Personalization Examples for R12.1

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Agenda

- Overview of Personalization Tools
- Forms Personalization
 - How It Works
 - Examples 1 - 5
- OA Framework Personalization Examples
 - How It Works
 - Examples 6 - 10
- Migration to other instances
- References

Overview

- Personalizations – alter **behavior** or **appearance** using tools provided by Oracle
- Personalization Tools
 - Professional forms 10g personalization
 - CUSTOM.pll
 - Programmatic tool prior to 11.5.10
 - Professional forms only
 - OA Framework Personalizations

Overview

- Forms 10g Personalizations
 - Requires superuser with some sql skills
 - Survive patching and upgrades
 - Most changes traditionally done using CUSTOM.pll can be accomplished using Forms Personalization
 - Effective immediately – no coding, no compiling
 - Forms personalization and CUSTOM.pll can both be utilized
 - Forms Personalizations fire prior to CUSTOM.pll for the same event

Overview

- Forms Personalizations 10g – How can it help you?
 - Speed up data entry and processing
 - Hide fields, tabs
 - Change order of fields
 - Set default values
 - Call other forms or web address from tool bar
 - Execute processes from tool bar
 - Improve security and audit controls
 - Make fields required
 - Restrict insert or update
 - Adapt to your business rules/self training
 - Change prompts and labels
 - Alter List of Values (LOVs)

Overview

- OA Framework Personalization
 - Introduced with 11.5.9
 - Standard with 11.5.10 and Release 12
- Requires functional super user
 - Minimal technical expertise required
- New features added with each release

Overview

- OAF Personalizations – How can it help you?
 - Speed up data entry and processing
 - Reorder Columns
 - Hide Columns
 - Set Initial Values
 - Improve security and audit controls
 - Remove Buttons
 - Change Field Attributes – make fields required
 - Adapt to your business rules/self training
 - Change Page and Section Headers
 - Change Field and Column Names
 - Change Button Names
 - Add Items (Buttons, Fields, Tips and more)

Forms 10g Personalizations

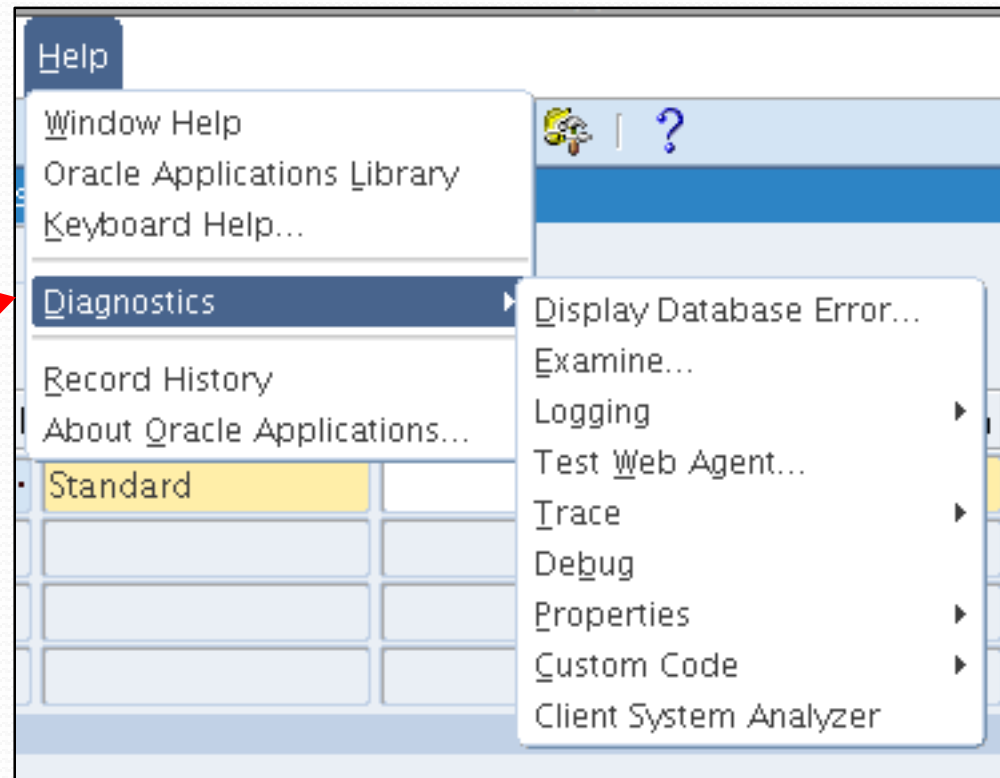
How to use the tool

Examples 1 - 5

Tips

Setup – Profile Options

- Set these profile options at the user level
 - Hide Diagnostics menu entry
 - Set to No to see this menu
 - Utilities: Diagnostics
 - Set to No to require apps password



Setup – Profile Options

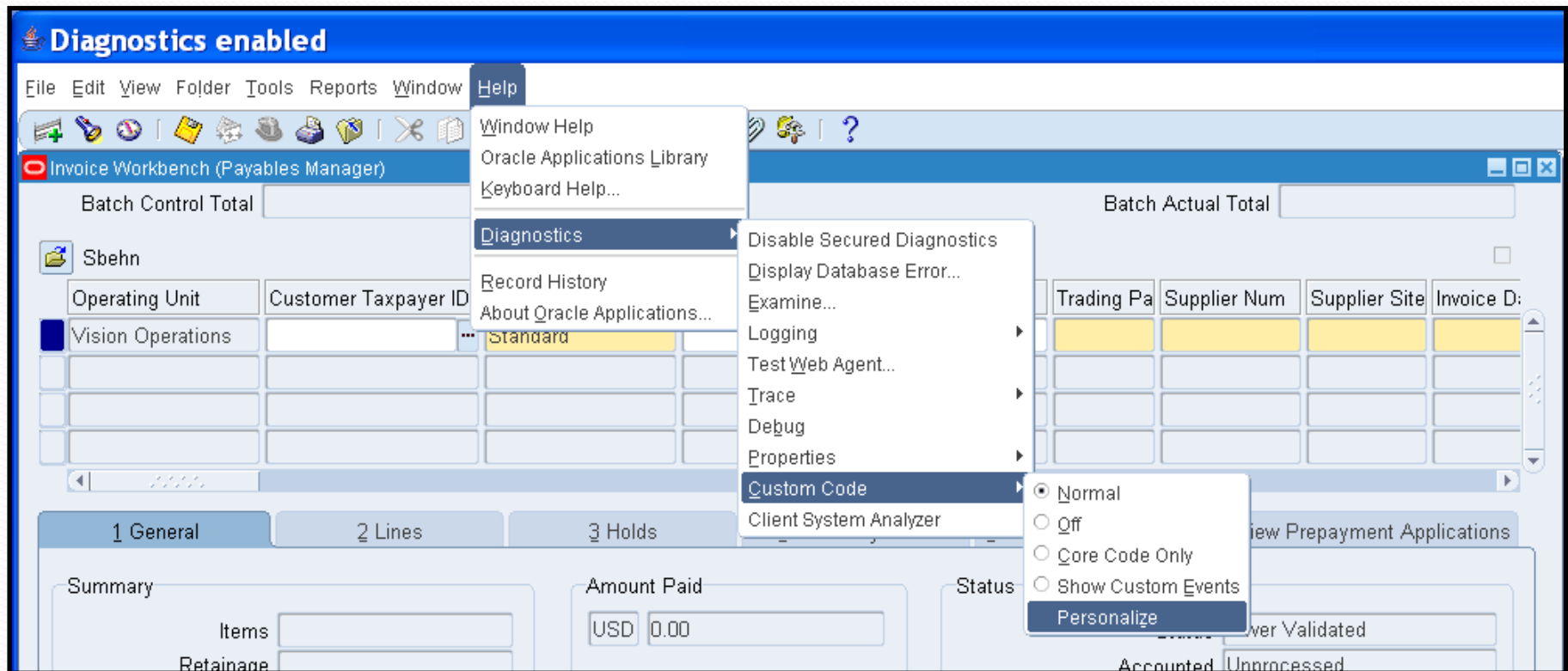
- FND: Enable Industry Editing
 - **New in 12.1.2**
 - Set to Yes to view Oracle-delivered Form Personalizations
 - Provides new ideas or instructions
 - Set to null or No when creating personalizations
 - If set to Yes when creating personalizations, conflicts may be created with Oracle-delivered personalizations

Form Personalization Components

- Event
 - Triggering point for the personalization such as when opening a form or validating a record
- Scope
 - The application context (whom) the personalization applies to (e.g. Site, User, Responsibility)
- Conditions
 - The data conditions under which personalization is evaluated (SQL fragment)
- Actions
 - What steps the personalization actually performs
- Rule
 - Overall personalization specification and identification of function or form level

Accessing Forms Personalization

- Access the form or function needing personalization
- Help → Diagnostics → Custom Code → Personalize



Forms Personalization

The screenshot shows the 'Form Personalizations (Invoices)' window. At the top, there are fields for 'Function Name' (AP_APXINWKB), 'Form Name' (APXINWKB), and 'Debug Mode' (Off). Below these is a table with columns 'Seq', 'Description', 'Level', and 'Enabled'. The first row is highlighted in yellow, with a callout pointing to the 'Seq' column stating '1 - 100 Reusable'. Another callout points to the 'Level' column, showing a dropdown menu with options 'Function', 'Step-by-Step', and 'Off', with 'Function' selected. Below the table are tabs for 'Condition' and 'Actions'. The 'Condition' tab is active, showing fields for 'Trigger Event' (WHEN-NEW-FORM-INSTANCE), 'Trigger Object', 'Condition', and 'Processing Mode' (Not in Enter-Query Mode). At the bottom, there are buttons for 'Insert \'Get\' Expression...', 'Insert Item Value...', 'Validate', and 'Apply Now'. A large blue callout box on the right contains the text: 'Form/Function', 'Default = Function', and 'Most often should be Form'.

Form Personalizations (Invoices)

Function Name: AP_APXINWKB Form Name: APXINWKB Debug Mode: Off

Seq	Description	Level	Enabled
1 - 100	Reusable	Function	<input checked="" type="checkbox"/>

Condition Actions

Trigger Event: WHEN-NEW-FORM-INSTANCE (You can enter additional event names.)

Trigger Object:

Condition:

Processing Mode: Not in Enter-Query Mode

Context:

Level	Value

Insert 'Get' Expression... Insert Item Value... Validate Apply Now

Form/Function
Default = Function
Most often should be Form

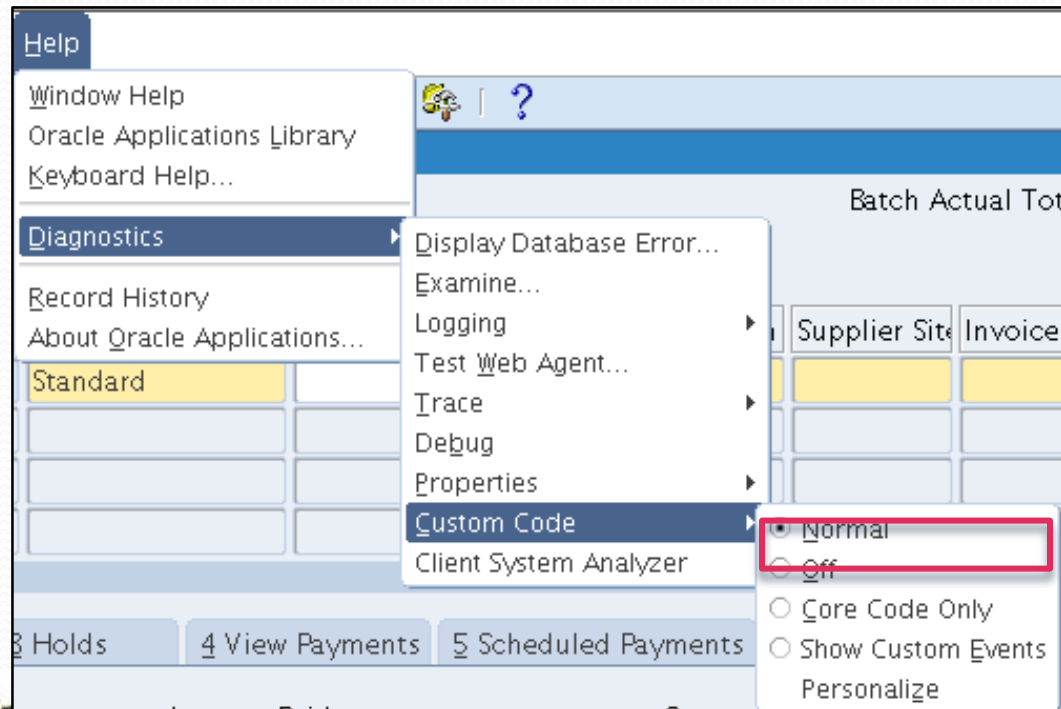
Condition Tab

- Trigger event determines when the rule fires
 - Use any event called by form
 - List of values includes standard trigger events only
 - **Caution:** If typing trigger event, entered text is not validated from LOV
- Trigger object depends on trigger event
 - WHEN-NEW-BLOCK-INSTANCE requires block name

The screenshot shows the 'Condition Tab' configuration interface. The 'Trigger Event' dropdown is set to 'WHEN-NEW-FORM-INSTANCE' with a note '(You can enter additional event names.)'. The 'Trigger Object' field is empty. The 'Processing Mode' dropdown is set to 'Not in Enter-Query Mode'. The 'Context' dropdown is set to 'Only in Enter-Query Mode'. The 'Level' dropdown is set to 'Both'.

Condition Tab

- Use specific events unique to the form **(With Caution)**
 - Oracle does not commit to keeping every event in to form in future patches if form is changed
- Find additional events using Help →Diagnostics →Custom Code →Show Custom Events



Standard Trigger Events

- WHEN-NEW-FORM-INSTANCE
 - Security rules, Navigation rules, Visual attributes
- WHEN-NEW-BLOCK-INSTANCE
 - Same as WHEN-NEW-FORM-INSTANCE
 - Message rules
- WHEN-NEW-RECORD-INSTANCE
 - Default values
- WHEN-NEW-ITEM-INSTANCE
 - Message rules
 - Default values dependent on entry of another item

Standard Trigger Events

- WHEN-VALIDATE-RECORD
 - Populate hidden fields
 - Additional validations
- SPECIALn
 - Populate tools menu (SPECIAL 1-15)
 - Populate reports menu (SPECIAL 16-30)
 - Populate actions menu (SPECIAL 31-45)
- MENUUn
 - Populate tools menu (MENU1-15)
 - Use these before SPECIALn

Condition Tab

- Condition
 - Optional SQL code fragment to limit scope of rule
 - Use bind variables (:block.field)
 - Evaluates to true or false – use for complex validation

The screenshot shows the 'Condition' tab in the Oracle Forms configuration window. The 'Trigger Event' is set to 'WHEN-NEW-FORM-INSTANCE'. The 'Trigger Object' is empty. The 'Condition' field is empty and highlighted with a red box. The 'Processing Mode' dropdown is open, showing three options: 'Not in Enter-Query Mode' (selected), 'Only in Enter-Query Mode', and 'Both'. The 'Context' and 'Level' fields are also visible.

Property	Value
Trigger Event	WHEN-NEW-FORM-INSTANCE
Trigger Object	
Condition	
Processing Mode	Not in Enter-Query Mode
Context	Only in Enter-Query Mode
Level	Both

Context

- Who does this rule apply to?

Site
Responsibility
User– Use this for
testing rules
Industry (For future use)

Tip: For initial development, set context to your user id

Context Level	Value
User	SBEHN

Property Actions

- Sequence – non unique (1 – 100)
- Type – property, message, built-in, menu
- Description – (Optional)
- Language – use to change prompts for language

Condition Actions

Seq	Type	Description	Language	Enabled
1	Property		All	<input checked="" type="checkbox"/>
	Message			<input type="checkbox"/>
	Builtin			<input type="checkbox"/>
	Menu			<input type="checkbox"/>

Prompts change depending on action type

Select By Text...

Object Type: Item

Target Object:

Property Name: PROMPT_TEXT

Value:

Get Value

Insert 'Get' Expression... Insert Item Value... Validate Apply Now

Buttons

- Buttons are enabled/disabled based on type of action and object

The screenshot shows the 'Actions' tab in the Oracle APEX interface. It features a table with columns: Seq, Type, Description, Language, and Enabled. The table has two rows: Row 1 is a 'Property' action, and Row 2 is a 'Message' action. To the right of the table are fields for 'Object Type' (set to 'Item'), 'Target Object' (set to 'USER.DESSCRIPTION'), 'Property Name' (set to 'PROMPT_TEXT'), and a 'Value' field containing 'Employee Number'. Below these fields are buttons for 'Select By Text...', 'Get Value', 'Validate', and 'Apply Now'. At the bottom of the interface are buttons for 'Insert 'Get' Expression...' and 'Insert Item Value...'. Five callout boxes provide additional context: 1. 'Displays form field property using SPEL (Simplest Possible Expression Language)' points to the 'Property' action type. 2. 'Display item block.field' points to the 'Value' field. 3. 'Validate "Value" entry; If sql – will run sql statement' points to the 'Validate' button. 4. 'Attempts to execute action' points to the 'Apply Now' button. 5. 'Validate "Value" entry; If sql – will run sql statement' also points to the 'Insert Item Value...' button.

Seq	Type	Description	Language	Enabled
1	Property		All	<input checked="" type="checkbox"/>
2	Message		All	<input checked="" type="checkbox"/>
	Builtin			<input type="checkbox"/>
	Menu			<input type="checkbox"/>

Object Type: Item
Target Object: USER.DEScription
Property Name: PROMPT_TEXT
Value: Employee Number

Buttons: Select By Text..., Get Value, Validate, Apply Now, Insert 'Get' Expression..., Insert Item Value...

Callouts:

- Displays form field property using SPEL (Simplest Possible Expression Language)
- Display item block.field
- Validate "Value" entry; If sql – will run sql statement
- Attempts to execute action
- Validate "Value" entry; If sql – will run sql statement

Variables

- Variables
 - Global Variables
 - Used to pass values between forms
 - Max length is 255 bytes
 - Prepend the name of the variable with XX
 - Local variables
 - Used when you need to refer to a variable multiple times
 - Specific to local form
 - Max length is 4000 bytes
 - Prepend the name of the variable with XX

Example 1 – Change Prompt

- Payables Invoice Entry
 - Change “Trading Partner” to “Supplier Name”
- Why - Reduce time for training
 - Oracle changed many prompts to be more global
 - This prompt was changed to reflect the linking of Suppliers and Customers in TCA calling them “Trading Partners”
 - For minimal change upgrades to R12, minimize changes for users that are not necessary for your organization
 - Note: Rules are easy to turn off in the future

Example 1 – Change Prompt

- Access invoice entry form
- Query any record
 - Not required but will be beneficial when using “Validate” button to validate sql
- Access forms personalization
 - Help → Diagnostics → Custom Code → Personalize

Example 1 – Change Prompt

Form Personalizations (Invoices)

Function Name: AP_APXINWKB Form Name: APXINWKB Debug Mode: Off

Seq	Description	Level	Enabled
10	Change prompts	Form	<input checked="" type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

Condition Actions

Trigger Event: WHEN-NEW-FORM-INSTANCE (You can enter additional event na...)

Trigger Object:

Condition:

Processing Mode: Not in Enter-Query Mode

Context:

Level	Value
User	OPERATIONS
Site	

Buttons: Insert 'Get' Expression... Insert Item Value... Validate Apply Now

Annotations:

- Enter Seq and Description
- Set Level to Form
- Use WHEN-NEW-FORM-INSTANCE to Change prompts when the form opens
- Who does the rule apply to?

Example 1 – Change Prompt

- Define type of action
 - Enter sequence, action type, description, language if applicable and check enabled flag

[illegible]

Example 1 – Change Prompt

- What object type do you want to change?

Valid Object Types

- Item
- Window
- Block
- Tab Page
- Canvas
- Radio Button
- View
- Global Variable
- Parameter
- LOV
- Local Variable

Choose Object Type = Item

Select By Text...

Object Type: Item

Target Object: INV_SUM_FOLDER.VENDOR_NAME

Property Name: PROMPT_TEXT

Value: Supplier Name

Get Value

Validate Apply Now

Example 1 – Change Prompt

- Choose Target Object – what item do you want to change? In this example – INV_SUM_FOLDER.VENDOR_NAME
 - Do not need to know internal name - Use LOV or Select By Text Button

The screenshot shows the 'Select By Text' dialog box in an Oracle Forms environment. The dialog has a search field containing 'Trading Partner%' and a list of items. The 'Find' field is highlighted with a blue callout that says 'Enter prompt to search for correct item'. The list of items is as follows:

Text	Type	Object Name
Trading Partner: Name (Find Invoices)	TEXT ITEM	INVOICES_QF.VENDOR_NAME
Trading Partner (Invoice Work (Payables, ...)	TEXT ITEM	INV_SUM_FOLDER.VENDOR_NAME
Trading Partner	LOV	INV_ALL_VENDORS_NAME
Trading Partner	LOV	INV_ACTIVE_VENDORS_NAME

The 'Select By Text' button is highlighted with a blue callout that says 'Select by Text allows you to select item by prompt name'. The background shows the 'Condition' and 'Actions' tabs, with the 'Target Object' field set to 'INV_SUM_FOLDER.VENDOR_NAME'.

Example 1 – Change Prompt

- Select Property Name – what property do you want to change?

Condition Actions

Seq	Type	Description	Language	Enabled
10	Property	Trading Partner Prom	All	<input checked="" type="checkbox"/>

Select Property to change and enter Value

Object Type: Item

Target Object: INV_SUM_FOLDER.VENDOR_NAME

Property Name: PROMPT_TEXT

Value: Supplier Name

Get Value

Insert 'Get' Expression... Insert Item Value... Validate Apply Now

Example 1 – Change Prompt

- Click Apply Now

Condition

Actions

Seq	Type	Description	Language	Enabled
10	Property	Trading Partner Prom	All	<input checked="" type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

Select By Text...

Object Type

Item

Target Object

INV_SUM_FOLDER.VENDOR_NAME

Property Name

PROMPT_TEXT

Value

Supplier Name

Get Value

Insert 'Get' Expression...

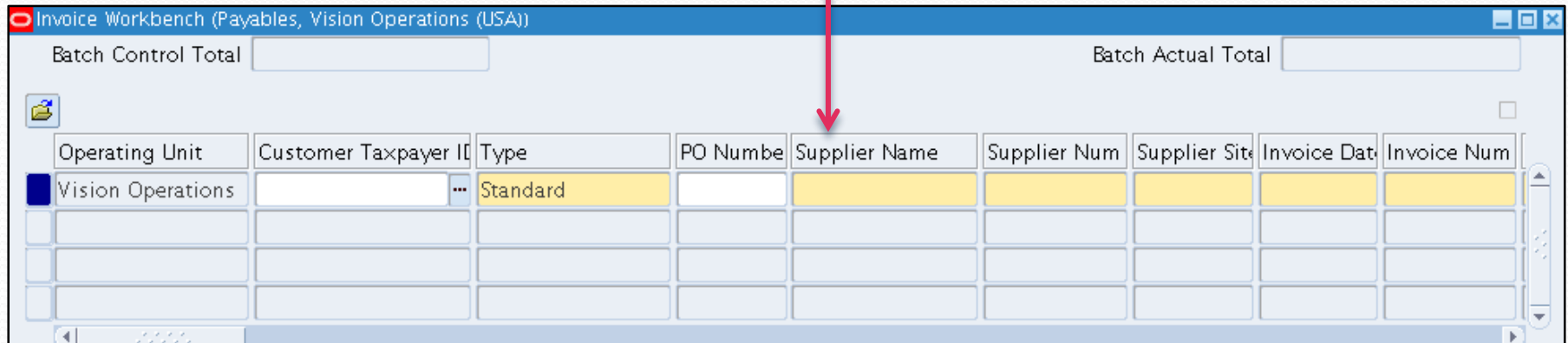
Insert Item Value...

Apply Now Button will activate rule

Apply Now

Example 1 – Change Prompt

- Rule has been applied



Invoice Workbench (Payables, Vision Operations (USA))

Batch Control Total Batch Actual Total

Operating Unit	Customer Taxpayer ID	Type	PO Number	Supplier Name	Supplier Number	Supplier Site	Invoice Date	Invoice Number
Vision Operations	<input type="text"/>	Standard	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Example 1 – Change Prompt

- Property names are different for each object type

Item

- CASE_RESTRICTION
- CONCEAL_DATA
- DISPLAYED
- ENTERABLE
- FORMAT_MASK
- HINT_TEXT
- INITIAL_VALUE
- LABEL
- NAVIGABLE
- PROMPT
- REQUIRED
- UPDATE_ALLOWED
- VALUE
- X_POS
- Y_POS

Radio Button

- ENABLED
- LABEL
- PROMPT
- VISIBLE
- WIDTH
- X_POS
- Y_POS

Example 1 – Change Prompt

- Property names are different for each object type

BLOCK

- DEFAULT_WHERE
- DELETE_ALLOWED
- INSERT_ALLOWED
- NEXT_NAVIGATION_BLOCK
- ORDER_BY
- PREVIOUS_NAVIGATION_BLOCK
- QUERY_ALLOWED
- UPDATE_ALLOWED

LOV

- AUTO_REFRESH
- GROUP_NAME
- HEIGHT
- TITLE
- WIDTH
- X_POS
- Y_POS

GLOBAL VARIABLE

- INITIAL_VALUE
- VALUE

Example 2 – Display Message

- Payables Invoice Entry – Display a reminder message that the requester should be entered if there is no PO Number
 - Making the field required is not an ideal option because it's only required if there is no PO
- Notice the field after Requester is Supplier Name
 - Be cautious of folder tools impacting rules

Invoice Workbench (Payables, Vision Operations (USA))

Batch Control Total Batch Actual Total

Operating Unit	Customer Taxpayer ID	Type	PO Number	Requester	Supplier Name	Supplier Num	Supplier Site	Invo
Vision Operations	<input type="text"/>	Standard	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

1 General 2 Lines 3 Holds 4 View Payments 5 Scheduled Payments 6 View Prepayment Applications

Example 2 – Display Message

- Use WHEN-NEW-ITEM-INSTANCE with the Supplier Name Object to trigger the event when the user enters that field

The screenshot shows the 'Form Personalizations (Invoices)' window. At the top, the 'Function Name' is 'AP_APXINWKB', 'Form Name' is 'APXINWKB', and 'Debug Mode' is 'Off'. Below this is a table with columns 'Seq', 'Description', 'Level', and 'Enabled'. The table contains two rows: row 10 'Change Prompts' and row 20 'Require requestor if no PO'. Row 20 is highlighted in yellow. Below the table are tabs for 'Condition' and 'Actions'. The 'Condition' tab is active, showing the following configuration:

Trigger Event	WHEN-NEW-ITEM-INSTANCE
Trigger Object	INV_SUM_FOLDER.VENDOR_NAME
Condition	:inv_sum_folder.quick_po_number is null
Processing Mode	Not in Enter-Query Mode

Two callout boxes provide additional context:

- A blue callout box points to the 'Trigger Object' field, stating: 'Condition is checked when the user accesses the supplier name field'.
- A blue callout box points to the 'Condition' field, stating: 'Rule is executed if PO number is null'.

Example 2 – Display Message

The screenshot shows the 'Actions' tab in a configuration window. A table lists actions with columns: Seq, Type, Description, Language, and Enabled. The first row is highlighted with Seq '10', Type 'Message', Description 'Requester reminder', Language 'All', and Enabled checked. A blue callout box points to the 'Message' type with the text 'Action type = message'. To the right, the 'Message Type' is set to 'Show' and the 'Message Text' is a reminder to enter the requester when there is no PO Number.

Seq	Type	Description	Language	Enabled
10	Message	Requester reminder	All	<input checked="" type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

Message Type: Show

Message Text: Remember to enter the requester when there is not a PO Number. This is the starting point for the approval cycle.

- Message Types
 - Show – Informational Message
 - Hint – Appear on status bar
 - Error – Requires user response – raises form_trigger_failure
 - Debug – Only displays if debug mode is set to Show Debug Messages
 - Warn – Informational message with caution symbol – raises form_trigger_failure

Example 2 – Display Message

- Result

The screenshot displays the Oracle Invoice Workbench interface for Payables, Vision Operations (USA). At the top, there are fields for 'Batch Control Total' and 'Batch Actual Total'. Below these is a table with columns: Operating Unit, Customer Taxpayer ID, Type, PO Number, Supplier Name, Supplier Number, Supplier Site, Invoice Date, Invoice Number, and Invoice Currency. The first row is highlighted in yellow and contains the values: Vision Operations, (blank), Standard, (blank), (blank), (blank), (blank), (blank), (blank), and USD. Below the table are tabs for '1 General', '2 Lines', and '3 History'. A modal message box titled 'Note' is overlaid on the table, containing a clipboard icon and the text: 'Remember to enter the requester when there is not a PO Number. This is the starting point for the approval cycle.' with an 'OK' button. At the bottom, there is a 'Summary' section with 'Items' (blank), 'USD 0.00', and a 'Status' field set to 'Never Validated'.

Operating Unit	Customer Taxpayer ID	Type	PO Number	Supplier Name	Supplier Number	Supplier Site	Invoice Date	Invoice Number	Invoice Currency
Vision Operations		Standard							USD

1 General 2 Lines 3 History

Summary

Items USD 0.00 Status Never Validated

Note: Remember to enter the requester when there is not a PO Number. This is the starting point for the approval cycle.

Example #3 – Menus, Builtin

- Create a menu item
- Use a builtin to call a function
- This function will call the “View Suppliers” form

If the function is restricted based on function security or Role Based Access Control, the standard error message will display notifying the user that this function is not available to this responsibility

Example #3 – Menus, Builtin

- Trigger event on condition tab is WHEN-NEW-FORM-INSTANCE
- The “Menu” action type creates menu items

30 Establish Menu Function ☒

40 Actions for Menu1 – View Supplier Details Form ☒

Condition Actions

Seq	Type	Description	Language	Enabled
10	Menu	View Supplier Details	All	<input checked="" type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

Action type = menu

Menu Entry: MENU1: View Supplier Details

Menu Label: View Supplier Details

☐ Render line before menu

Icon Name:

Enabled in Block(s):

Add Block...

Enter a label

Example #3 – Menus, Builtin

- Create a separate rule (40) to define actions for the menu established in the previous rule
- Trigger event on condition tab is MENU1

The screenshot shows the 'Form Personalizations (Invoices)' window. At the top, there are fields for 'Function Name' (AP_APXINWKB), 'Form Name' (APXINWKB), and 'Debug Mode' (Off). Below these is a table of rules:

Seq	Description	Level	Enabled
10	Change Prompts	Form	<input checked="" type="checkbox"/>
20	Require requestor if no	Form	<input checked="" type="checkbox"/>
30	Establish Menus	Function	<input checked="" type="checkbox"/>
40	Actions for Menu1 – View Supplier Details	Form	<input checked="" type="checkbox"/>

A blue callout box with the text 'This was the previous rule' points to rule 30. A red arrow points from rule 40 to the 'Trigger Event' dropdown in the 'Condition' tab, which is set to 'MENU1'. The 'Condition' tab is active, showing fields for 'Trigger Event', 'Trigger Object', and 'Condition'. The 'Processing Mode' is set to 'Not in Enter-Query Mode'.

Example #3 – Menus, Builtin

- Function Name has a LOV to search by name
 - Do not need to know “Function Code”
 - Use “Add Parameter” button to pass parameters for professional form functions
- Use syntax below to pass parameters to an OAF form

40 Actions for Menu1 – View Supplier Details Form

Condition Actions

Seq	Type	Description	Language	Enabled
10	Builtin	Call address book	All	<input checked="" type="checkbox"/>

Action type = Builtin

Builtin Type: Launch a Function

Function Code: POS_HT_SP_B_SUPP

Function Name: Supplier: Buyer View: Supplier Search Page

Parameters: =select 'OAHP=POS_HT_SP_HP&OASF=POS_HT_SP_B_SUPP&OAPB=AP_PAY_PRODUCT_BRAND'||&supplier_id=||\${item.inv_sum_folder.vendor_id.value} from dual

Add Parameter...

Editor

=select
'OAHP=POS_HT_SP_HP&OASF=POS_HT_SP_B_SUPP&OAPB=AP_PAY_PRODUCT_BRAND'||&supplier_id=||\${item.inv_sum_folder.vendor_id.value} from dual

OK Cancel Search

Example #3 – Menus, Builtin

- More details...
 - Calling OAF forms requires research
 - Query the function name in the System Administrator responsibility
 - Get the text from the first character after the & which follows the controller name to the end
 - This is the first part of the syntax for the select statement in the parameter
 - May need to download the controller from \$JAVA_TOP and view in notepad to determine parameter names
 - Use “About this Page” to find controller name

Example #3 – Menus, Builtin

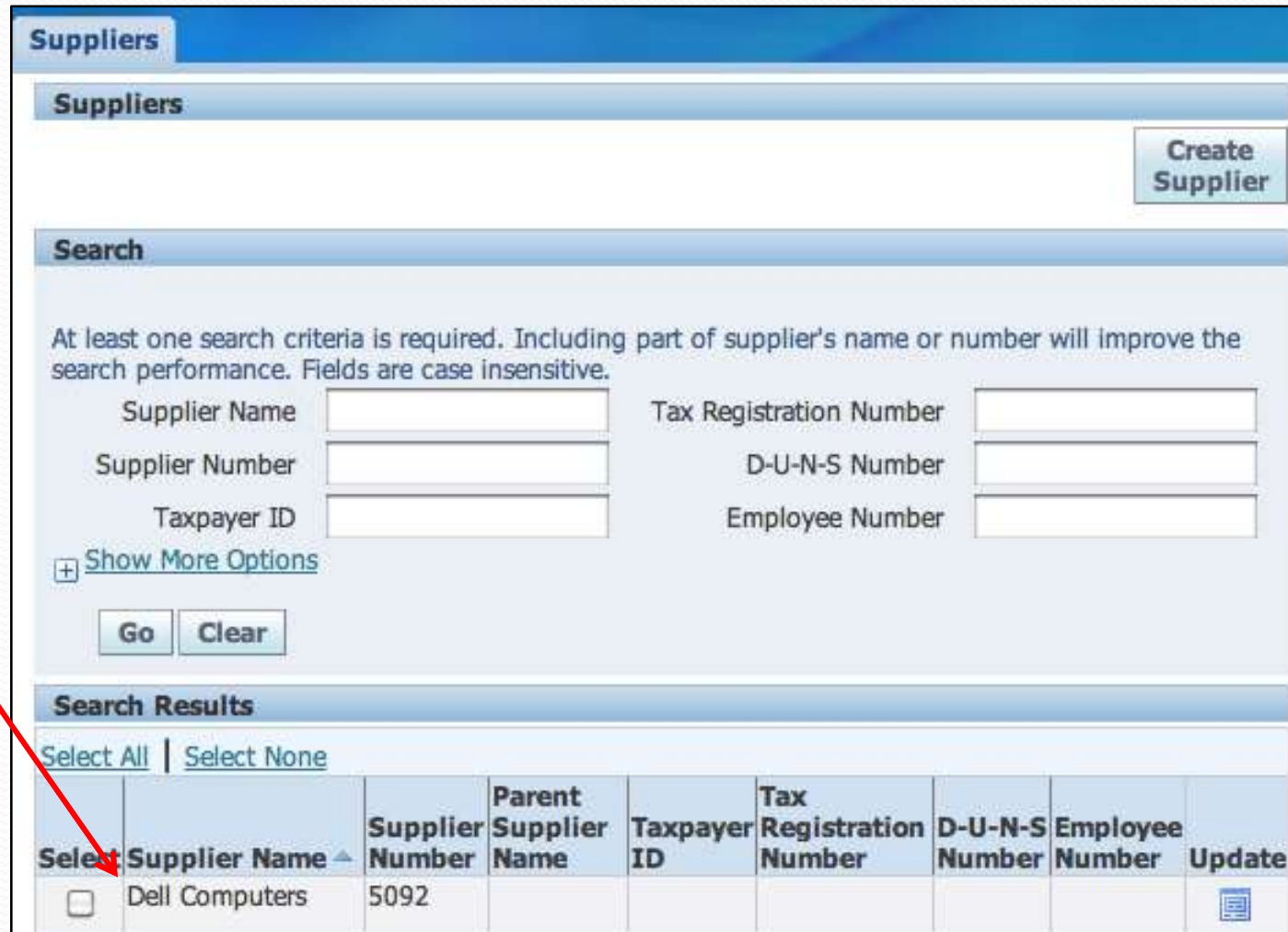
- New menu item is on tools menu

The screenshot displays the Oracle Invoice Workbench application window. The menu bar includes File, Edit, View, Folder, Tools, Reports, Window, and Help. The Tools menu is open, showing options: View Invoice Overview, View Accounting Events, IL Tax Details, and View Supplier Details. A red arrow points to the View Supplier Details option. The main window title is 'Invoice Workbench (P...s (USA))'. Below the menu, there is a 'Batch Control Totals' section and a 'Batch Actual Total' field. A table with columns: Operating Unit, Customer Taxpayer ID, Type, PO Number, Supplier Name, Supplier Number, Supplier Site, Invoice Date, Invoice Number, and Invoice Currency is shown. The first row is highlighted with a blue background and contains the following data: Vision Operations, [blank], Standard, [blank], Dell Comp, 5092, DELL, [blank], [blank], and USD. Below the table, there are tabs for 1 General, 2 Lines, 3 Holds, 4 View Payments, 5 Scheduled Payments, and 6 View Prepayment Applications. At the bottom, there are fields for Summary, Amount Paid, and Status.

Operating Unit	Customer Taxpayer ID	Type	PO Number	Supplier Name	Supplier Number	Supplier Site	Invoice Date	Invoice Number	Invoice Currency
Vision Operations		Standard		Dell Comp	5092	DELL			USD

Example #3 – Menus, Builtin

- Result
 - Supplier has already been retrieved



Suppliers

Suppliers

Create Supplier

Search

At least one search criteria is required. Including part of supplier's name or number will improve the search performance. Fields are case insensitive.

Supplier Name Tax Registration Number


Supplier Number D-U-N-S Number

Taxpayer ID Employee Number

☐ [Show More Options](#)

Search Results

[Select All](#) | [Select None](#)

Select	Supplier Name	Supplier Number	Parent Supplier Name	Taxpayer ID	Tax Registration Number	D-U-N-S Number	Employee Number	Update
<input type="checkbox"/>	Dell Computers	5092						

Example #4 – Call a Function

- Execute a procedure to call a function which executes a workflow
- In this example, a workflow sends a notification to the supplier requesting the PO number if there is not one provided on the invoice

Example #4 – Call a Function

- Create another menu item as shown previously to execute the function
- Pass the invoice id to the workflow
 - The workflow will send the request to the contact person for the site

42 Actions for Menu 2 – Request PO from Supplier

Condition Actions

Seq	Type	Description	Language	Enabled
10	Builtin		All	<input checked="" type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

Builtin Type Execute a Procedure

Argument

```
=BEGIN xxmyinc_pers_wf(''||item.  
inv_sum_folder.invoice_id.value)||'); END'
```

Follow the syntax exactly. All the single quotes are a little tricky.

Example #4 – Call a Function

```
CREATE OR REPLACE PROCEDURE xxmyinc_pers_wf (p_user_name IN VARCHAR2) AS
l_item_key VARCHAR2(30);
BEGIN /* Main Program */
l_item_key := to_char(sysdate,'MMDDRRRR')||'-'||to_char(sysdate,'HH24MISS');
--Create Workflow Process
WF_ENGINE.CreateProcess (itemtype => 'XXPERSWF'
                        ,itemkey => l_item_key
                        ,process => 'MAIN_PROCESS'
                        ,user_key => p_user_name
                        ,owner_role => p_user_name);
-- Set attribute Value of User Name
WF_ENGINE.setitemattrtext (itemtype => 'XXPERSWF'
                        ,itemkey => l_item_key
                        ,aname => 'USER_NAME'
                        ,avalue => p_user_name);
-- Start Workflow Process
WF_ENGINE.StartProcess (itemtype => 'XXPERSWF'
                        ,itemkey => l_item_key);

COMMIT;
END xxmyinc_pers_wf;
```

Example #5 – GO_ITEM

- Cash management → Manual Clearing
 - Default “Date Cleared” to system date and prevent manual update
- Two parts to rule
 - Set the default value
 - Prevent update to the value
- Challenge: if you set a field to non-updateable, you cannot set a default value

Example #5 – GO_ITEM

- Trigger event = WHEN-NEW-ITEM-INSTANCE for Date Cleared field
 - Default value will be set when user tabs to field

Form Personalizations (Clear Transactions)

Function Name: CEXCLEAR Form Name: CEXCABMR Debug Mode: Off

Seq	Description	Level	Enabled
10	Default cleared date to current date and prevent update	Form	<input checked="" type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

Condition Actions

Trigger Event: WHEN-NEW-ITEM-INSTANCE (You can enter additional event names.)

Trigger Object: AVAILABLE.CLEARED_DATE_DSP

Condition: [Empty text area]

Processing Mode: Not in Enter-Query Mode

Example #5 – GO_ITEM

- Use property action to set default value
- Use validate button to validate sql

Condition Actions

Seq	Type	Description	Language	Enabled
10	Property	Default to sysdate	All	<input checked="" type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

Select By Text...

Object Type: Item

Target Object: AVAILABLE.CLEARED_DATE_DSP

Property Name: VALUE

Value: =select to_char(sysdate, 'DD-MON-RRRR') from dual

Get Value

Insert 'Get' Expression... Insert Item Value... Validate Apply Now

Note: 06-JUN-2011 OK

Example #5 – GO_ITEM

- Use the Builtin property “GO_ITEM” to go to the next field
 - The trigger event and item are the same
 - Make sure setting the default sequence number is before GO_ITEM sequence number
 - Every time the user tries to click on the field, this rule will execute setting the default date and immediately moving to the next item

Seq	Type	Description	Language	Enabled
10	Property	Default to sysdate	All	<input checked="" type="checkbox"/>
11	Builtin	Lock Cleared Date	All	<input checked="" type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

Builtin Type	GO_ITEM
Argument	AVAILABLE.VALUE_DATE_DSP

Example #5 – GO_ITEM

- Result – Cleared date is always defaulted to current date

Clear Transactions - 909082288-03

Account Name: Payroll A/C
Account Number: 909082288-03
Currency Code: USD

Bank Name: Citibank
Branch Name: West Side Branch

Transaction | Exchange | Reference | Organization

Type	Number	Currency	Amount	Account Currency	Amount	Amount Cleared	Cleared Date	Value Date	GL Date	Date
<input type="checkbox"/> Payment	101	USD	11,685.25	11,685.25			06-JUN-2011			21-FEB-2003

Other Builtins

- Launch SRS Form – runs concurrent request
- Launch a URL – call any web page
- DO_KEY
 - DO_KEY('NEXT_BLOCK') will force query execution for find window
- GO_ITEM, GO_BLOCK – change navigation
- EXECUTE_TRIGGER
 - Execute form trigger, not database trigger
 - Use after setting default values to ensure internal code executes
 - This is often required when setting default values for radio buttons
- Create Record Group from Query
 - Use this to change LOVs

Other Builtins

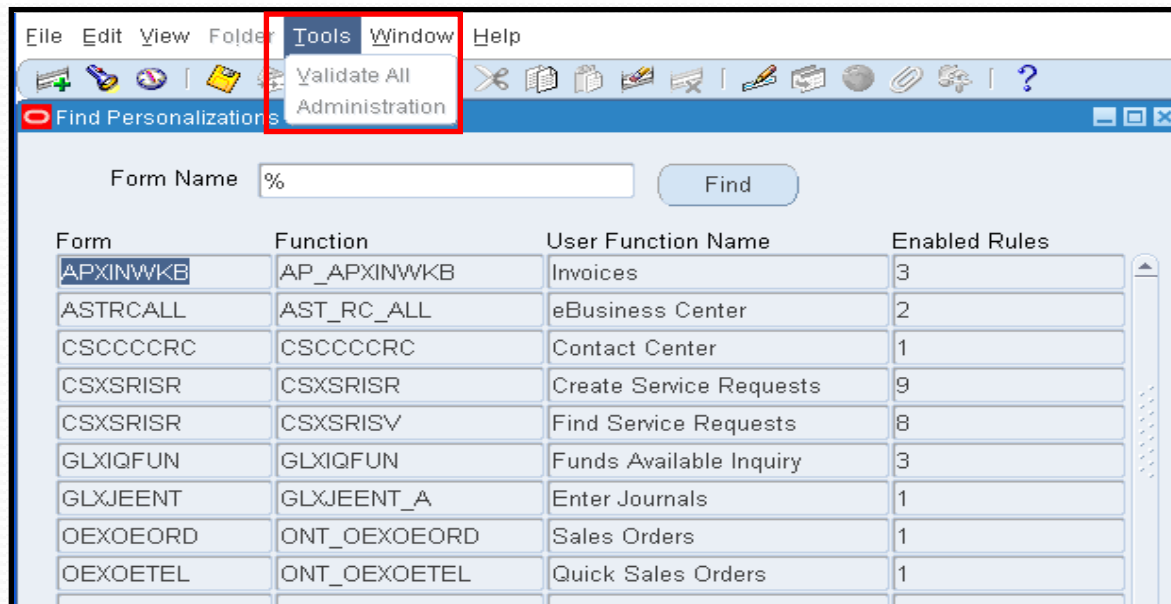
- FORMS_DDL - ****Beware of security threat**
- RAISE FORM_TRIGGER_FAILURE
 - User must correct error before form will save
- SYNCHRONIZE
 - Used for rare circumstances when the screen is not synchronized between the client and middle tiers
- Call Custom Library
 - Call custom library passing event name
- Set Profile Value in Cache

Forms Personalization – Tips

- Exit and re-open the form to see personalization changes
- Use debug messages before and after events
- Apply Now button - see the results
 - Does not always work if dependent on the results of another action
- Turn custom code off - Help → Diagnostics → Custom Code → Off

Maintenance

- After upgrades, go to the personalization for each form and choose Tools → Validate All
- Tools → Administration will show personalized forms
 - Press the Find button with the Form Name blank



Form Name

Form	Function	User Function Name	Enabled Rules
APXINWKB	AP_APXINWKB	Invoices	3
ASTRCALL	AST_RC_ALL	eBusiness Center	2
CSCCCRC	CSCCCRC	Contact Center	1
CSXSRISR	CSXSRISR	Create Service Requests	9
CSXSRISR	CSXSRISV	Find Service Requests	8
GLXIQFUN	GLXIQFUN	Funds Available Inquiry	3
GLXJEENT	GLXJEENT_A	Enter Journals	1
OEXOEORD	ONT_OEXOEORD	Sales Orders	1
OEXOETEL	ONT_OEXOETEL	Quick Sales Orders	1

Tables

- FND_FORM_CUSTOM_RULES
 - Data from header and condition
- FND_FORM_CUSTOM_SCOPES
 - Data from context area
- FND_FORM_CUSTOM_ACTIONS
 - Data from actions tab
- Create your own custom reports to document personalizations

OA Framework Personalizations

Setup and Use
Examples 6 - 10

Setup – OAF Profile Options

- Personalize Self-Service Defn
 - Yes to allow 'Personalize' button to appear at the top of the page
- FND: Personalization Region Link Enabled
 - Yes to display all the regional links above each region
 - Minimal to display key regional links
- Disable Self-Service Personal
 - Yes will disable all personalizations at any level
- FND: Diagnostics
 - Turns on 'About this Page'
- FND: Personalization Document Root Path (new in 11.5.10)
 - Required to migrate personalizations
 - Set this profile option to a tmp directory with open (777) permissions

Setup – OAF Profile Options

ORACLE® iProcurement

Shopping Cart Close Window Preferences Help Personalize Page Diagnostics

Shop Requisitions Receiving Contractors

Requisitions Notifications Approvals

Requisitions

Personalize "Views"

Views

Personalize Default Single Column

Personalize Table Layout: (ViewsTableLayout)

View All My Requisitions Go

Personalize Table Layout: (TipTableLayout)

Indicates requisition with a pending change request.

Personalize "This table displays a listing of ..."

Select requisition: Copy To Cart Cancel Requisition Change Complete

Select Requisition	Description	Total (USD)	Creation Date	Status	Order
<input type="radio"/> 1438	New Computer	3,000.00	04-Nov-2007 14:48:00	Incomplete	
<input type="radio"/> 1433	Mobile phone - expensable asset (tracked in ASSET)	113,680.00	02-Nov-2007 10:45:06	Incomplete	
<input type="radio"/> 1432	New Car	22,000.00	02-Nov-2007 10:40:26	Incomplete	
<input type="radio"/> 1431	New Car	3,000.00	01-Nov-2007 21:40:37	Incomplete	

About this Page Privacy Statement

Shop Requisitions Receiving Contractors Shopping Cart Close Window Preferences Help Personalize Page Diagnostics

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FND: Personalization Region Link Enabled = Yes

Personalize Self-Service Defn = Yes

FND: Diagnostics = Yes

Finding Object to Personalize

- Biggest challenge
- Search
- Simple View
- Complete View
- **Expand All**
- <ctrl> F
- Collapse All
- Focus

Suppliers

Personalize Page: /oracle/apps/pos/supplier/webui/QuickUpdatePG.pageLayoutRN

[Choose Context](#) [Manage Levels](#)

Personalization Context

Scope: Page: /oracle/apps/pos/supplier/webui/QuickUpdatePG.pageLayoutRN
Document Name: /oracle/apps/pos/supplier/webui/QuickUpdatePG
Function: Supplier: Buyer View: Quick Update Page
Site: Include
Organization: Vision Operations
Responsibility: Payables, Vision Operations (USA)

Search

Personalization Structure













☐ Simple View ☒ Complete View

[Expand All](#) | [Collapse All](#)

Focus Name	Shown	User Personalizable	Personalize	Reorder	Create Item	Update Item	Delete Item	Seeded User Views
Page Layout: (pageLayoutRN)	Yes							
Message Component Layout: (OrgDetailsRN)	Yes							
Message Text Input: Supplier Name	Yes							
Message Styled Text: Supplier Number	Yes							
Message Text Input: Alternate Supplier Name	Yes							
Message Styled Text: Registry ID	Yes							
Message Text Input: Inactive Date	Yes							

Finding Object to Personalize

- My favorite – expand all and use <ctrl> F

Message Styled Text: End Date	Yes			
Message St	Yes			
Message St	Yes			
Tip: (WFWork	Yes			
Tip: (WFWork	Yes			
 Page Button B	Yes			
Button: Create Expense Report	Yes			
Button: Import Spreadsheet	Yes			
Button: Export Spreadsheet	Yes			

Click pencil to edit

Personalization Levels/Inheritance

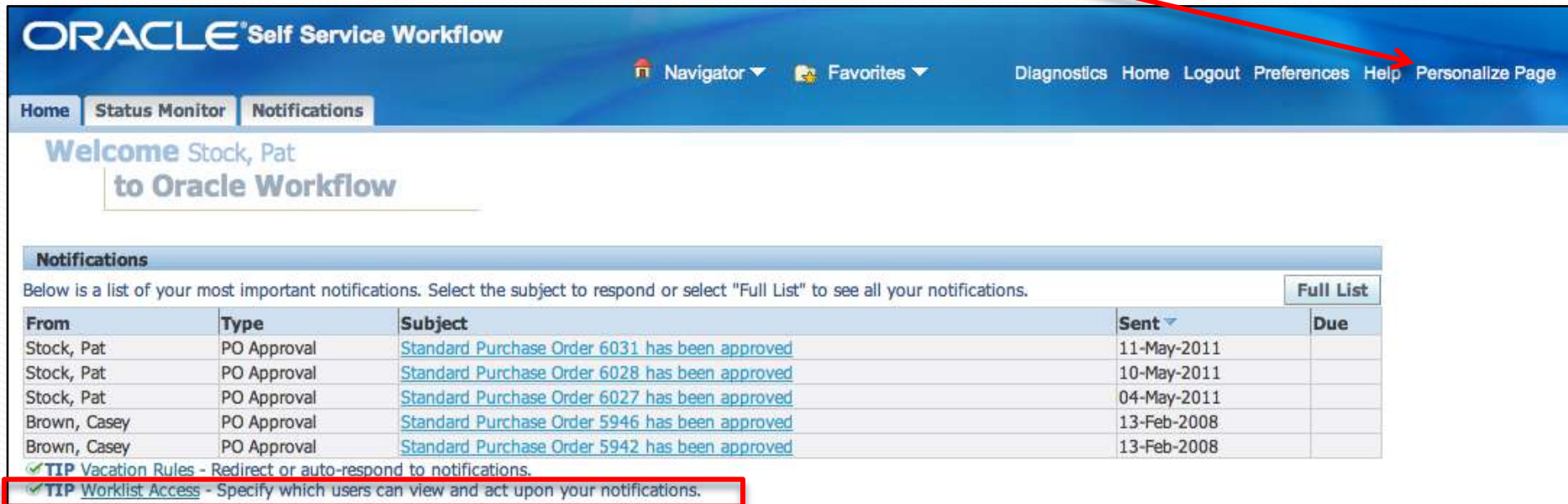
- Personalizations at lower levels override personalizations at higher levels
- Values inherit the definition from the level immediately above unless changed
- Order of precedence from highest to lowest:
 - Function
 - Site
 - Operating Unit
 - Responsibility

OA Framework Examples

- Remove “Worklist Access” link
- Modify privacy statement
- Create an export button
- Submit a concurrent request
- Modify the query for a table

Example 6 – Remove link

- Remove “Worklist Access” link from “Workflow User, Vision Enterprises” responsibility
- Click “Personalize Page”



ORACLE® Self Service Workflow

Navigator Favorites Diagnostics Home Logout Preferences Help **Personalize Page**

Home Status Monitor Notifications

Welcome Stock, Pat
to Oracle Workflow

Notifications

Below is a list of your most important notifications. Select the subject to respond or select "Full List" to see all your notifications.

From	Type	Subject	Sent	Due
Stock, Pat	PO Approval	Standard Purchase Order 6031 has been approved	11-May-2011	
Stock, Pat	PO Approval	Standard Purchase Order 6028 has been approved	10-May-2011	
Stock, Pat	PO Approval	Standard Purchase Order 6027 has been approved	04-May-2011	
Brown, Casey	PO Approval	Standard Purchase Order 5946 has been approved	13-Feb-2008	
Brown, Casey	PO Approval	Standard Purchase Order 5942 has been approved	13-Feb-2008	

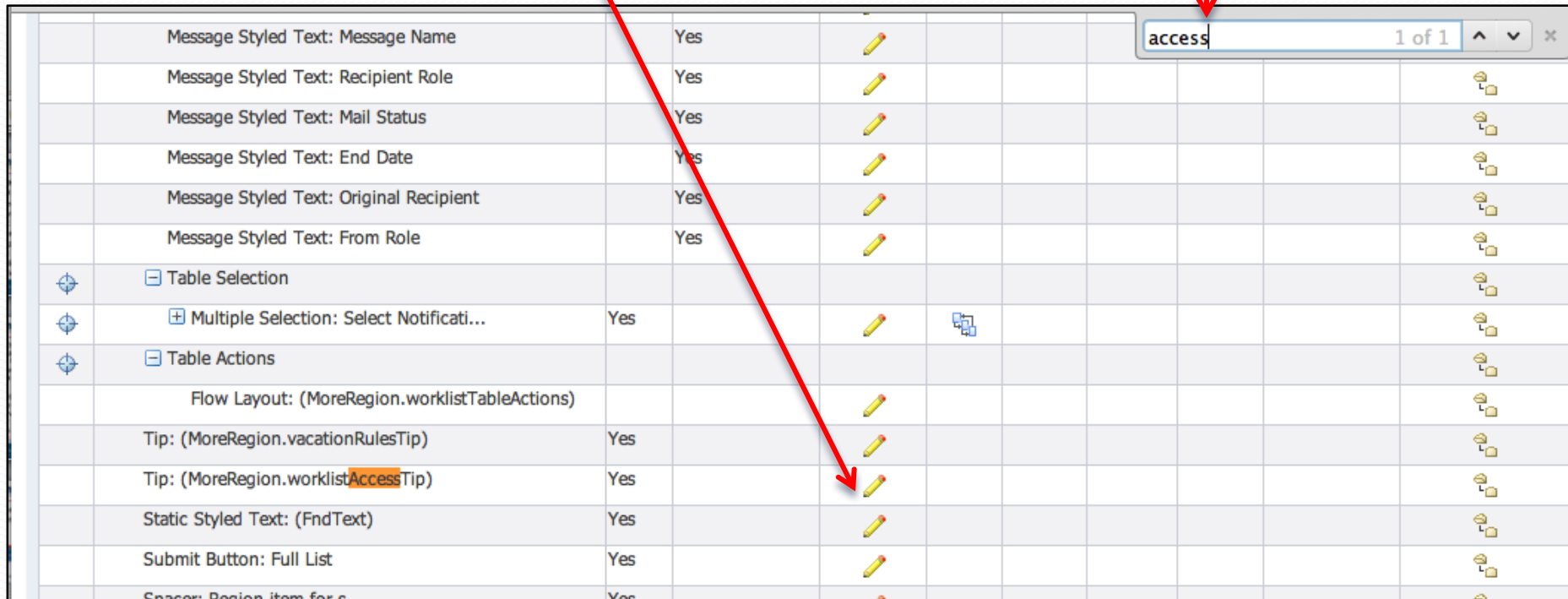
Full List

✓ **TIP** Vacation Rules - Redirect or auto-respond to notifications.

✓ **TIP** Worklist Access - Specify which users can view and act upon your notifications.

Example 6 – Remove link

- Use <ctrl> F to search for “Access”
- Click the pencil



The screenshot shows a table with various configuration items. A search bar at the top right contains the text "access" and shows "1 of 1" results. A red arrow points from the search bar to the search input field. Another red arrow points from the top left towards the row containing "Tip: (MoreRegion.worklistAccessTip)", specifically pointing to the pencil icon in the fifth column. The table has columns for description, a "Yes" column, and a column with pencil icons. The row "Tip: (MoreRegion.worklistAccessTip)" is highlighted with an orange background.

Message Styled Text: Message Name	Yes			
Message Styled Text: Recipient Role	Yes			
Message Styled Text: Mail Status	Yes			
Message Styled Text: End Date	Yes			
Message Styled Text: Original Recipient	Yes			
Message Styled Text: From Role	Yes			
Table Selection				
Multiple Selection: Select Notificati...	Yes			
Table Actions				
Flow Layout: (MoreRegion.worklistTableActions)				
Tip: (MoreRegion.vacationRulesTip)	Yes			
Tip: (MoreRegion.worklistAccessTip)	Yes			
Static Styled Text: (FndText)	Yes			
Submit Button: Full List	Yes			
Spacer: Region item for c	Yes			

Example 6 – Remove link

- Set Rendered to “false” at the responsibility level

Personalize Tip : (MoreRegion.worklistAccessTip)

Cancel Apply

Personalization Context

Scope: Page: Oracle Workflow
Document Name: /oracle/apps/fnd/wf/uihome/webui/HomePG
Function: Workflow Self-Service Home
Site: Include
Organization: Vision Operations
Responsibility: Workflow User, Vision Enterprises

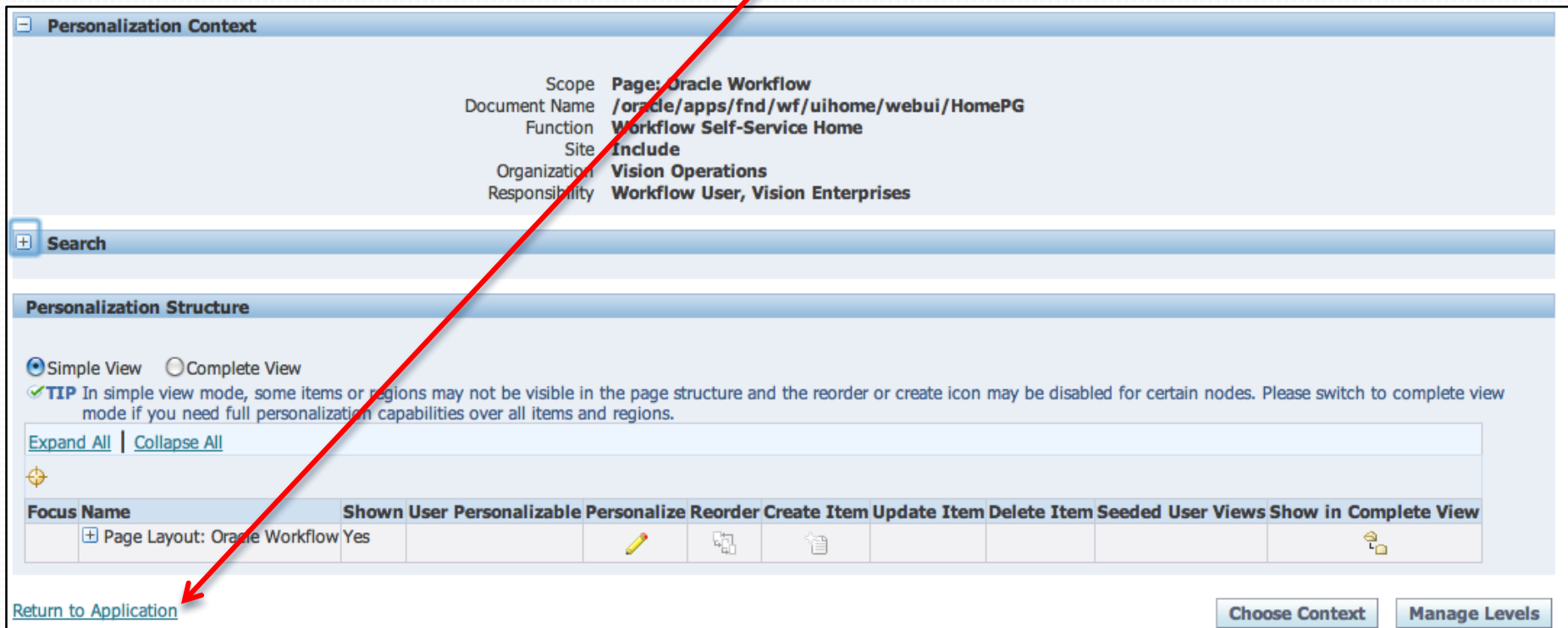
Personalization Properties

Clear Personalization Go Choose Levels Displayed

	Original Definition	Function: Workflow Self-Service Home	Site	Organization: Vision Operations	Responsibility: Workflow User, Vision Enterprises	Result / Source
Admin Personalization	true	Inherit	Inherit	Inherit	Inherit	true / Original Definition
CSS Class	Default	Inherit	Inherit	Inherit	Inherit	Default / Original Definition
Rendered	true	Inherit	Inherit	Inherit	false	false / Responsibility
Text	Default	Inherit	Inherit	Inherit	Inherit	Default / Original Definition
Tip Message Name	Default	Inherit	Inherit	Inherit	Inherit	Default / Original Definition

Example 6 – Remove link

- Click “Return to Application”



Personalization Context

Scope: **Page: Oracle Workflow**
Document Name: **/oracle/apps/fnd/wf/uihome/webui/HomePG**
Function: **Workflow Self-Service Home**
Site: **Include**
Organization: **Vision Operations**
Responsibility: **Workflow User, Vision Enterprises**

Search

Personalization Structure

☒ Simple View ☐ Complete View

TIP In simple view mode, some items or regions may not be visible in the page structure and the reorder or create icon may be disabled for certain nodes. Please switch to complete view mode if you need full personalization capabilities over all items and regions.

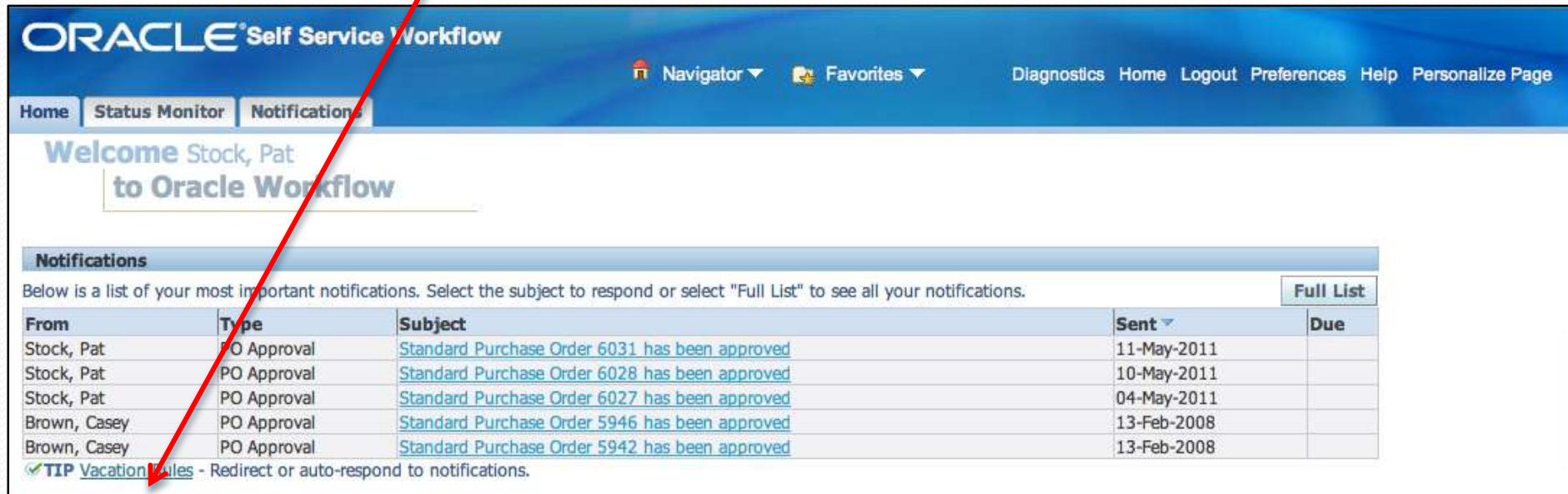
[Expand All](#) | [Collapse All](#)

Focus Name	Shown	User Personalizable	Personalize	Reorder	Create Item	Update Item	Delete Item	Seeded	User Views	Show in Complete View
Page Layout: Oracle Workflow Yes										

[Return to Application](#) [Choose Context](#) [Manage Levels](#)

Example 6 – Remove link

- Link is removed



ORACLE Self Service Workflow

Navigator Favorites Diagnostics Home Logout Preferences Help Personalize Page

Home Status Monitor Notification

Welcome Stock, Pat
to Oracle Workflow

Notifications

Below is a list of your most important notifications. Select the subject to respond or select "Full List" to see all your notifications.

From	Type	Subject	Sent	Due
Stock, Pat	PO Approval	Standard Purchase Order 6031 has been approved	11-May-2011	
Stock, Pat	PO Approval	Standard Purchase Order 6028 has been approved	10-May-2011	
Stock, Pat	PO Approval	Standard Purchase Order 6027 has been approved	04-May-2011	
Brown, Casey	PO Approval	Standard Purchase Order 5946 has been approved	13-Feb-2008	
Brown, Casey	PO Approval	Standard Purchase Order 5942 has been approved	13-Feb-2008	

✓ **TIP** [Vacation Rules](#) - Redirect or auto-respond to notifications.

Example 7 – Privacy Statement

- Update the link for the privacy statement to a web link containing the privacy statement for your organization
 - By default, this link is undefined - will generate an error if clicked

The screenshot shows the Oracle Payables Suppliers page. A red arrow points from the top of the page down to the 'Privacy Statement' link in the footer. The page includes a 'Suppliers' tab, a 'Create Supplier' button, a search section with various input fields, and a 'To Do List' on the right. The footer contains links for 'About this Page' and 'Privacy Statement', along with copyright information.

ORACLE Payables

Navigator Favorites Home Logout Preferences Help Personalize Page Diagnostics

Suppliers

Suppliers **Create Supplier**

Search

At least one search criteria is required. Including part of supplier's name or number will improve the search performance. Fields are case insensitive.

Supplier Name Tax Registration Number

Supplier Number D-U-N-S Number

Taxpayer ID Employee Number

[Show More Options](#)

Go **Clear**

Search Results

Supplier Select Name	Supplier Number	Parent Supplier Name	Taxpayer ID	Tax Registration Number	D-U-N-S Number	Employee Number	Update
No search conducted.							

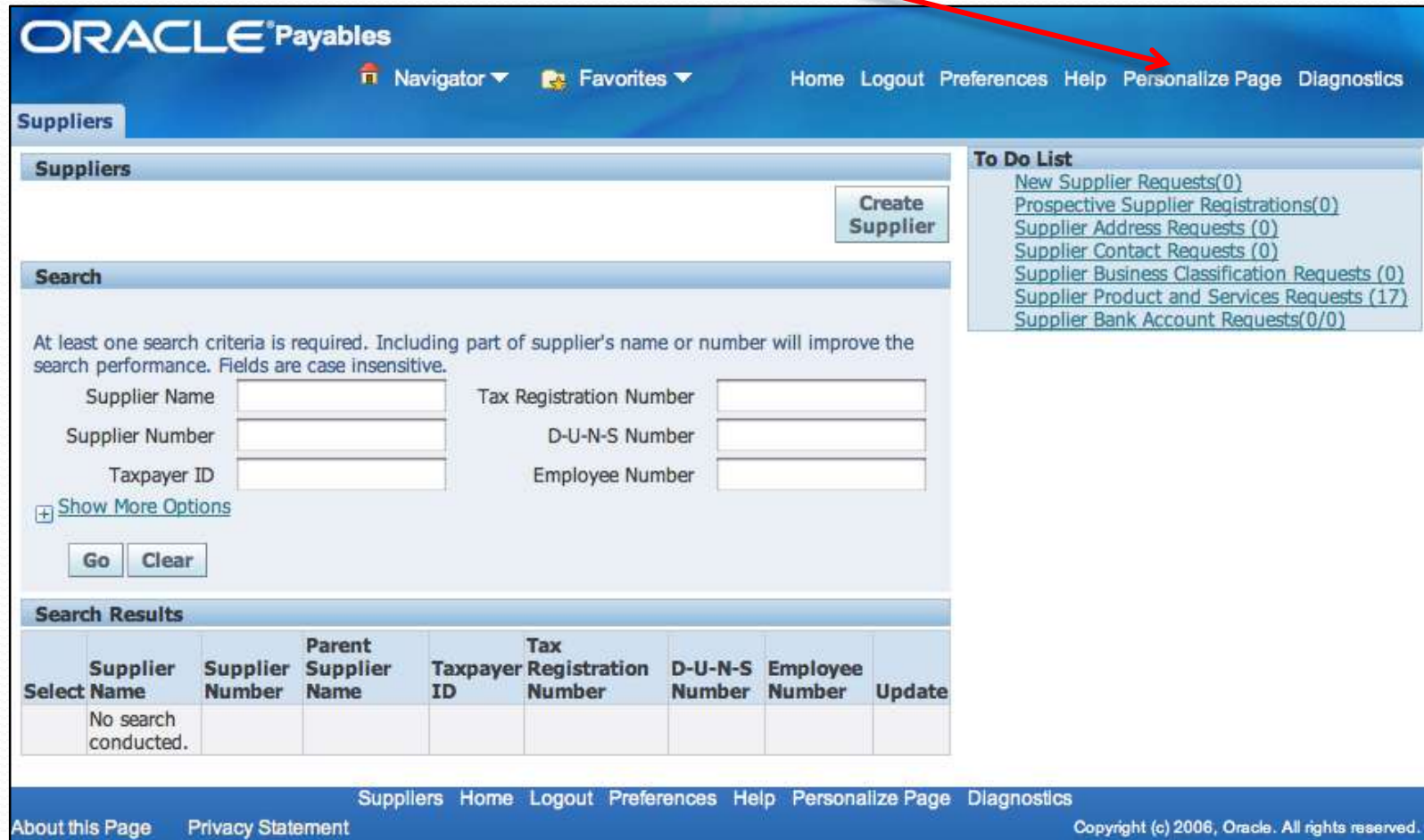
To Do List

- [New Supplier Requests\(0\)](#)
- [Prospective Supplier Registrations\(0\)](#)
- [Supplier Address Requests \(0\)](#)
- [Supplier Contact Requests \(0\)](#)
- [Supplier Business Classification Requests \(0\)](#)
- [Supplier Product and Services Requests \(17\)](#)
- [Supplier Bank Account Requests\(0/0\)](#)

About this Page **Privacy Statement** Suppliers Home Logout Preferences Help Personalize Page Diagnostics

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Example 7 – Privacy Statement



ORACLE[®] Payables

Navigator ▼ Favorites ▼ Home Logout Preferences Help **Personalize Page** Diagnostics

Suppliers

Suppliers [Create Supplier](#)

Search

At least one search criteria is required. Including part of supplier's name or number will improve the search performance. Fields are case insensitive.

Supplier Name Tax Registration Number

Supplier Number D-U-N-S Number

Taxpayer ID Employee Number

☐ [Show More Options](#)

Search Results

Select	Supplier Name	Supplier Number	Parent Supplier Name	Taxpayer ID	Tax Registration Number	D-U-N-S Number	Employee Number	Update
	No search conducted.							

To Do List

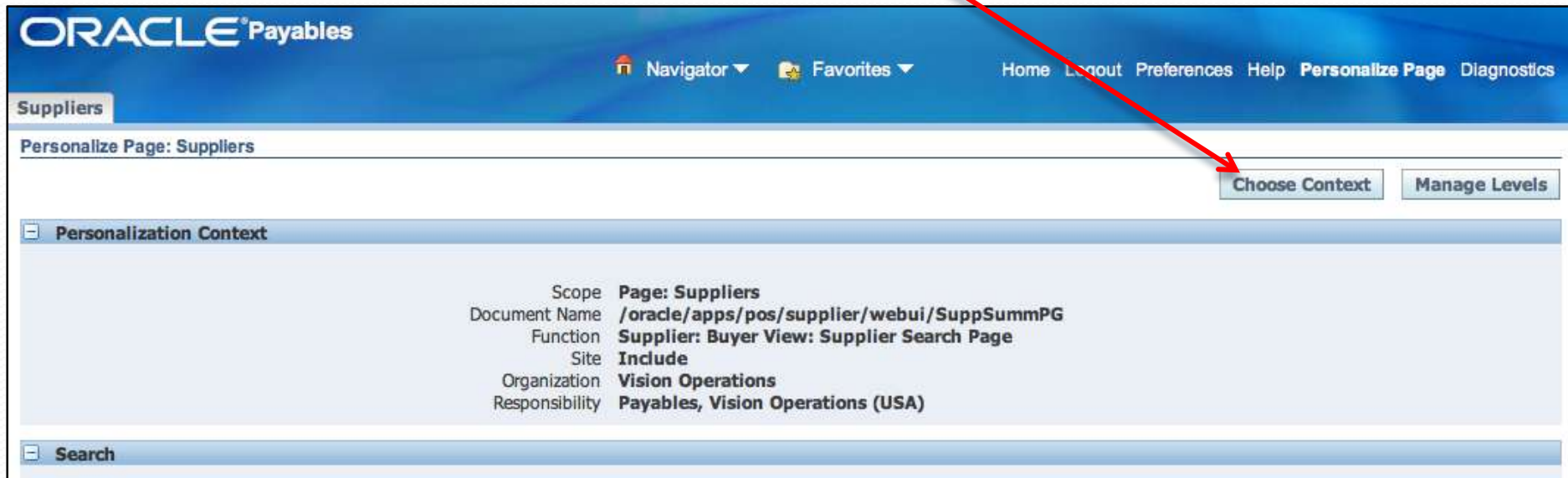
- [New Supplier Requests\(0\)](#)
- [Prospective Supplier Registrations\(0\)](#)
- [Supplier Address Requests \(0\)](#)
- [Supplier Contact Requests \(0\)](#)
- [Supplier Business Classification Requests \(0\)](#)
- [Supplier Product and Services Requests \(17\)](#)
- [Supplier Bank Account Requests\(0/0\)](#)

Suppliers Home Logout Preferences Help Personalize Page Diagnostics

About this Page Privacy Statement

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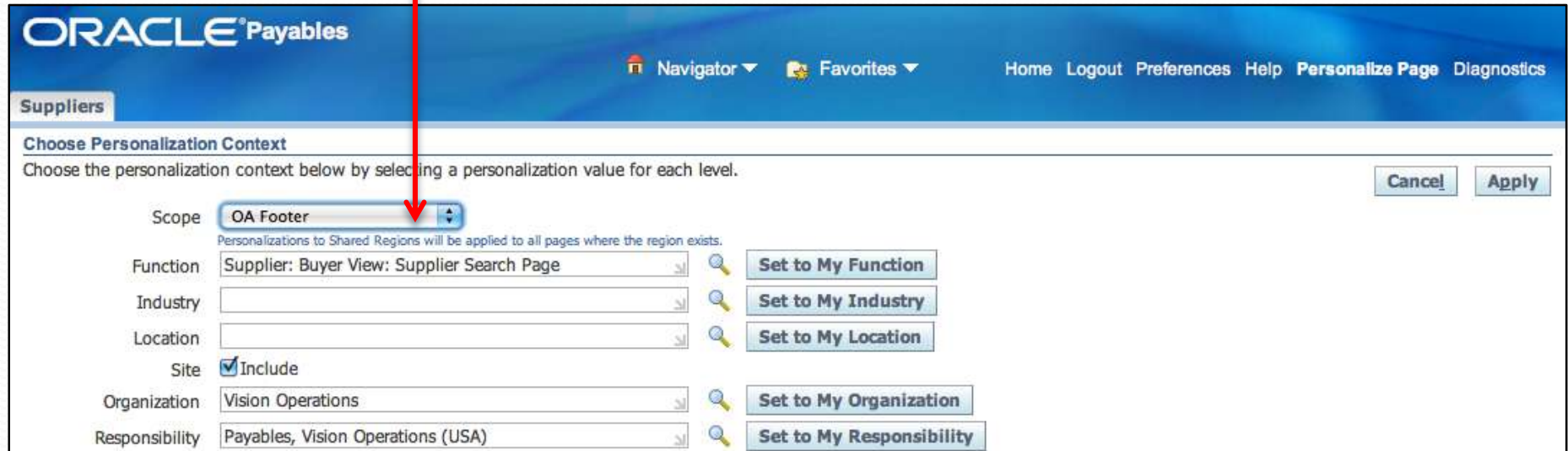
Example 7 – Privacy Statement



The screenshot shows the Oracle Payables web interface. At the top is a blue header with the 'ORACLE Payables' logo on the left and navigation links (Navigator, Favorites, Home, Logout, Preferences, Help, Personalize Page, Diagnostics) on the right. Below the header, a tab labeled 'Suppliers' is active. Underneath the tab is a section titled 'Personalize Page: Suppliers'. To the right of this section are two buttons: 'Choose Context' and 'Manage Levels'. A red arrow points from the top right towards the 'Choose Context' button. Below these buttons is a 'Personalization Context' section containing a table of configuration details. At the bottom of the interface is a 'Search' section.

Scope	Page: Suppliers
Document Name	/oracle/apps/pos/supplier/webui/SuppSummPG
Function	Supplier: Buyer View: Supplier Search Page
Site	Include
Organization	Vision Operations
Responsibility	Payables, Vision Operations (USA)

Example 7 – Privacy Statement



ORACLE[®] Payables

Navigator ▼ Favorites ▼ Home Logout Preferences Help **Personalize Page** Diagnostics

Suppliers

Choose Personalization Context
Choose the personalization context below by selecting a personalization value for each level.

Scope: **OA Footer** (Selected)

Personalizations to Shared Regions will be applied to all pages where the region exists.

Function	Supplier: Buyer View: Supplier Search Page		Set to My Function
Industry			Set to My Industry
Location			Set to My Location
Site	<input checked="" type="checkbox"/> Include		
Organization	Vision Operations		Set to My Organization
Responsibility	Payables, Vision Operations (USA)		Set to My Responsibility

Cancel **Apply**

Example 7 – Privacy Statement

Suppliers

Personalize Region: Standard Footer

[Choose Context](#) [Manage Levels](#)

Personalization Context

Scope: **Region: Standard Footer**
Document Name: **/oracle/apps/fnd/framework/webui/OAFooter**
Function: **Supplier: Buyer View: Supplier Search Page**
Site: **Include**
Organization: **Vision Operations**
Responsibility: **Payables, Vision Operations (USA)**

Search

Personalization Structure

☒ Simple View ☐ Complete View

TIP In simple view mode, some items or regions may not be visible in the page structure and the reorder or create icon may be disabled for certain nodes. Please switch to complete view mode if you need full personalization capabilities over all items and regions.

[Expand All](#) | [Collapse All](#)

Footer: Standard Footer >

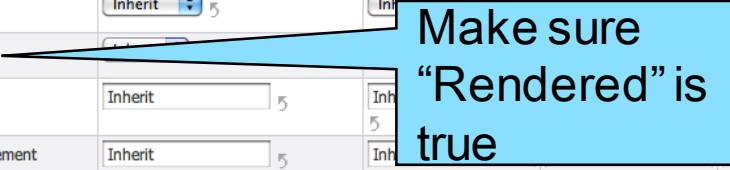
Focus Name	Shown	User Personalizable	Personalize	Reorder	Create	Item Update	Item Delete	Item Seeded	User Views	Show in Complete View
<input type="checkbox"/> Privacy										
Link: Privacy Statement	Yes									


Example 7 – Privacy Statement

- Update the "Destination URI" and click "Apply"
- Return to Application and link will be changed

	Original Definition	Function: Supplier: Buyer View: Supplier Search Page	Site	Organization: Vision Operations	Responsibility: Payables, Vision Operations (USA)	Result / Source
Access Key	Default	Inherit	Inherit	Inherit	Inherit	Default / Original Definition
Admin Personalization	true	Inherit	Inherit	Inherit	Inherit	true / Original Definition
CSS Class	OraPrivacy	Inherit	Inherit	Inherit	Inherit	OraPrivacy / Original Definition
Destination Function	Default	Inherit	Inherit	Inherit	Inherit	Default / Original Definition
Destination URI	http://personalize.this.link	www.infosemantics.com	Inherit	Inherit	Inherit	This is my custom privacy statement / Function
Popup Enabled	false	Inherit	Inherit	Inherit	Inherit	false / Original Definition
Popup ID	Default	Inherit	Inherit	Inherit	Inherit	Default / Original Definition
Popup Render Event	onClick	Inherit	Inherit	Inherit	Inherit	onClick / Original Definition
Rendered	true	Inherit	Inherit	Inherit	Inherit	true / Original Definition
Target Frame	Default	Inherit	Inherit	Inherit	Inherit	Default / Original Definition
Text	Privacy Statement	Inherit	Inherit	Inherit	Inherit	Privacy Statement / Original Definition
User Personalization	false	Inherit	Inherit	Inherit	Inherit	false / Original Definition

Clear Personalization






 Make sure "Rendered" is true



✓ TIP The table rows show the personalizable properties for the object. Table columns show the personalization levels for each property. Any property set to inherit will assume its value from the next highest level.

Example 8 – Export Button

- Create an export button to download contacts for a supplier
 - Refer to the Oracle BLAF UI Guideline: Export/Import Page Templates [OTN version] for the placement of the Export button
- Go to the page where you want to add an export button and click “personalize page”
 - In this example, Supplier → Contact Directory

Suppliers						
Suppliers >						
Update Dell Computers - 5092: Contact Directory						
Create						
First Name	Last Name	Phone Number	Email Address	Has User Account	Status	Update
Christiane	Hellweg				Current	
Grover	Harrison	276 333-0000	nobody@localhost	✓	Current	
Hans	Krijgsman	015 - 8723852	nobody@localhost	✓	Current	
Hans	Krijgsman				Current	
Kent	Bedding	800 5558355			Current	

Example 8 – Export Button


- Click the “Create Item” icon for the Page Layout










Personalization Structure

☒ Simple View ☐ Complete View

TIP In simple view mode, some items or regions may not be visible in the page structure and the reorder or create icon may be disabled for certain nodes. Please switch to complete view mode if you need full personalization capabilities over all items and regions.

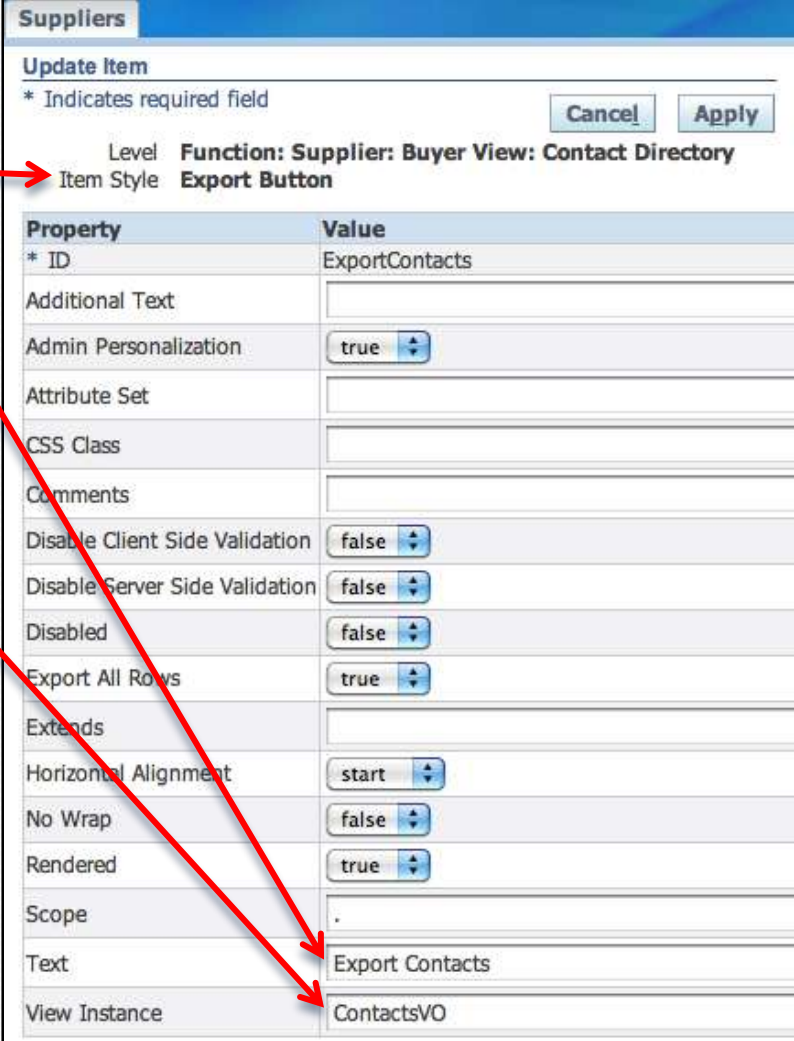
[Expand All](#) | [Collapse All](#)



Focus Name	User Shown	Personalizable	Personalize	Reorder	Create Item	Update Item	Delete Item	Seeded User Views	Show in Complete View
 Page Layout	Yes								
 Corporate Branding									
Image: (corporateBranding)	Yes								

Example 8 – Export Button

- Choose Item Style “Export Button”
- The data in the Text field will appear in the button
- Set the View Instance name to the view object associated with the region
 - See About This Page



Suppliers

Update Item

* Indicates required field

Cancel Apply

Level: Supplier: Buyer View: Contact Directory
Item Style: **Export Button**

Property	Value
* ID	ExportContacts
Additional Text	
Admin Personalization	true
Attribute Set	
CSS Class	
Comments	
Disable Client Side Validation	false
Disable Server Side Validation	false
Disabled	false
Export All Rows	true
Extends	
Horizontal Alignment	start
No Wrap	false
Rendered	true
Scope	.
Text	Export Contacts
View Instance	ContactsVO

Example 8 – Export Button

Suppliers > Update Dell Computers - 5092: Contact Directory > Logged In As **OPERATIONS**

About Page: Update Dell Computers - 5092: Contact Directory


[Printable Page](#) [Generate Bug Report](#)



[Page](#) [Personalization](#) [Page Context](#) [Technology Components](#) [Java System Properties](#) [Profiles](#) [Patches](#)

/oracle/apps/pos/supplier/webui/ByrCntctDirPG 120.14.12010000.3

Page Definition

[Expand All](#) | [Collapse All](#)



Focus Name	Controller	Application Module	View Object	View Attribute
<input type="checkbox"/> pageLayout	ByrCntctDirCO	ByrSuppAM		
rawText: <noscript>JavaScript enabled browser re...				
 <input type="checkbox"/> stackLayout				
 <input type="checkbox"/> table: Contacts Table			ContactsVO	
messageStyledText: First Name			ContactsVO	PersonFirstName
messageStyledText: Last Name			ContactsVO	PersonLastName
messageStyledText: Phone Number			ContactsVO	PrimaryPhoneNumber

About this Page →
Page Tab →
View Object
Column

Example 8 – Export Button

- Now clicking the new “Export Contacts” button will export data to a .csv file

The screenshot displays the Oracle Suppliers application interface. On the left is a navigation menu with categories like 'Quick Update', 'Company Profile', 'Contact Directory', and 'Terms and Control'. The main area shows a table of suppliers with columns: First Name, Last Name, Phone Number, Email Address, Has User Account, Status, and Update. Below the table is an 'Export Contacts' button, which is highlighted with a red rectangle. At the bottom of the application window, a download bar shows a file named 'export (1).csv', also highlighted with a red rectangle. The footer of the application includes links for 'About this Page', 'Privacy Statement', and 'Suppliers', along with a copyright notice for Oracle 2006.

First Name	Last Name	Phone Number	Email Address	Has User Account	Status	Update
Christiane	Hellweg				Current	
Grover	Harrison	276 333-0000	nobody@localhost	✓	Current	
Hans	Krijgsman	015 - 8723852	nobody@localhost	✓	Current	
Hans	Krijgsman				Current	
Kent	Redding	800 5558355		✓	Current	
Kent	Redding				Current	
Larry	Denison	512 324-9988	nobody@localhost	✓	Current	
Linda	Warnock	626 342-4534	nobody@localhost	✓	Current	
Phyllis	Ricci	213 324-5432	nobody@localhost	✓	Current	
Ralph	Zito	650 432-9980	nobody@localhost	✓	Current	
Sebastian	Kirch			✓	Current	
Sebastian	Kirch				Current	

Example 9 – Submit Concurrent Request

- Add a button to submit a concurrent request from the Supplier Invoice Management page to print the Supplier Open Balance Letter
 - Create a button similar to the previous example
- Assigning the function FND CPSRSSWA to the destination function for the button would call the submit current request with no parameters

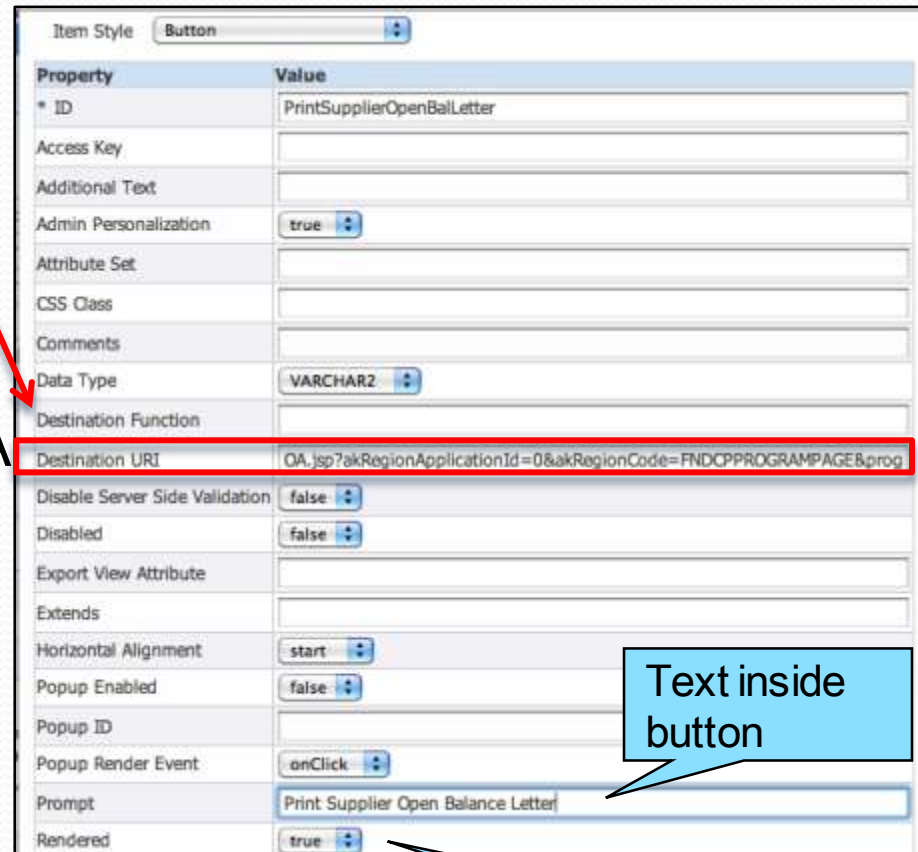
The screenshot shows the Oracle Payables interface. The top navigation bar includes 'Navigator', 'Favorites', and links for 'Home', 'Logout', 'Preferences', 'Personalize Page', and 'Diagnostics'. The left sidebar lists various supplier-related functions. The main content area is titled 'Suppliers > Update Advanced Network Devices - 1013: Invoice Management'. It contains fields for 'Invoice Currency' (set to 'US dollar'), 'Invoice Amount Limit', and 'Invoice Match Option' (set to 'Purchase Order'). There are also checkboxes for 'From Payment' with options 'All Invoices', 'Unmatched Invoices', and 'Unvalidated Invoices'. At the bottom right of the main area are 'Cancel' and 'Save' buttons. A blue callout box with the text 'Choose Personalize Page' has an arrow pointing to the 'Personalize Page' link in the top navigation bar.

Example 9 – Submit Concurrent Request

- Instead of using the “Destination Function”, create the button with the following code in the Destination URI to pass parameters

OA.jsp?akRegionApplicationId=0
&akRegionCode=FNDCPPROGRAMPAGE

&programApplName=SQLAP
&programName=APXSOBLX
&programRegion=Hide
&scheduleRegion=Hide
¬ifyRegion=Hide
&printRegion=Hide



Property	Value
* ID	PrintSupplierOpenBalLetter
Access Key	
Additional Text	
Admin Personalization	true
Attribute Set	
CSS Class	
Comments	
Data Type	VARCHAR2
Destination Function	
Destination URI	OA.jsp?akRegionApplicationId=0&akRegionCode=FNDCPPROGRAMPAGE&programApplName=SQLAP&programName=APXSOBLX&programRegion=Hide&scheduleRegion=Hide¬ifyRegion=Hide&printRegion=Hide
Disable Server Side Validation	false
Disabled	false
Export View Attribute	
Extends	
Horizontal Alignment	start
Popup Enabled	false
Popup ID	
Popup Render Event	onClick
Prompt	Print Supplier Open Balance Letter
Rendered	true

Text inside
button

Rendered =
true

Example 9 – Submit Concurrent Request

Suppliers >

Update Advanced Network Devices - 1013: Invoice Management

Invoice Currency: US dollar ▼

Invoice Amount Limit:

Invoice Match Option: Purchase Order ▼

Cancel Save Print Supplier Open Balance Letter

Click New button

Unpaid from Payment ☐ All Invoices
☐ Unmatched Invoices
☐ Unvalidated Invoices

- Concurrent request page with program name is displayed
- All pages hidden except parameters page and review page

Layout Review

Schedule Request: Parameters

* Indicates required field

Cancel Submit Step 1 of 3 Next

Program Name **Supplier Open Balance Letter**

Request Name

* As of Date

Supplier Name From

Supplier Name To

Currency

Include Prepayments

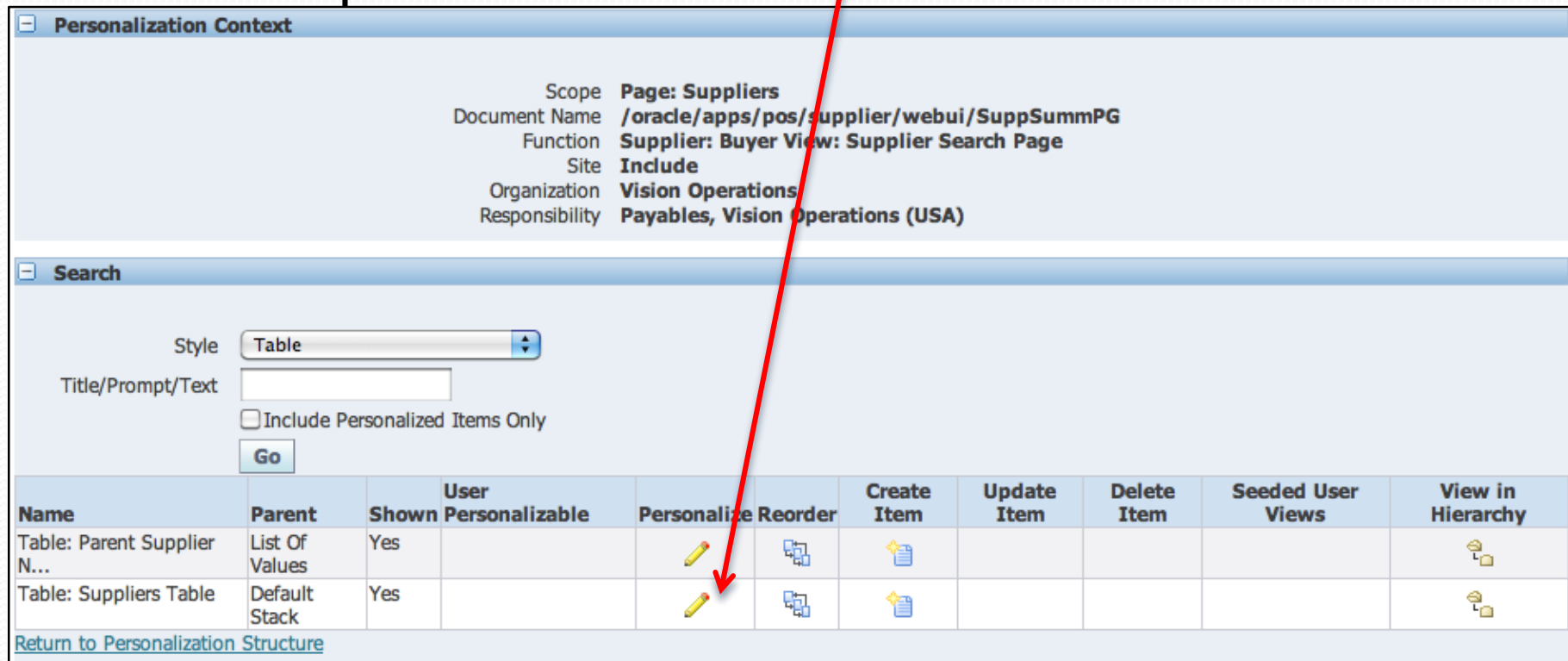
Minimum Invoice Balance 0

Minimum Open Balance 0

Reference Number

Example 10 – Modify Query

- Exclude “Employees” in Supplier search for specific responsibility
 - In the supplier page, click personalize page
 - Search for the style “Table”, find the correct table, and click the pencil











Personalization Context

Scope **Page: Suppliers**
Document Name **/oracle/apps/pos/supplier/webui/SuppSummPG**
Function **Supplier: Buyer View: Supplier Search Page**
Site **Include**
Organization **Vision Operations**
Responsibility **Payables, Vision Operations (USA)**

Search

Style **Table**
Title/Prompt/Text
☐ Include Personalized Items Only
Go

Name	Parent	Shown	User Personalizable	Personalize	Reorder	Create Item	Update Item	Delete Item	Seeded User Views	View in Hierarchy
Table: Parent Supplier N...	List Of Values	Yes								
Table: Suppliers Table	Default Stack	Yes								

[Return to Personalization Structure](#)





Example 10 – Modify Query

- Click on the query icon at the desired personalization level

Personalize Table : Suppliers Table Cancel Apply

Personalization Context

Scope **Page: Suppliers**
Document Name **/oracle/apps/pos/supplier/webui/SuppSummPG**
Function **Supplier: Buyer View: Supplier Search Page**
Site **Include**
Organization **Vision Operations**
Responsibility **Payables, Vision Operations (USA)**

						Original Definition
Personalize Properties	false	<input type="text" value="Inherit"/>	<input type="text" value="Inherit"/>	<input type="text" value="Inherit"/>	<input type="text" value="Inherit"/>	false / Original Definition
User Personalization						
Width	100%	<input type="text" value="Inherit"/>	<input type="text" value="Inherit"/>	<input type="text" value="Inherit"/>	<input type="text" value="Inherit"/>	100% / Original Definition
Query						

Example 10 – Modify Query

- Add filters needed in Create Query form
 - The Add Another field is used to add additional fields for filtering

Create Query

Cancel Apply

Data Filter

Clear Filter

☒ Show table data when all conditions are met.
☐ Show table data when any condition is met.

Supplier Name	is	
Supplier Number	is	
Parent Supplier Name	is	
Taxpayer ID	is	
Supplier Type	is not	Employee

Add Another Supplier Type Add

Sorting

Example 10 – Modify Query

- No Results Found for Type “Employee”

Search

At least one search criteria is required. Including part of supplier's name or number will improve the search performance. Fields are case insensitive.

Supplier Name	<input type="text"/>	Tax Registration Number	<input type="text"/>
Supplier Number	<input type="text"/>	D-U-N-S Number	<input type="text"/>
Taxpayer ID	<input type="text"/>	Employee Number	<input type="text"/>

☐ [Hide More Options](#)

Alternate Supplier Name	<input type="text"/>	Reporting Name	<input type="text"/>
Inactive Date From	<input type="text"/>	To	<input type="text"/>
(example: 14-Jun-2011)		(example: 14-Jun-2011)	
One Time	<input type="checkbox"/>	Payment Terms	<input type="text"/>
Supplier Type	<input type="text" value="Employee"/>	Pay Group	<input type="text"/>
Parent Supplier Name	<input type="text"/>	Federal Reportable	<input type="checkbox"/>
Parent Supplier Number	<input type="text"/>	Income Tax Type	<input type="text"/>
Payment Priorities From	<input type="text"/>	To	<input type="text"/>
State Reportable	<input type="checkbox"/>		

Search Results

Select Supplier Name	Supplier Number	Parent Supplier Name	Taxpayer ID	Tax Registration Number	D-U-N-S Number
No results found.					

Don't forget testing!

Customizations or Personalizations, whether they are protected or non protected, allow you to fundamentally change the behavior of the application.

This could interfere with intended functionality.

Use with caution!

TEST! TEST! TEST! TEST! TEST!

TESTING



**...THEN TEST IT
AGAIN!**

*****BUT NOT IN PRODUCTION****

Migration - Forms Personalizations

- Download for a specific form:
 - FNDLOAD <userid>/<password> 0 Y DOWNLOAD
\$FND_TOP/patch/115/import/affrmcus.lct <filename.ldt>
FND_FORM_CUSTOM_RULES form_name=<form name>
- Download all personalizations
 - FNDLOAD <userid>/<password> 0 Y DOWNLOAD
\$FND_TOP/patch/115/import/affrmcus.lct <filename.ldt>
FND_FORM_CUSTOM_RULES
- Upload
 - FNDLOAD <userid>/<password> 0 Y UPLOAD
\$FND_TOP/patch/115/import/affrmcus.lct <filename.ldt>

Migration - OAF Personalizations

- Migrate OA Framework Personalizations from the Functional Administrator Responsibility
 - Export to directory defined in FND: Personalization Document Root Path
 - FTP to target instance
 - Import from Document Root Path directory

The screenshot displays the Oracle Applications Administration web interface. The top navigation bar includes links for Home, Logout, Preferences, Help, Personalize Page, and Diagnostics. Below this, a tabbed interface shows 'Security', 'Core Services', 'Personalization' (selected), and 'File Manager'. Under the 'Personalization' tab, there are two sub-tabs: 'Application Catalog' and 'Import/Export', with the latter highlighted by a red rectangle. The main content area is titled 'Application Catalog' and features a search section with input fields for 'Application', 'Document Path', and 'Last Updated'. A 'Go' button is at the bottom of the search section. To the right, a 'Personalization Shortcuts' box contains a link to 'Standard Footer'.

Query for OAF Pages with Personalizations

- Note that because many OA Framework-based personalizations are shipped with Oracle E-Business Suite either as "seeded developer" or "localization" personalizations, this list can be much longer than you expect
 - There is currently no way to tell, other than by looking at the actual personalization or personalization document, whether a shipped personalization has been further personalized at your site

```
SELECT PATH.PATH_DOCID PERZ_DOC_ID,  
jdr_mds_internal.getdocumentname(PATH.PATH_DOCID)  
PERZ_DOC_PATH  
FROM JDR_PATHS PATH  
WHERE PATH.PATH_DOCID IN  
  (SELECT DISTINCT COMP_DOCID FROM JDR_COMPONENTS  
   WHERE COMP_SEQ = 0 AND COMP_ELEMENT = 'customization'  
   AND COMP_ID IS NULL)  
ORDER BY PERZ_DOC_PATH
```

Query for OAF Personalizations Created by Customer

- [My Oracle Support Document 1292611.1](#)
- This query does not include the seeded personalizations
 - Use this query with care if shipped personalizations have been further personalized at your site

```
SELECT PATH.PATH_DOCID PERZ_DOC_ID,  
       jdr_mds_internal.getdocumentname(PATH.PATH_DOCID) PERZ_DOC_PATH  
FROM JDR_PATHS PATH  
WHERE PATH.PATH_DOCID IN  
      (SELECT DISTINCT COMP_DOCID FROM JDR_COMPONENTS  
       WHERE COMP_SEQ = 0 AND COMP_ELEMENT = 'customization'  
       AND COMP_ID IS NULL)  
MINUS  
SELECT PATH.PATH_DOCID PERZ_DOC_ID,  
       jdr_mds_internal.getdocumentname(PATH.PATH_DOCID) PERZ_DOC_PATH  
FROM JDR_PATHS PATH  
WHERE PATH.PATH_DOCID IN  
      (SELECT DISTINCT COMP_DOCID FROM JDR_COMPONENTS, JDR_ATTRIBUTES  
       WHERE COMP_SEQ = 0 AND COMP_ELEMENT = 'customization'  
       AND COMP_ID IS NULL  
       AND ATT_COMP_DOCID = COMP_DOCID  
       AND ATT_COMP_SEQ = 0  
       AND ATT_NAME = 'developerMode'  
       AND ATT_VALUE = 'true')
```

Query for Forms Personalizations

set pages 999
set lines 999

column Description for a45
column Function for a13
column Form for a9
column Condition for a35
column TriggerObject for a20
column TriggerEvent for a26

```
SELECT form_name Form, function_name Function, description  
Description,  
       sequence Seq, trigger_event TriggerEvent, trigger_object  
TriggerObject,  
       condition Condition, enabled  
FROM fnd_form_custom_rules  
ORDER BY form_name, function_name, sequence
```

Read-Only Diagnostics in 12.1.3

- Profile option “Hide Diagnostics Menu Entry” should be set to “No”
- Assign one or more of the read only functions to the menu where this functionality is needed

Function Name	Purpose
FND Diagnostics Menu Examine Read Only	Read only for Help → Diagnostics → Examine
FND Diagnostics Personalize Read Only	Read only for Help → Diagnostics → Custom Code
FND Diagnostics Values Read Only	Read only for Help → Diagnostics → Properties

Read-Only Diagnostics 12.1.3

- Example - Payables, Vision Operations (USA) responsibility linked to menu AP_NAVIGATE_GUI12
 - Leave prompt and Submenu null

Menu: AP_NAVIGATE_GUI12 View Tree...

User Menu Name: AP_NAVIGATE_GUI12

Menu Type: Standard

Description: AP Navigate Menu

Seq	Prompt	Submenu	Function	Description	Grant
25			FND Diagnostics%Read%		<input checked="" type="checkbox"/>
19	Functions				<input checked="" type="checkbox"/>
31					<input checked="" type="checkbox"/>
32	Find		FND Diagnostics%Read%		<input checked="" type="checkbox"/>
33					<input checked="" type="checkbox"/>
49					<input checked="" type="checkbox"/>
66					<input checked="" type="checkbox"/>
84					<input checked="" type="checkbox"/>

User Function Name	Function Name	Description
FND Diagnostics Menu Examine Read Only	FND_DIAGNOSTIC...	This permission is use
FND Diagnostics Personalize Read Only	FND_DIAGNOSTIC...	This permission is use
FND Diagnostics Values Read Only	FND_DIAGNOSTIC...	This permission is use

Summary

- Personalizations reduce customizations
- Personalizations are easy to implement
- Personalizations can save you money
 - Less customizations result in lower maintenance cost and lower patching/upgrade costs
 - Increase compliance reducing audit cost
 - Speed up data entry
 - Decrease error rates
 - Reduce training costs
 - Make users self sufficient

References

- Oracle Application Framework Personalization Guide
- Oracle Applications User Interface Standards for Forms-Based Products
- Oracle Applications Developer's Guide
- Oracle Applications System Administrator's Guide
- Oracle Applications User Guide
- My Oracle Support ID: 279034.1 – Forms Personalization

Q & A

Thank You!

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