

Forms and OA Framework Personalizations The Top Ten Examples

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Agenda

- Overview of Personalization Tools
- Forms Personalization
 - Setup and Use
 - Examples 1 – 5
 - Tips
- OA Framework Personalization Examples
 - Setup
 - Examples 6 - 10
- Migration to other instances
- References



Overview

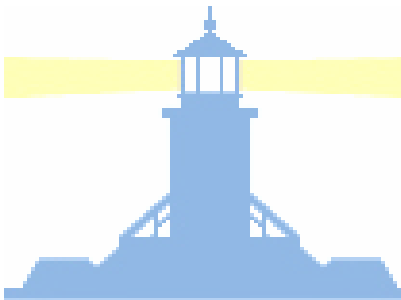
- Personalizations – alter behavior or appearance using tools provided by Oracle
 - Supported and generally survive patches
- Personalization Tools
 - CUSTOM.pll
 - Forms personalizations
 - Professional Forms 6*i* or 10*g*
 - OA Framework Personalizations



Overview – CUSTOM.pll


- Prior to 11.5.10, CUSTOM.pll is the only form personalization tool
- Library in \$AU_TOP/resource
 - Use forms builder development tool to modify package body
- Requires developer skills
- Generally survives patches
- Supported by Oracle **with limitations
- Documented in Application Developer Guide





Overview – Forms Personalization

- Forms Personalizations declaratively alter the behavior of Forms delivered with the E-Business Suite
- Requires superuser with some sql skills
- Most changes traditionally done using CUSTOM.pll can be accomplished using Forms Personalization
- Effective immediately – no compiling
- Forms Personalizations fire prior to CUSTOM.pll for the same event



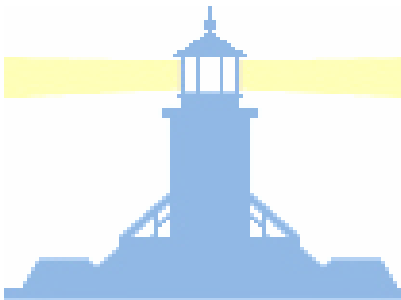
Overview – Forms Personalizations and CUSTOM.pll – What you can do?

- Hide fields, tabs
- Make fields required
- Restrict insert or update
- Change prompts and labels
- Alter LOVs
- Set default values
- Create tool bar menu items
 - Call other forms or web address
 - Execute code



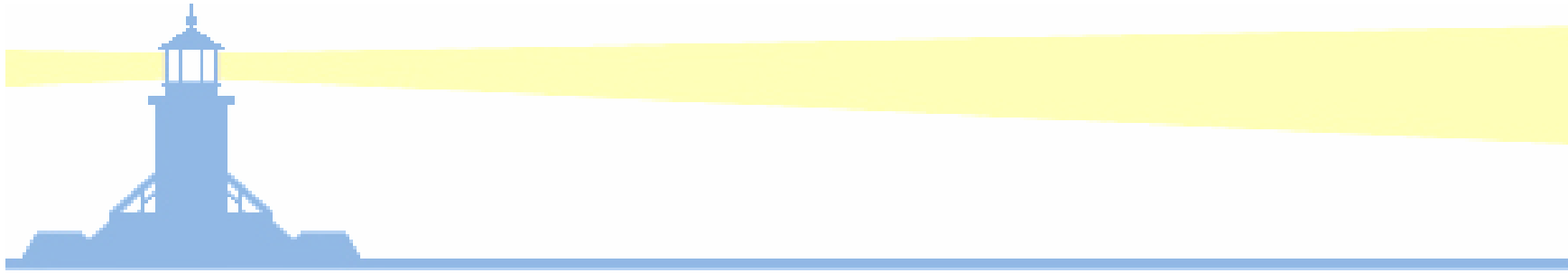
Overview – OA Framework Personalizations

- OA Framework Personalization is for self-service applications
 - Introduced with 11.5.9
 - Apply Patch 3323690
 - Standard with 11.5.10 and Release 12
- Requires functional superuser
 - Minimal technical expertise required



Overview – OA Framework Personalizations – What you can do?

- Remove Buttons and Change Button Names
- Change Page and Section Headers
- Hide Columns
- Change Field and Column Names
- Set Initial Values
- Change Field Attributes
- Reorder Columns
- Add Items (Buttons, Fields, Tips and more)



Forms 6*i* and 10*g* Personalizations

Setup and Use

Examples 1 – 5

Tips



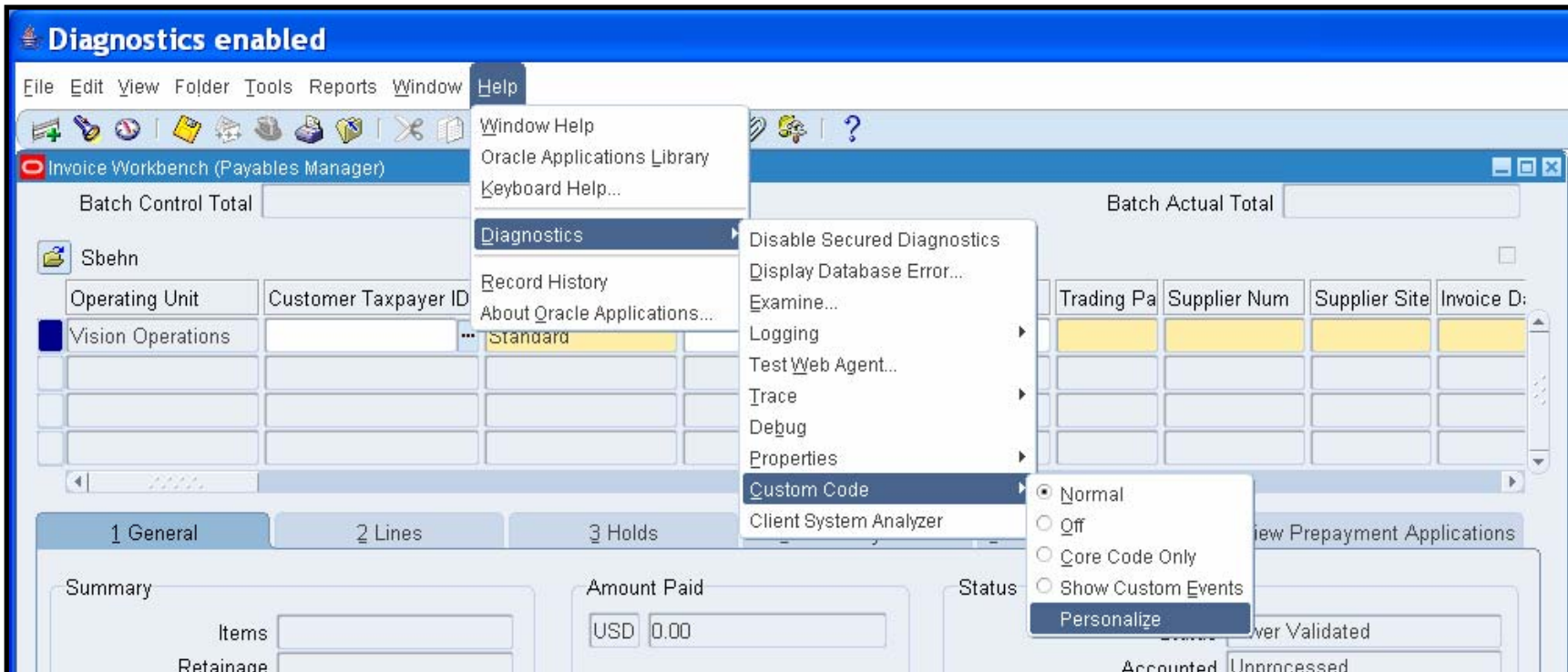
Setup – Profile Options – Form Personalizations

- Hide Diagnostics menu entry
 - Set to No to see the menu
- Utilities: Diagnostics
 - Set to No to require apps password



Accessing Forms Personalization

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



The screenshot shows the Oracle Invoice Workbench interface. The 'Help' menu is open, and the 'Diagnostics' option is selected. The 'Diagnostics' sub-menu is also open, showing the 'Custom Code' option. The 'Custom Code' sub-menu is open, showing the 'Personalize' option. The background shows the 'Invoice Workbench (Payables Manager)' window with various fields and a table.

Trading Pa	Supplier Num	Supplier Site	Invoice D:

Forms Personalization

Form Personalizations (Invoices)

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

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

1 - 100 Reusable

Show Debug Messages
Step-by-Step
Off

Form/Function
Default = Function
Most often should be Form

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

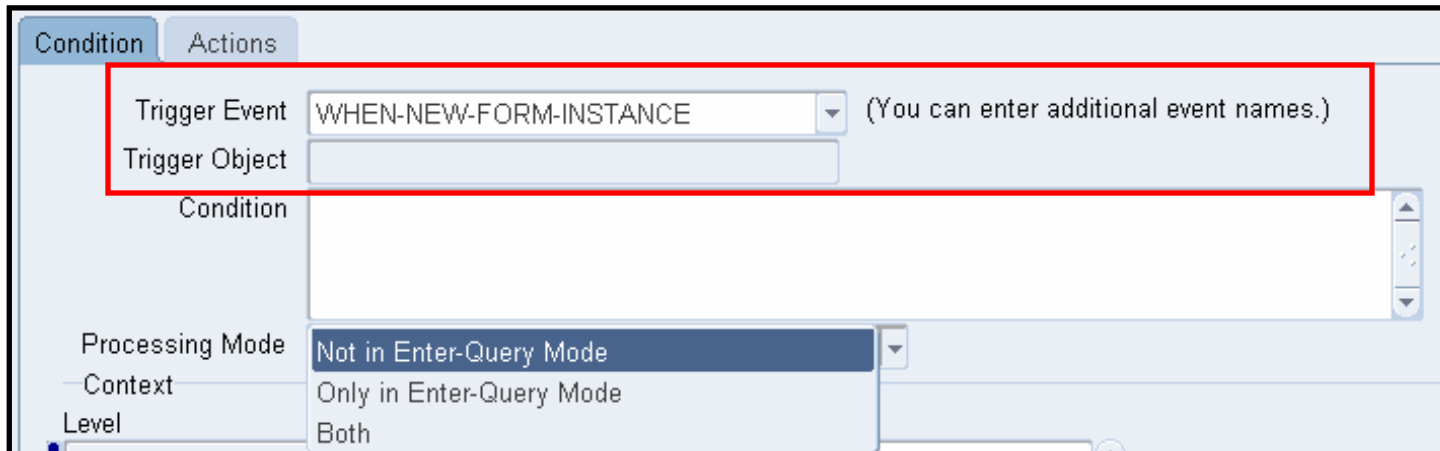
Level	Value

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

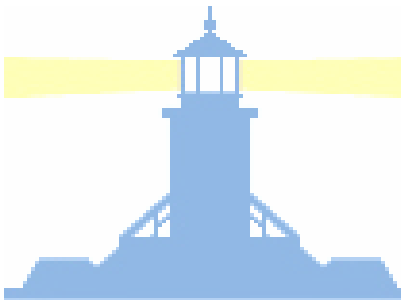


Forms Personalization – Condition Tab

- Trigger event determines when the rule fires
 - Use standard trigger events (next slide)
 - Use specific events unique to the form (**With Caution**)
 - Find additional events using Help →Diagnostics →Custom Code →Show Custom Events
- Trigger object depends on trigger event
 - WHEN-NEW-BLOCK-INSTANCE requires block name



The screenshot shows the Oracle Forms Personalization interface, specifically the Condition tab. A red box highlights the Trigger Event and Trigger Object fields. The Trigger Event is set to 'WHEN-NEW-FORM-INSTANCE' with a dropdown arrow and a note '(You can enter additional event names.)'. The Trigger Object field is empty. Below the Condition section, the Processing Mode is set to 'Not in Enter-Query Mode', and the Level is set to 'Both'.




Forms Personalization – 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



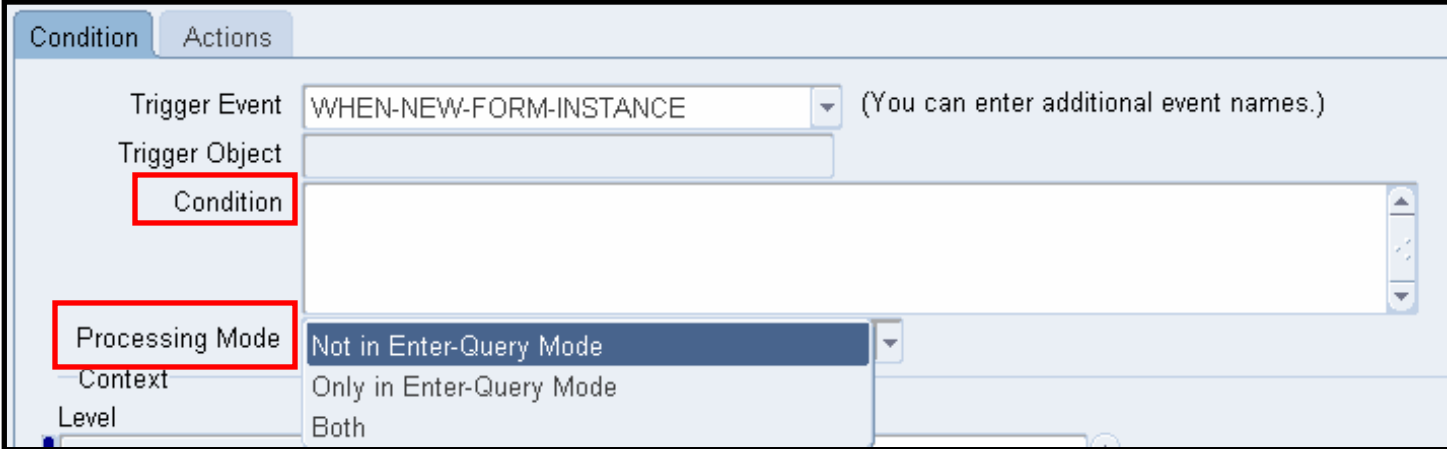
Forms Personalization – Standard Trigger Events

- **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)



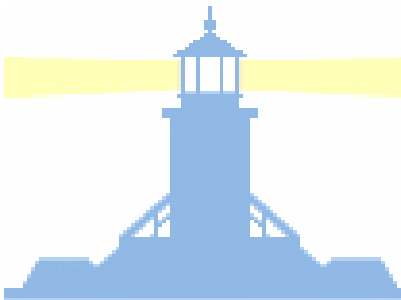
Forms Personalization – Condition Tab

- Condition
 - Optional SQL code fragment to limit scope of rule
 - Use bind variables (:block.field)
- Processing Mode
 - How rule behaves in query mode vs entry mode



The screenshot shows the Oracle Forms Personalization interface for the Condition tab. 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' (highlighted with a blue bar and a red box), 'Only in Enter-Query Mode', and 'Both'.

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



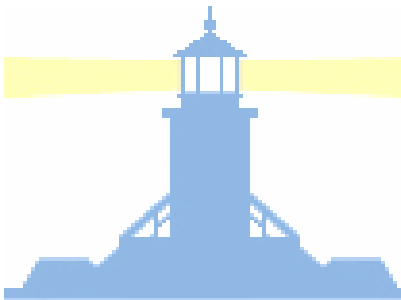
Forms Personalization – Context

- 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



Forms Personalization – Property Actions

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

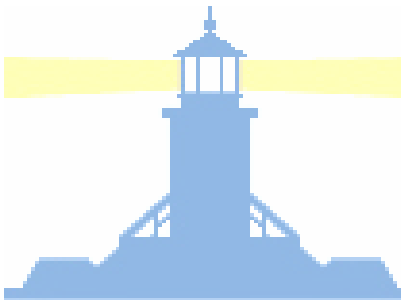
Seq	Type	Description	Language	Enabled
	Property		All	<input checked="" type="checkbox"/>
	Message			<input type="checkbox"/>
	Builtin			<input type="checkbox"/>
	Menu			<input type="checkbox"/>

Object Type: Item
Target Object:
Property Name: PROMPT_TEXT
Value:
Get Value

Select By Text...
Validate
Apply Now

Insert 'Get' Expression...
Insert Item Value...

Prompts change depending on action type



Top Ten Rule #1 – Display Message

- GL Journal Entry – Remind users to change the period name the first 20 days of the fiscal year

Enter header details

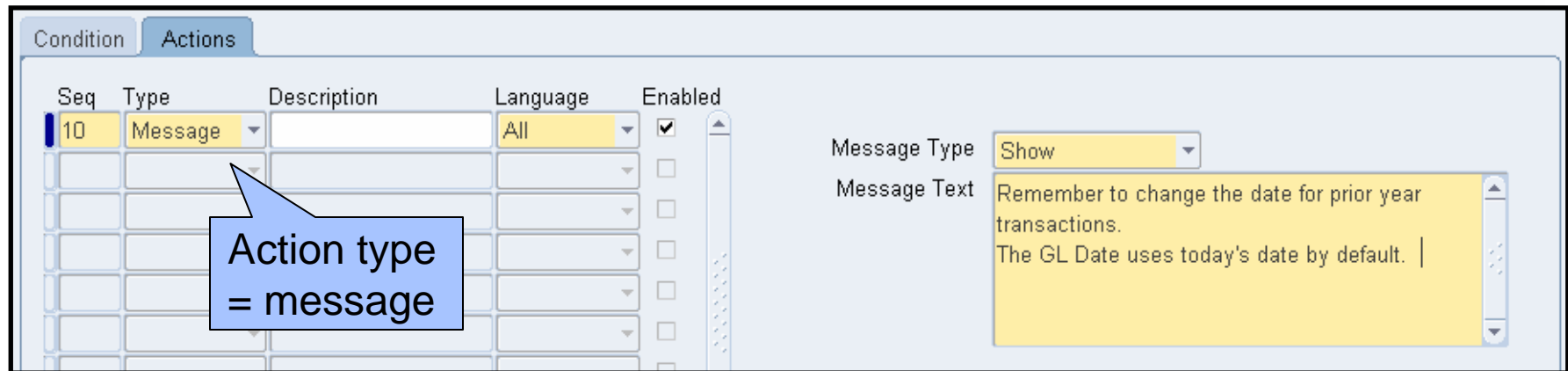
The screenshot shows the Oracle Form Personalizations window for 'Enter Journals'. The window title is 'Form Personalizations (Enter Journals)'. It contains the following fields and controls:

- Function Name: GLXJEENT_A
- Form Name: GLXJEENT
- Debug Mode: Off
- Table with columns: Seq, Description, Level, Enabled. Row 1: 10, GL Date Warning for beginning of fiscal year, Form, [checked].
- Condition tab selected. Fields: Trigger Event (WHEN-NEW-ITEM-INSTANCE), Trigger Object (HEADER.NAME), Condition (to_char(SYSDATE,'MON') = 'FEB' and to_char(SYSDATE,'DD') <= 20).
- Processing Mode: Not in Enter-Query Mode
- Level: User, Value: SBEHN

Condition is checked when the user accesses the journal name field

Message appears Feb 1 – Feb 20 every year

Top Ten Rule #1 – Display Message



The screenshot shows the 'Actions' tab of the Oracle Top Ten Rule configuration. A table lists the actions, with the first row selected:

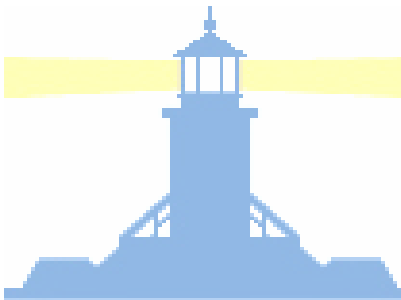
Seq	Type	Description	Language	Enabled
10	Message		All	<input checked="" type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input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

A callout box points to the 'Message' type in the table with the text: "Action type = message".

On the right side of the interface, the 'Message Type' is set to 'Show' and the 'Message Text' is: "Remember to change the date for prior year transactions. The GL Date uses today's date by default."

- 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`




Top Ten Rule #1 – Display Message

- Result

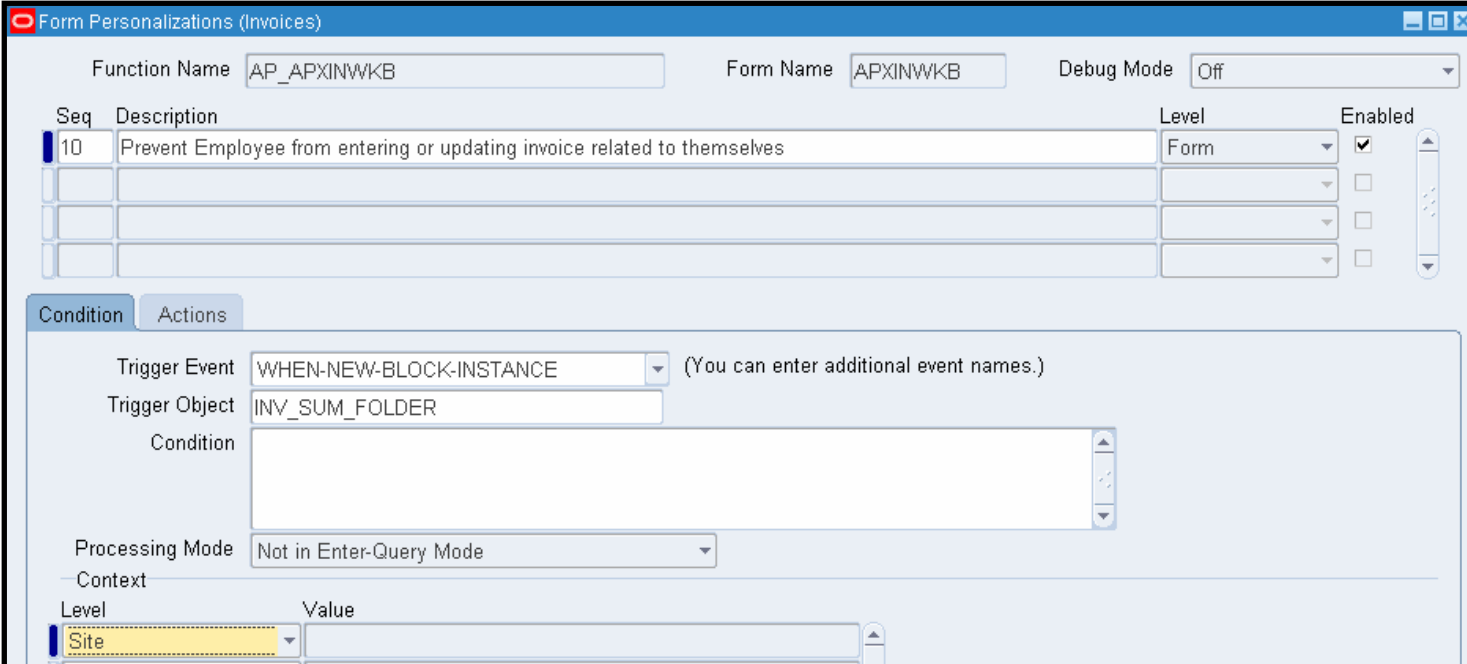
The screenshot shows the 'Journals (Vision Operations (USA)) - [New]' window. The form includes fields for Journal, Description, Ledger (Vision Operations (L)), Category (Adjustment), Period (Jan-08), Effective Date (31-JAN-2008), Balance Type (Actual), Budget, Tax (Not Required), Clearing Company, Journal Type (Standard), Control Total, Conversion (Currency: USD, Date: 31-JAN-2008, Type: User, Rate: 1), and Reverse (Date, Period, Method: Switch Dr/Cr, Status: Not Reversed). A 'Note' dialog box is open in the foreground with the text: 'Remember to change the date for prior year transactions. The GL Date uses today's date by default.' and an 'OK' button. A callout line points from the 'OK' button to a text box below.

Click OK to continue



Top Ten Rule #2 – Data Access Restrictions

- A user should not be able to enter or retrieve their own invoice
 - Enter header and condition tab details



The screenshot shows the Oracle Form Personalizations (Invoices) window. The Function Name is AP_APXINWKB, Form Name is APXINWKB, and Debug Mode is Off. A table lists a rule with Seq 10, Description 'Prevent Employee from entering or updating invoice related to themselves', Level Form, and Enabled checked. The Condition tab is active, showing Trigger Event WHEN-NEW-BLOCK-INSTANCE, Trigger Object INV_SUM_FOLDER, and Processing Mode Not in Enter-Query Mode. The Level is Site.

Seq	Description	Level	Enabled
10	Prevent Employee from entering or updating invoice related to themselves	Form	<input checked="" type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

Condition

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

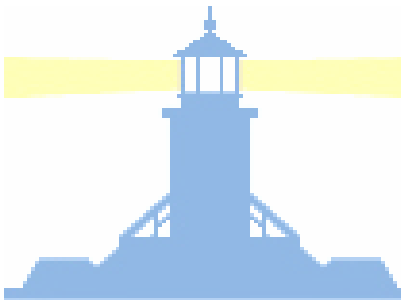
Trigger Object: INV_SUM_FOLDER

Condition:

Processing Mode: Not in Enter-Query Mode

Context:

Level: Site



Top Ten Rule #2 – Data Access Restrictions

- Change the default where clause for the invoice block to prevent retrieval of employee invoices based on user id

Seq	Type	Description	Language	Enabled
10	Property	Modify default where	All	<input checked="" type="checkbox"/>

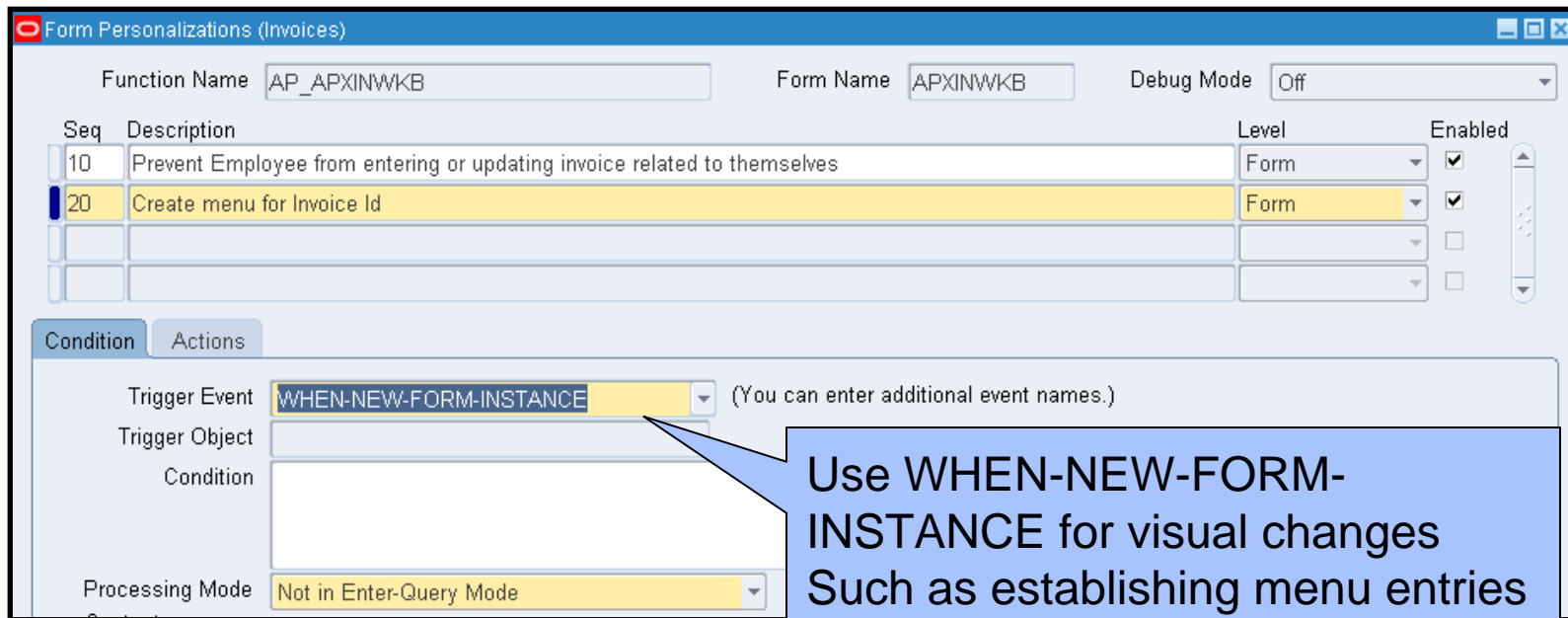
Object Type: Block
Target Object: INV_SUM_FOLDER
Property Name: DEFAULT_WHERE
Value: WHERE fusr.user_id = fnd_profile.value ('USER_ID') AND fusr.employee_id = pv.employee_id

```
vendor_id NOT IN  
(SELECT vendor_id  
FROM po_vendors pv ,  
fnd_user fusr  
WHERE fusr.user_id = fnd_profile.value('USER_ID')  
AND fusr.employee_id = pv.employee_id )
```



Top Ten Rule #3 – Menu Entries

- Create a menu item to display the invoice id
 - Helpful for workflow and approval troubleshooting
- Step 1 – establish the menu entry



Form Personalizations (Invoices)

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

Seq	Description	Level	Enabled
10	Prevent Employee from entering or updating invoice related to themselves	Form	<input checked="" type="checkbox"/>
20	Create menu for Invoice Id	Form	<input checked="" type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

Condition Actions

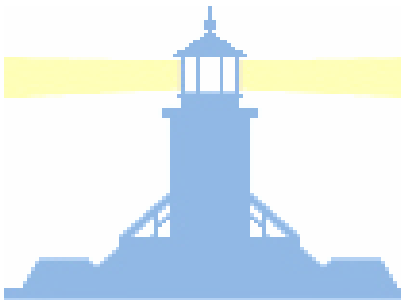
Trigger Event: WHEN-NEW-FORM-INSTANCE (You can enter additional event names.)

Trigger Object: _____

Condition: _____

Processing Mode: Not in Enter-Query Mode

**Use WHEN-NEW-FORM-INSTANCE for visual changes
Such as establishing menu entries**



Top Ten Rule #3 – Menu Entries

- Menu action type only displays menu

Seq	Type	Description	Language	Enabled
10	Menu		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"/>

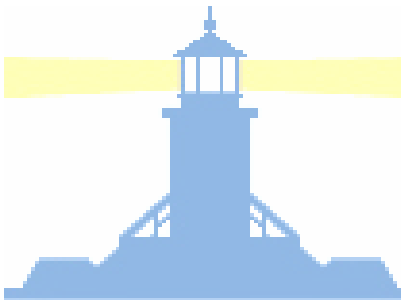
Menu Entry: MENU1
Menu Label: Display Invoice ID
 Render line before menu
Icon Name:
Enabled in Block(s):
Add Block...

Use add block button to choose blocks where this menu will be enabled or leave null for all blocks

File Edit View Folder Tools Reports Window Help

View EFT Details
View Invoice Overview
View Accounting Events
Display Invoice ID

Operating Unit	Customer Taxpayer ID	Type	PO Number	Requester	Trading Pa	Supplier Num	Supplier Site	Invoice D:
Vision Operations		Standard						



Top Ten Rule #3 – Menu Entries

- Step 2 – create the action for the menu entry

Form Personalizations (Invoices)

Function Name Form Name Debug Mode

Seq	Description	Level	Enabled
10	Prevent Employee from entering or updating invoice related to themselves	Form	<input checked="" type="checkbox"/>
20	Create menu for Invoice Id	Form	<input checked="" type="checkbox"/>
30	Create action for Menu 1 to display invoice id	Function	<input checked="" type="checkbox"/>
			<input type="checkbox"/>

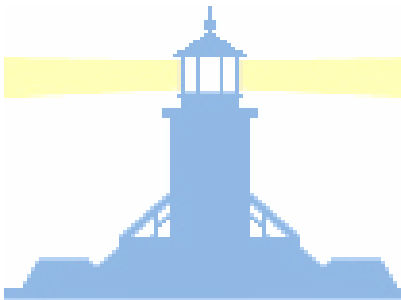
Condition Actions

Trigger Event (You can enter additional event names.)

Trigger Object

Condition

Processing Mode



Top Ten Rule #3 – Menu Entries

- Step 2 – create the action for the menu entry

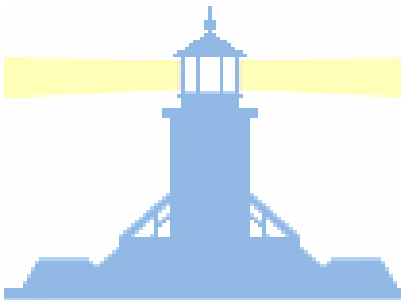
The screenshot shows the Oracle Form Personalizations (Invoices) window. The top section displays the Function Name as AP_APXINWKB and the Form Name as APXINWKB. Below this is a table of personalizations:

Seq	Description	Level	Enabled
10	Prevent Employee from entering or updating invoice related to themselves	Form	<input checked="" type="checkbox"/>
20	Create menu for Invoice Id	Form	<input checked="" type="checkbox"/>
30	Create action for Menu 1 to display invoice id	Function	<input checked="" type="checkbox"/>

The 'Actions' tab is active, showing a table of actions:

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

On the right side of the 'Actions' tab, the 'Message Type' is set to 'Show' and the 'Message Text' is '=Invoice Id: ||:INV_SUM_FOLDER.INVOICE_ID'. A 'Note' dialog box is open, displaying 'Invoice Id: 155960' and an 'OK' button. A red box highlights the 'Validate' button at the bottom right of the window. A callout box points to the 'Validate' button with the text: 'Use validate button to check sql fragment'.



Top Ten Rule #3 – Menu Entries

- Result

File Edit View Folder Tools Reports Window Help

View EFT Details
View Invoice Overview
View Accounting Events
Display Invoice ID

Invoice Workbench (P) Batch Control Tot Batch Actual Total

Sbehn

Operating Unit	Customer Taxpayer ID	Type	PO Number	Requester	Trading Pa	Supplier Num	Supplier Site	Invoice D:
Vision Operations		Standard		Behn, Susan D	Dell Comp	5092	DELL	01-NOV-2
Vision Operations		Standard			Dell Comp	5092	DELL	29-AUG-2
Vision Operations		Standard		Behn, Susan D	Dell Comp	5092	DELL	31-OCT-2
Vision Operations		Standard			Dell Comp	5092	DELL	10-NOV-2

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

Summary

Items 6,000.00

Retainage

Prepayments Applied

Amount Paid USD 0.00

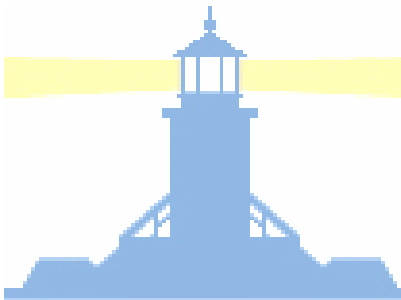
Status

Status Validated

Accounted Yes

Approval Initiated





Top Ten Rule #3 – Menu Entries

- Result

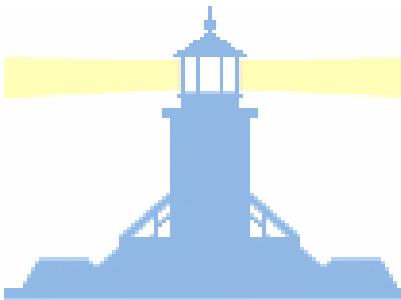
The screenshot shows the Oracle Invoice Workbench (Payables Manager) interface. At the top, there is a menu bar (File, Edit, View, Folder, Tools, Reports, Window, Help) and a toolbar with various icons. Below the menu bar, there are two input fields: "Batch Control Total" and "Batch Actual Total".

The main data area displays a table with the following columns: Operating Unit, Customer Taxpayer ID, Type, PO Number, Requester, Trading Pa, Supplier Num, Supplier Site, and Invoice D. The table contains four rows of data, all with "Vision Operations" as the Operating Unit and "Behn, Susan D" as the Requester. The Supplier Site for the first row is highlighted in yellow and is "DELL".

Below the table, there are several tabs: "1 General", "2 Lines", "3 Holds", "5 Scheduled Payments", and "6 View Prepayment Applications". The "1 General" tab is active, showing a "Summary" section with fields for "Items" (6,000.00), "Retainage", and "Prepayments Applied". There is also an "Amount Paid" section showing "USD 0.00".

A "Note" dialog box is open in the foreground, displaying "Invoice Id: 155960" and an "OK" button.





Top Ten Rule #4 – Masking Data

- Mask the tax id in 11/
 - Supplier form has moved to OA Framework in R12

Form Personalizations (Suppliers)

Function Name Form Name Debug Mode

Seq	Description	Level	Enabled
21	Activate more menus	Form	<input checked="" type="checkbox"/>
22	Show 'Inactive Date' in Supplier LOV	Form	<input checked="" type="checkbox"/>
23	Conceal the taxpayer id	Form	<input checked="" type="checkbox"/>
24	Prevent select of employee suppliers	Function	<input type="checkbox"/>

Condition Actions

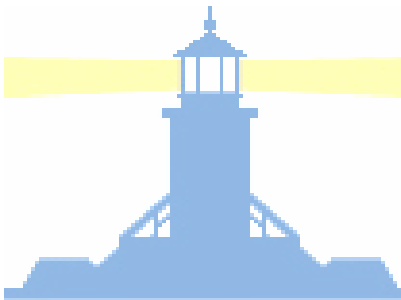
Trigger Event (You can enter additional event names.)

Trigger Object

Condition

Processing Mode

–Context



Top Ten Rule #4 – Masking Data

- CONCEAL_DATA = TRUE - replaces data with *
- DISPLAYED = FALSE – hides field completely

The screenshot shows the Oracle Form Personalizations (Suppliers) window. The Function Name is AP_APXVDMVD and the Form Name is APXVDMVD. The Debug Mode is Off. A list of personalizations is shown, with item 23 'Conceal the taxpayer id' selected. The 'Actions' tab is active, showing a table with one row: Seq 10, Type Property, Description Conceal Taxpayer id, Language All, and Enabled checked. A 'Select By Text...' dialog box is open, showing a search for '%Taxpayer%' and a list of results. The first result is 'Taxpayer ID (Find Suppliers)' with Type TEXT ITEM and Object Name VNDR_QF.NUM_1099. The second result is 'Taxpayer ID (Suppliers (Vision Operations: USD))' with Type TEXT ITEM and Object Name VNDR.NUM_1099_MIR. The 'Value' field is set to TRUE. A red box highlights the 'Select By Text...' button.

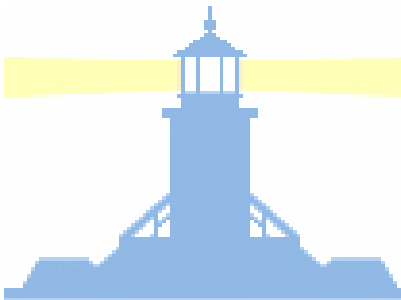
Seq	Description	Level	Enabled
21	Activate more menus	Form	<input checked="" type="checkbox"/>
22	Show 'Inactive Date' in Supplier LOV	Form	<input checked="" type="checkbox"/>
23	Conceal the taxpayer id	Form	<input checked="" type="checkbox"/>
24	Prevent select of employee suppliers	Function	<input type="checkbox"/>

Seq	Type	Description	Language	Enabled
10	Property	Conceal Taxpayer id	All	<input checked="" type="checkbox"/>

Text	Type	Object Name
Taxpayer ID (Find Suppliers)	TEXT ITEM	VNDR_QF.NUM_1099
Taxpayer ID (Suppliers (Vision Operations: USD))	TEXT ITEM	VNDR.NUM_1099_MIR

Don't need to know object name

Use Select By Text button to find correct object by prompt



Top Ten Rule #4 – Masking Data

- Result

The screenshot shows the Oracle Suppliers form for 'Maria del Pilar Ahumada' with Supplier Number 8050. The Taxpayer ID field is highlighted with a red box and contains masked characters (asterisks). The form includes tabs for General, Classification, Accounting, Control, Payment, Bank Acc..., EDI, Invoi..., Withh..., and Tax R... Below the tabs are fields for Parent Supplier Name, Number, and Customer Number.

Supplier Name	Maria del Pilar Ahumada	Supplier Number	8050
Alternate Name		Tax Registration Number	
Taxpayer ID	*****	[.]	
Parent Supplier Name		Number	
Customer Number			

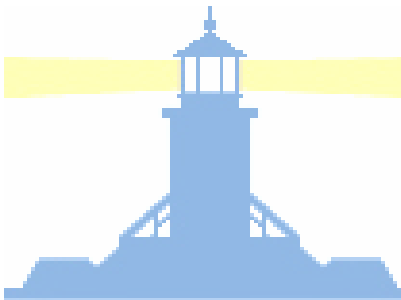
Top Ten Rule #5 – Changing LOVs

- Taxpayer ID is also on LOVs for find window

The screenshot shows the 'Find Suppliers' window with the following fields and values:

Supplier Name	Supplier Number	Taxpayer ID
Maria del Pilar Ahumada	8050	39686155

The 'Taxpayer ID' field in the search results table is highlighted with a red box.



Top Ten Rule #5 – Changing LOVs

- Create a new record group replacing tax id with end date

The screenshot shows the 'Form Personalizations (Suppliers)' window. At the top, 'Function Name' is 'AP_APXVDMVD' and 'Form Name' is 'APXVDMVD'. Below is a table of personalizations:

Seq	Description	Level	Enabled
15	View Payment History	Form	<input type="checkbox"/>
20	More menus	Form	<input checked="" type="checkbox"/>
21	Activate more menus	Form	<input checked="" type="checkbox"/>
22	Show 'Inactive Date' in Supplier LOV	Form	<input checked="" type="checkbox"/>

The 'Actions' tab is active, showing a table of actions:

Seq	Type	Description	Language	Enabled
10	Builtin	Create Group Name	All	<input checked="" type="checkbox"/>
12	Property	Assign group name	All	<input checked="" type="checkbox"/>

An 'Editor' dialog box is open, showing the following SQL query:

```
select vendor_name,  
segment1||'-'||to_char(end_date_active,'DD-MON-RRRR'),  
to_char(end_date_active,'DD-MON-RRRR') num_1099,  
vat_registration_num,  
vendor_id  
from po_vendors  
order by vendor_name asc
```

The 'Builtin Type' dropdown is set to 'Create Record Group from Query'. The 'Argument' field contains the same SQL query as in the editor. The 'Group Name' is 'XXXXX_QF_VENDORS_BY_NAME'. A callout points to the 'Builtin Type' dropdown with the text: 'Builtin available in 11i RUP4 or later'. Another callout points to the SQL query in the editor with the text: 'Must have the same number of fields as existing Record group'. At the bottom, there are buttons for 'OK', 'Cancel', 'Search', 'Insert 'Get' Expression...', 'Insert Item Value...', and 'Apply Now'.

Builtin available in 11i RUP4 or later

Must have the same number of fields as existing Record group

Top Ten Rule #5 – Changing LOVs

- Assign the new record group to the LOV used for Supplier name

Form Personalizations (Suppliers)

Function Name: AP_APXVDMVD Form Name: APXVDMVD Debug Mode: Off

Seq	Description	Level	Enabled
15	View Payment History	Form	<input type="checkbox"/>
20	More menus	Form	<input checked="" type="checkbox"/>
21	Activate more menus	Form	<input checked="" type="checkbox"/>
22	Show 'Inactive Date' in Supplier LOV	Form	<input type="checkbox"/>

Condition Actions

Seq	Type	Description	Language	Enabled
10	Builtin	Create Group Name	All	<input checked="" type="checkbox"/>
12	Property	Assign group name	All	<input checked="" type="checkbox"/>

Object Type: LOV

Target Object: QF_VENDORS_BY_NAME

Property Name: GROUP_NAME

Value: XXXXX_QF_VENDORS_BY_NAME

Get Value

Record group created in previous slide

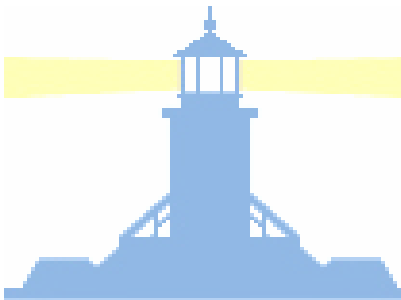
Top Ten Rule #5 – Changing LOVs

- Result

The screenshot shows a 'Find Suppliers' window with several input fields: Supplier Name, Alternate Name, Taxpayer ID, Supplier Number, and Tax Registration Number. A search window is open over the main window, showing a search for 'Maria del Pilar Ahumada%'. Below the search window, a table displays search results. The table has columns for Supplier Name, Number, Taxpayer ID, and Tax Registration Number. The first row shows 'Maria del Pilar Ahumada' in the Supplier Name column. The 'Taxpayer ID' column header and the first row's data in that column are highlighted with a red box.

- Additional steps

- Mask the tax id on the find window
- Replace the tax id with the end date for the supplier number LOV



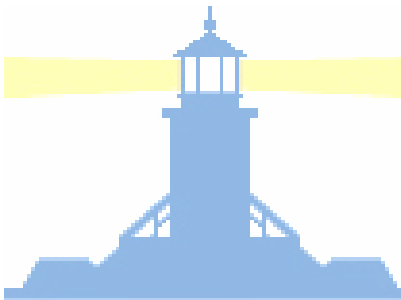
Forms Personalization – Other Frequently Used Built-ins

- Launch SRS Form – runs concurrent request
- Launch a Function – call another form
- Launch a URL
- DO_KEY
 - DO_KEY('NEXT_BLOCK') will force query execution for find window
- Execute a Procedure – use to execute any plsql code
- GO_ITEM, GO_BLOCK – change navigation
 - Use to prevent update to a field where navigation is needed to populate
- EXECUTE_TRIGGER
 - Execute form trigger, not database trigger
 - Use after setting default values to ensure internal code executes



Forms Personalization – Tips

- If you disable a tab page, you may need to disable items on the tab page
- 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 dependant on the results of another action
- Turn custom code off - Help → Diagnostics → Custom Code → Off

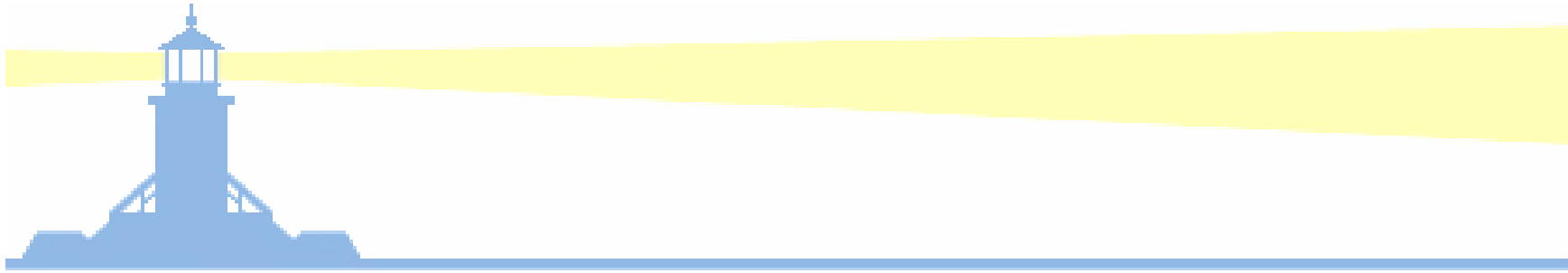


Forms Personalization Maintenance

- After upgrades, go to the personalization for each form and choose Tools → Validate All
- Tools → Administration will show personalized forms

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
OEXOEOORD	ONT_OEXOEOORD	Sales Orders	1
OEXOETEL	ONT_OEXOETEL	Quick Sales Orders	1



OA Framework Personalizations

Setup and Use
Examples 6 - 10



Setup – Profile Options – OA Framework Personalizations

- 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

OA Framework Personalizations

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

Personalize Table Layout: (TipTableLayout)

Indicates requisition with a pending change request.

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

Select requisition:

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	

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

About this Page Privacy Statement

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FND: Personalization Region Link Enabled = Yes

Personalize Self-Service Defn = Yes

FND: Diagnostics = Yes



Top Ten Rule #6 – Remove a button

- iExpenses - Remove Import Spreadsheet button

ORACLE Expense Reports

Close Window Preferences Global Policy **Personalize Page** Diagnostics

Expenses

Expenses Home | Expense Reports | Access Authorizations | Projects and Tasks | Payments Search

Expenses Home

Create Expense Report **Import Spreadsheet** Import Spreadsheet

Track Submitted Expense Reports

The following expense reports are either outstanding or have been paid in the last 30 days.

Report Number	Report Submit Date	Report Status	Last Report Status	Activity Current (Days)	Approver	Receipts Status	Report Total (USD)	Purpose	Duplicate	Withdraw	View Receipts
31-JAN-2008		Ready for Payment		1				Communication			

If the status is Pending Your Resolution, you were sent a notification explaining the required action.

Update Expense Reports

Click an Update icon to make changes to a saved, rejected, or returned expense report.

Report Number	Report Date	Status	Report Total (USD)	Purpose	Update	Duplicate
No results found.						

Notifications

View

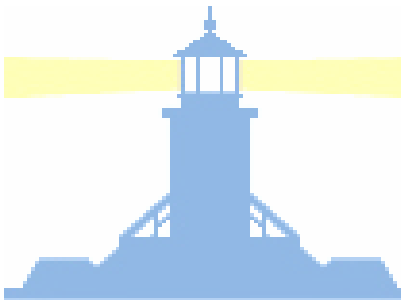
Select From

There are no notifications in this view.

- TIP [Vacation Rules](#) - Redirect or auto-respond to notifications.
- TIP [Worklist Access](#) - Specify which users can view and act upon your notifications.

Create Expense Report Import Spreadsheet Export Spreadsheet

Start with Personalize Page



Top Ten Rule #6 – Remove a button

- Biggest challenge – finding the item to personalize

- Simple View
- Complete View
- Expand All
- <ctrl> F
- Collapse All
- Focus

ORACLE Expense Reports

Close Window Preferences Help Contact Us Global Policy Personalize Page Diagnostics

Expenses

Personalize Page: Expenses Home

Choose Context Manage Levels

Personalization Context

Scope Page: Expenses Home
Document Name / oracle/apps/ap/oiw/webui/HomePG
Function OIE Home Page
Site Include
Organization Vision Operations
Responsibility iExpenses

Search

Style [dropdown]
Title/Prompt/Text [input]
 Include Personalized Items Only
Go

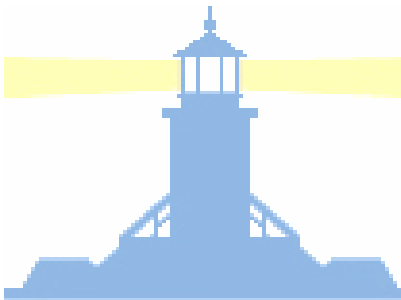
Personalization Structure

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: Expenses Home	Yes								
Corporate Branding									
Image: (corporateBranding)	Yes								
Header: Track Submitted Expense Reports	Yes								
Raw Text: (TrackReportsRN.TrackSubExpRepInstr)	Yes								



Top Ten Rule #6 – Remove a button

- 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			

Find [?] [X]

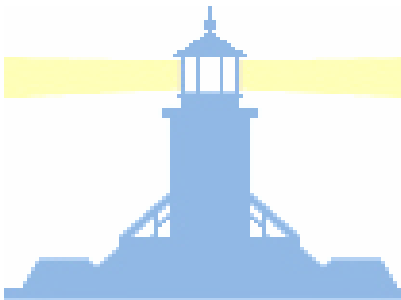
Find what:

Match whole word only

Direction: Up Down

Match case

Click pencil to edit



Top Ten Rule #6 – Remove a button

- Set rendered = false and click Apply button

Personalization Properties

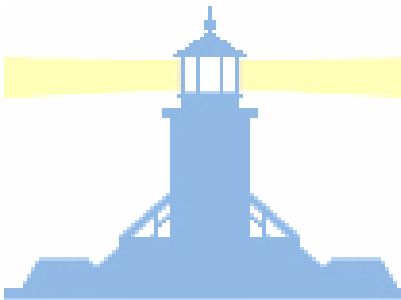
Clear Personalization

	Original Definition	Function: OIE Home Page Site	Organization: Vision Operations	Responsibility: iExpenses	Result / Source	
Access Key	Default	Inherit 5	Inherit 5	Inherit 5	Inherit 5	Default / Original Definition
Additional Text	Default	Inherit 5	Inherit 5	Inherit 5	Inherit 5	Default / Original Definition
Admin Personalization	true	Inherit 5	Inherit 5	Inherit 5	Inherit 5	true / Original Definition
CSS Class	Default	Inherit 5	Inherit 5	Inherit 5	Inherit 5	Default / Original Definition
Destination Function	Default	Inherit 5	Inherit 5	Inherit 5	Inherit 5	Default / Original Definition
Destination URI	OA.jsp?OAFunc=OIEIMPORTPAGE	Inherit 5	Inherit 5	Inherit 5	Inherit 5	OA.jsp?OAFunc=OIEIMPORTPAGE / Original Definition
Export View Attribute	Default	Inherit 5	Inherit 5	Inherit 5	Inherit 5	Default / Original Definition
Prompt	Import Spreadsheet	Inherit 5	Inherit 5	Inherit 5	Inherit 5	Import Spreadsheet / Original Definition
Rendered	true	Inherit 5	Inherit 5	Inherit 5	Inherit 5	true / Original Definition
Target Frame	Default	Inherit 5	Inherit 5	Inherit 5	Inherit 5	Default / Original Definition

Clear Personalization

Options for personalization change based on object type

✓ 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.



Top Ten Rule #6 – Remove a button results

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](#)

Page Layout: Expenses Home >

Focus Name	Shown User	Personalizable	Personalize	Reorder	Create	Item Update	Item Delete	Item Seeded	User Views	Show in Complete View
<input type="checkbox"/> Page Button Bar: (HomePageButtonsRN)	Yes									
Button: Create Expense Report	Yes									
Button: Import Spreadsheet										
Button: Export Spreadsheet	Yes									

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

ORACLE Expense Reports Close Window Preferences Global Policy Personalize Page Diagnostics

Expenses

[Expenses Home](#) | [Expense Reports](#) | [Access Authorizations](#) | [Projects and Tasks](#) | [Payments Search](#)

Expenses Home

[Create Expense Report](#) [Export Spreadsheet](#)

Button is gone

Track Submitted Expense Reports

The following expense reports are either outstanding or have been paid in the last 90 days.

Report Number	Report Submit Date	Report Status	Last Report Status	Activity Current (Days)	Approver	Receipts Status	Report Total (USD)	Purpose	Duplicate	Withdraw	View Expense Receipts
31-JAN-2008		Ready for Payment		1				Communication			View Expense Receipts





Personalization Levels / Inheritance

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

Top Ten Rule #7 – Change Prompts

- Change Job to Job Short Name
- Click the Personalize Page button and find the Job item using <ctrl> F

ORACLE® iProcurement

Shopping Cart Home Logout Preferences Help **Personalize Page** Diagnostics

Shop Requisitions Receiving Contractors

Stores | Shopping Lists | Non-Catalog Request | **Contractor Request**

Create Contractor Request

* Indicates required field

* Type Rate Based Temporary Labor

* Job

Require Candidate Screening

Cancel Continue

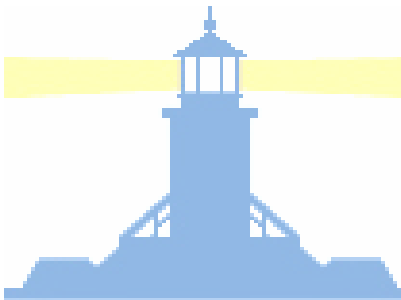
* Start Date 14-Feb-2008
(example: 28-Jan-2008)

End Date

* Requester Behn, Susan D

* Location HR- New York
[Enter one-time address](#)

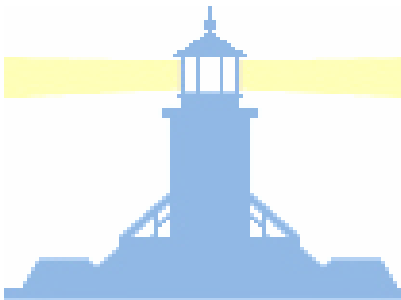
Shopping Cart
Your cart is empty.



Top Ten Rule #7 – Change Prompts

- Change Prompt at the desired level – in this case, site level

Personalization Properties					
Clear Personalization <input type="text"/> <input type="button" value="Go"/> <input type="button" value="Choose Levels Displayed"/>					
	Original Definition	Site	Organization: Vision Services	Responsibility: iProcurement, Vision Services (USA)	Result / Source
Access Key	Default	<input type="text" value="Inherit"/>	<input type="text" value="Inherit"/>	<input type="text" value="Inherit"/>	Default / Original Definition
Additional Text	Default	<input type="text" value="Inherit"/>	<input type="text" value="Inherit"/>	<input type="text" value="Inherit"/>	Default / Original Definition
Admin Personalization	true	<input type="text" value="Inherit"/>	<input type="text" value="Inherit"/>	<input type="text" value="Inherit"/>	true / Original Definition
CSS Class	OraFieldText	<input type="text" value="Inherit"/>	<input type="text" value="Inherit"/>	<input type="text" value="Inherit"/>	OraFieldText / Original Definition
Export View Attribute	Default	<input type="text" value="Inherit"/>	<input type="text" value="Inherit"/>	<input type="text" value="Inherit"/>	Default / Original Definition
Initial Value	Default	<input type="text" value="Inherit"/>	<input type="text" value="Inherit"/>	<input type="text" value="Inherit"/>	Default / Original Definition
Long Tip Region	Default	<input type="text" value="Inherit"/>	<input type="text" value="Inherit"/>	<input type="text" value="Inherit"/>	Default / Original Definition
Maximum Length	Default	<input type="text" value="Inherit"/>	<input type="text" value="Inherit"/>	<input type="text" value="Inherit"/>	Default / Original Definition
Prompt	Job	<input type="text" value="Job Short Name"/>	<input type="text" value="Inherit"/>	<input type="text" value="Inherit"/>	Job Short Name / Site
...	false	<input type="text" value="Inherit"/>	<input type="text" value="Inherit"/>	<input type="text" value="Inherit"/>	false / Original



Top Ten Rule #7 – Change Prompts

- Result – prompt changed

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help Personalize Page Diagnostics

Shop Requisitions Receiving Contractors

Stores | Shopping Lists | Non-Catalog Request | **Contractor Request**

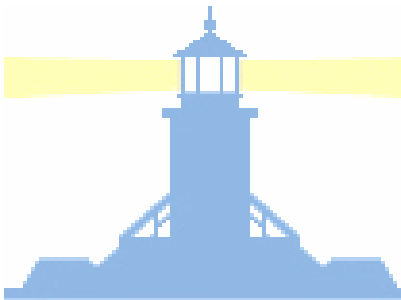
Create Contractor Request

* Indicates required field

* Type	Rate Based Temporary Labor		* Start Date	14-Feb-2008	
* Job Short Name	<input type="text"/>			(example: 28-Jan-2008)	
	<input type="checkbox"/> Require Candidate Screening		End Date	<input type="text"/>	
			* Requester	Behn, Susan D	
			* Location	HR- New York	

[Enter one-time address](#)

Shopping Cart
Your cart is empty.

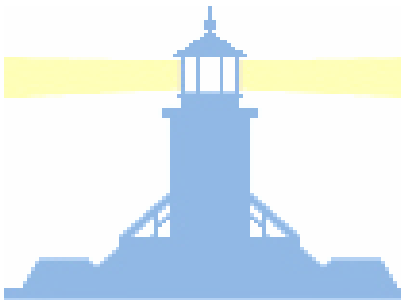


Top Ten Rule #8 – Hide/Reorder Columns in a table

- Hide the Duplicate column to prevent users from duplicating expense reports
 - Click the Personalize Page button

The screenshot shows the Oracle Expense Reports interface. At the top right, the 'Personalize Page' button is highlighted with a red box. Below the navigation bar, there are buttons for 'Create Expense Report' and 'Export Spreadsheet'. A table titled 'Track Submitted Expense Reports' is displayed, with a red box highlighting the 'Duplicate' column. The table contains one row of data for a report submitted on 31-JAN-2008.

Report Number	Report Submit Date	Report Status	Last Report Status	Activity Current (Days)	Approver	Receipts Status	Report Total (USD)	Purpose	Duplicate	Withdraw	View Expense Receipts
31-JAN-2008		Ready for Payment		1				Communication			

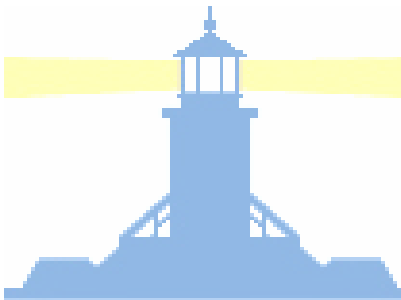


Top Ten Rule #8 – Hide/Reorder Columns in a table

- The button to duplicate is called a Switcher
 - Switchers allow users to “switch” to another function
- Finding tip
 - Look for other columns in the table
 - Report Total
 - Purpose

	Message Styled Text: Receipts Status	Yes	Yes	
	Message Styled Text: Report Total		Yes	
	Message Styled Text: Report Total	Yes	Yes	
	Message Styled Text: Purpose	Yes	Yes	
	<input type="checkbox"/> Switcher: Duplicate	Yes	Yes	

Click pencil to edit



Top Ten Rule #8 – Hide/Reorder Columns in a table

Personalization Properties

Clear Personalization [dropdown] Go Choose Levels Displayed

Original Definition Function: OIE Home Page Site Organization: Vision Operations Responsibility: iExpenses Result / Source

Admin Personalization	true	Inherit	5	Inherit	5	Inherit	5	Inherit	5	true / Original Definition	
CSS Class	Default	Inherit								Default / Original Definition	
Controller Class	Default	Inherit								Default / Original Definition	
Export View Attribute	Default	Inherit								Default / Original Definition	
Post Initial Values	false	Inherit							Inherit	5	false / Original Definition
Prompt	Duplicate	Inherit	5	Inherit	5	Inherit	5	Inherit	5	Duplicate / Original Definition	
Rendered	true	Inherit	5	Inherit	5	Inherit	5	Inherit	5	true / Original Definition	
Sort Allowed	no	Inherit	5	Inherit	5	Inherit	5	Inherit	5	no / Original Definition	
Sort By View Attribute	Default	false		SPEL		Inherit	5	Inherit	5	Default / Original Definition	
User Personalization	true	Inherit	5	Inherit	5	Inherit	5	Inherit	5	true / Original Definition	

Set Rendered = false

ORACLE Expense Reports

Close Window Preferences Global Policy Personalize Page Diagnostics

Expenses

Expenses Home | Expense Reports | Access Authorizations | Projects a

Expenses Home

Create Expense Report Export Spreadsheet

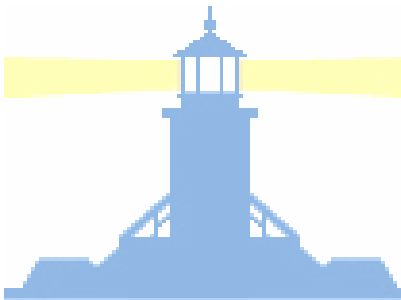
Track Submitted Expense Reports

The following expense reports are either outstanding or have been paid in the last 30 days.

Report Number	Report Submit Date	Report Status	Last Report Status (Days)	Activity Current Approver	Receipts Status	Report Total (USD)	Purpose	Withdraw	View Expense Receipts
31-JAN-2008		Ready for Payment		1			Communication		

Duplicate column is gone





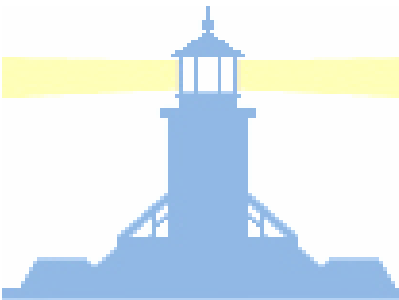
Top Ten Rule #8 – Hide/Reorder Columns in a table

- Find the table to reorder table columns
 - Turn on region links to find tables easier

Page Layout: Expenses Home > Header: Track Submitted Expense Reports >

Focus Name	Shown	User Personalizable	Personalize	Reorder	Create	Item Update	Item Delete	Item Seeded	User Views	Show in Complete View
[-] Table: Track Submitted E...	Yes									
Message Styled Text: Name		Yes								
[+] Switcher: Report Number	Yes	Yes								
Message Styled Text: Report Date		Yes								
Message Styled Text: Report Submit Date	Yes	Yes								
[+] Switcher: Report Status	Yes									
Message Styled Text: Last Report Status Activity (Days)	Yes	Yes								
Message Styled Text: Current Approver	Yes	Yes								
[+] Switcher: Current Approver										
Message Styled Text: Receipts Status	Yes	Yes								
Message Styled Text: Report Total		Yes								
Message Styled Text: Report Total	Yes	Yes								
Message Styled Text: Purpose	Yes	Yes								
[+] Switcher: Duplicate	Yes	Yes								
[+] Switcher: Withdraw	Yes	Yes								
Image: View Expense Receipts	Yes									

Click the reorder icon at the table level

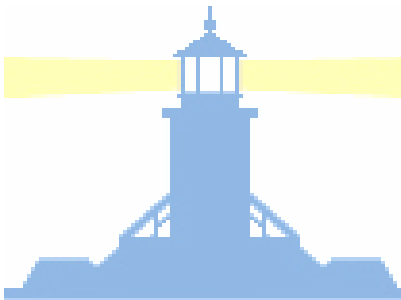


Top Ten Rule #8 – Hide/Reorder Columns in a table

- Check personalization level
- Use arrows to move fields up or down

The screenshot shows the 'Reorder Contents' dialog box. It is divided into several sections:

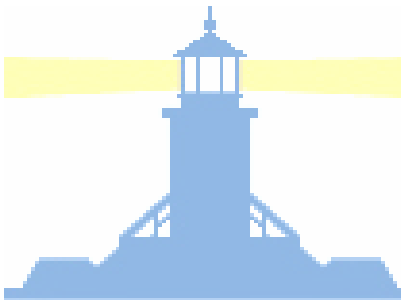
- Original Definition:** A list of fields including Name, Report Number, Report Date, Report Submit Date, Report Status, Last Report Status Activity (Days), Current Approver, Receipts Status, Report Total, Purpose, and two SQL queries.
- Function:** A section with a red border containing a checked 'Personalize' checkbox and a list of the same fields as the 'Original Definition' section. To the right of this list are four arrows: two pointing up and two pointing down, also enclosed in a red box.
- Site:** A section with an unchecked 'Personalize' checkbox and an 'Inherit Order' list with four arrows (two up, two down) to its right.
- Organization, Responsibility, and Site (bottom):** Each of these sections has an unchecked 'Personalize' checkbox and an 'Inherit Order' list with two arrows (one up, one down) to its right.



Top Ten Rule #9 – Set Initial Values

- Set the initial value for the Purpose

The screenshot shows the Oracle Expense Reports interface. At the top, there is a navigation bar with 'ORACLE Expense Reports' on the left and 'Close Window', 'Preferences', 'Global Policy', 'Personalize Page', and 'Diagnostics' on the right. Below this is a breadcrumb trail: 'Expenses Home | Expense Reports | Access Authorizations | Projects and Tasks | Payments Search'. The main content area is titled 'Create Expense Report: General Information' and includes a progress indicator with three steps: 'General Information', 'Cash and Other Expenses', and 'Review'. The form contains several fields: 'Name' (Behn, Susan D (1878)), '* Department' (empty), 'Reimbursement Currency' (USD - US dollar), 'Expense Template' (Travel), 'Purpose' (empty, highlighted with a red box), and '* Approver' (Stock, Ms. Pat). There are 'Save' and 'Cancel' buttons and a 'Step 1 of 3' indicator with a 'Next' button at the bottom right of the form.



Top Ten Rule #9 – Set Initial Values

- Set the initial value
 - In this case, the value is set at the responsibility level

Personalization Properties						
Clear Personalization <input type="text"/> <input type="button" value="Go"/> <input type="button" value="Choose Levels Displayed"/>						
	Original Definition	Function: OIE Expenses Entry Flow	Site	Organization: Vision Operations	Responsibility: iExpenses	Result / Source
Access Key	Default	Inherit 5	Inherit 5	Inherit 5	Inherit 5	Default / Original Definition
Additional Text	Default	Inherit 5	Inherit 5	Inherit 5	Inherit 5	Default / Original Definition
Admin Personalization	true	Inherit 5	Inherit 5	Inherit 5	Inherit 5	true / Original Definition
CSS Class	OraFieldText	Inherit 5	Inherit 5	Inherit 5	Inherit 5	OraFieldText / Original Definition
Destination Function	Default	Inherit 5	Inherit 5	Inherit 5	Inherit 5	Default / Original Definition
Export View Attribute	Default	Inherit 5	Inherit 5	Inherit 5	Inherit 5	Default / Original Definition
Initial Value	Default	Internal Expenses 5	Inherit 5	Inherit 5	Inherit 5	Internal Expenses / Function
Long Tip Region	Default	Inherit 5	Inherit 5	Inherit 5	Inherit 5	Default / Original Definition

Top Ten Rule #10 – Add a field

- Add a required Buyer field and include an LOV for buyer names to contractor request page

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help Personalize Page Diagnostics

Shop Requisitions Receiving **Contractors**

Stores Shopping Lists Non-Catalog Request Contractor Request

Create Contractor Request

* Indicates required field

* Type Rate Based Temporary Labor

* Job Short Name

Require Candidate Screening

* Start Date 14-Feb-2008

End Date

* Requester Behn, Susan D

* Location HR- New York

Enter one-time address

Cancel Continue

Shopping Cart
Your cart is empty.

Job Details

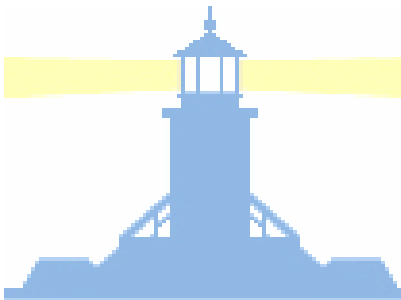
* Contact Information

Go to about this page to see if buyer field exists

About this Page Privacy Statement

Shop Requisitions Receiving Contractors Shopping Cart Home Logout Preferences Help Personalize Page Diagnostics

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Top Ten Rule #10 – Add a field

- Scroll down to find the view object

ORACLE iProcurement

Shopping Cart Home Logout Preferences Personalize Page Diagnostics

Shop: Contractor Request >

About Page: Create Contractor Request

Printable Page Generate Bug Report

Page Personalization Page Context Technology Components Java System Properties Profiles Patches

/oracle/apps/ixx/por/req/webui/ContractorRequestPG 120.2

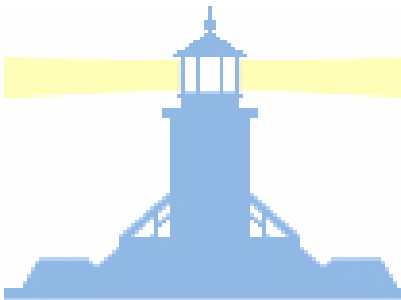
Page Definition

Expand All Collapse All

Focus Name	Controller	Application Module	View Object	View Attribute
pageLayout: Oracle iProcurement: Contractor Request	ContractorRequestCO	RequisitionAM		
stackLayout				
messageStyledText: You cannot access this page because Ora...				
messageStyledText: You cannot access this page because the...				
spacer: (spacer)				
tableLayout: (ContractorRequestTableLayout)				
rowLayout				
cellFormat: (JobInfoCellFormat)				
labeledFieldLayout: (JobInfo)				
messageRadioGroup: Type			PoRequisitionLinesVO	LineTypeId
messageLovInput: Job Short Name			PoRequisitionLinesVO	Job

Expand All

Look for view object (ends with VO) hyperlinks
Click on PoRequisitionLinesVO
This name will be needed later



Top Ten Rule #10 – Add a field

- The suggested buyer id is available for this page

```

Select a view object oracle.apps.icx.por.req.server.PoRequisitionLinesVO [v] Get Details
View Object Details
Substitute
Version PoRequisitionLinesVOImpl.java 120.2 PoRequisitionLinesVORowImpl.java 120.10
Query
SELECT PoRequisitionLineEO.REQUISITION_LINE_ID, PoRequisitionLineEO.REQUISITION_LI
PoRequisitionLineEO.LINE_NUM, PoRequisitionLineEO.LAST_UPDATE_DATE, PoRequisitio
PoRequisitionLineEO.LAST_UPDATE_LOGIN, PoRequisitionLineEO.CREATION_DATE, PoRe
PoRequisitionLineEO.DELIVER_TO_LOCATION_ID, PoRequisitionLineEO.TO_PERSON_ID,
PoRequisitionLineEO.ITEM_DESCRIPTION, PoRequisitionLineEO.CATEGORY_ID,
PoRequisitionLineEO.UNIT_MEAS_LOOKUP_CODE, PoRequisitionLineEO.UNIT_PRICE, PoR
PoRequisitionLineEO.LINE_TYPE_ID, PoRequisitionLineEO.SOURCE_TYPE_CODE, PoRequi
PoRequisitionLineEO.ITEM_REVISION, PoRequisitionLineEO.QUANTITY_DELIVERED,
PoRequisitionLineEO.SUGGESTED_BUYER_ID, PoRequisitionLineEO.ENCUMBERED_FLAG,
PoRequisitionLineEO.RFQ_REQUIRED_FLAG, PoRequisitionLineEO.NEED_BY_DATE,
  
```

Database query for page
Good info for troubleshooting

- An LOV will translate buyer id to buyer name

SuggestedBuyerId	oracle.jbo.domain.Number
SuggestedBuyer	java.lang.String

Scroll down more to find available view attributes

Top Ten Rule #10 – Add a field

- LOV for suggested buyer is on the checkout page – need to retrieve for request page
 - Note: If LOV not available, create in JDeveloper

ORACLE iProcurement

Shopping Cart Home Logout Preferences Personalize Page Diagnostics

Shop Requisitions Receiving Contractors

Requisition Information Approvals Review And Submit

Checkout: Requisition Information

* Indicates required field

Cancel Save Submit Edit Lines Step 1 of 2 Next

* Requisition Description: New Computer

Delivery

Urgent

* Need-By Date: 14-Feb-2008 00:00:00
(example: 28-Jan-2008 19:45:00)

* Requester: Behn, Susan D

* Deliver-To Location: HR- New York
[Enter one-time address](#)

Deliver to Maintenance

Suggested Buyer

Billing

Project

Task

Expenditure Type

Expenditure Organization

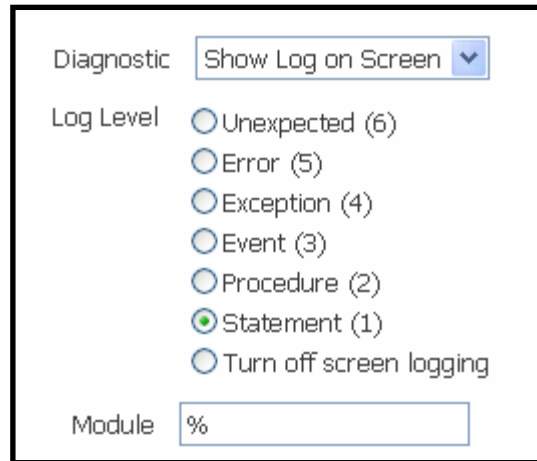
Expenditure Item Date
(example: 28-Jan-2008)

To find the LOV, choose Diagnostics



Top Ten Rule #10 – Add a field

- Finding the LOV
 - Choose Show Log on Screen with Statement (1) log level

A screenshot of a diagnostic log configuration window. The window has a white background and a black border. It contains the following elements:

- Diagnostic:** A dropdown menu with the text "Show Log on Screen" and a downward arrow.
- Log Level:** A list of radio button options:
 - Unexpected (6)
 - Error (5)
 - Exception (4)
 - Event (3)
 - Procedure (2)
 - Statement (1)
 - Turn off screen logging
- Module:** A text input field containing the character "%".

- Navigate back to the checkout screen and click on the LOV



Top Ten Rule #10 – Add a field

- Scroll down to see the diagnostics
- LOV path for suggested buyer is shown below

Request Parameters

```
amUsageMode=1
baseAppMod=oracle.apps.icx.por.req.server.RequisitionAM
searchText=
region=/oracle/apps/icx/lov/webui/BuyerLovRN
Criteria=SuggestedBuyer.BuyerName
baseCompMode=11.5.10
contextURI=/OA_HTML
_ti=2086787561
oapc=29
lovMainCriteria=BuyerName
addBreadcrumb=S
fndOAJSPinEmbeddedMode=y
enc=UTF-8
formName=DefaultFormName
regionAppId=178
retainAM=Y
Selector=N
lovBaseItemName=SuggestedBuyer
baseToLovKey=/oracle/apps/icx/por/req/webui/CheckoutSummaryPG.SuggestedBuyer_/oracle/apps/icx/lov/webui/BuyerLovRN
lovMultiSelectDelimiter=;
label=Suggested Buyer
```

Look for the Suggested Buyer item. Next line defines LOV.

This path will be needed later

Top Ten Rule #10 – Add a field

- Now add the field - click the Personalize Page button
- Find the table layout and click create item icon

Personalization Context

Scope Page: Oracle iProcurement: Contractor Request
Document Name /oracle/apps/icx/por/req/webui/ContractorRequestPG
Site Include
Organization Vision Services
Responsibility iProcurement, Vision Services (USA)

Search

Style
Title/Prompt/Text
 Include Personalized Items Only
Go

Personalization Structure

Simple View Complete View
[Expand All](#) | [Collapse All](#)

Page Layout: Oracle iProcurement: Contractor Request >

Focus Name	User Shown	Personalizable	Personalize	Reorder	Create Item	Update Item	Seeded User Views
[-] Table Layout: (ContractorRequestTableLayout)	Yes						
[-] Row Layout	Yes						
[-] Cell Format: (JobInfoCellFormat)	Yes						
[-] Labeled Field Layout: (JobInfo)	Yes						

Click create item icon

Top Ten Rule #10 – Add a field

- Enter the following values

The screenshot shows the Oracle iProcurement 'Create Item' form. The 'Item Style' dropdown is set to 'Message Lov Input'. The 'Property *Value' table is populated with the following data:

Property	*Value
* ID	SuggestedBuyer
Access Key	
Additional Text	
Admin Personalization	true
Attribute Set	
CSS Class	
Comments	
Data Type	VARCHAR2
Disable Validation	false
Disabled	false
Export View Attribute	
External LOV	/oracle/apps/icx/lov/webui/BuyerLovRN

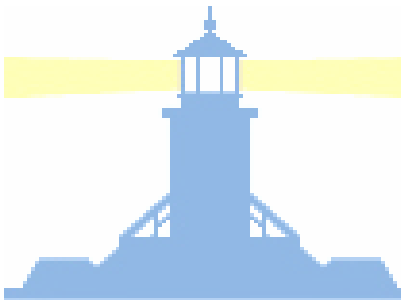
Callouts from the image:

- Callout 1: Select Message Lov Input to make this a LOV validated field (points to the Item Style dropdown).
- Callout 2: Enter any unique name (points to the * ID field).
- Callout 3: LOV Path from slide 63 (points to the External LOV field).

Select Message Lov Input to make this a LOV validated field

Enter any unique name

LOV Path from slide 63



Top Ten Rule #10 – Add a field

- Scroll down and continue entering the following

Prompt	Buyer
Read Only	false
Rendered	true
Required	no
Scope	.
Search Allowed	false
Selective Search Criteria	false
Sort Allowed	no
Sort By View Attribute	
Tip Message Name	
Tip Type	none
User Personalization	false
Vertical Aligment	middle
View Attribute	SuggestedBuyer
View Instance	PoRequisitionLinesVO
Warn About Changes	true
showRequired	false

Enter Prompt

Enter View Attribute from slide 60

Enter View Object from slide 59

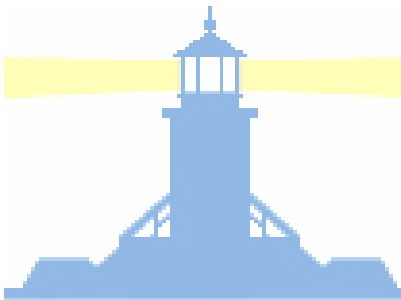


Top Ten Rule #10 – Add a field

- The Suggested Buyor item is created, but the LOV must be mapped

Click on the mapping icon

	Message Lov Input: Buyer	Yes			
	lovMappings				



Top Ten Rule #10 – Add a field

- Create LOV Mappings for Buyer Name and Buyer Id

Create Item
* Indicates required field

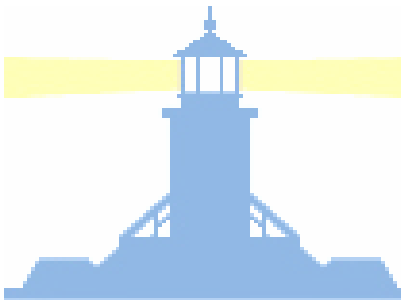
Level
Item Style

Property	*Value
* ID	xxBuyerMap
Attribute Set	
Comments	
Criteria Item	SuggestedBuyer
Extends	
* LOV Region Item	BuyerName
Programmatic Query	false <input type="button" value="v"/>
Required	false <input type="button" value="v"/>
Return Item	SuggestedBuyer
Scope	.
Use for Validation	default <input type="button" value="v"/>

Create Item
* Indicates required field

Level
Item Style

Property	*Value
* ID	FormBuyerMap
Attribute Set	
Comments	
Criteria Item	SuggestedBuyer
Extends	
* LOV Region Item	BuyerId
Programmatic Query	false <input type="button" value="v"/>
Required	false <input type="button" value="v"/>
Return Item	SuggestedBuyer
Scope	.
Use for Validation	default <input type="button" value="v"/>



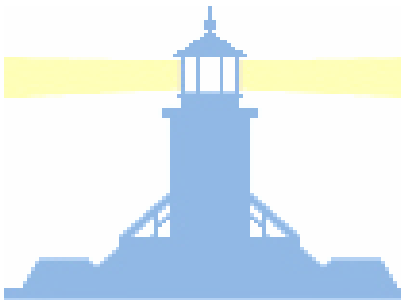
Top Ten Rule #10 – Add a field

- Click the create icon again shown on slide 64
- Create a Form Value to store the Buyer Id

Create Item
* Indicates required field

Level
Item Style

Property	*Value
* ID	SuggestedBuyerId
Admin Personalization	true <input type="button" value="v"/>
Attribute Set	
Comments	
Data Type	NUMBER <input type="button" value="v"/>
Encrypt	false <input type="button" value="v"/>
Extends	
Prompt	Form Buyer Id
Rendered	true <input type="button" value="v"/>
Scope	.
Search Allowed	false <input type="button" value="v"/>
Security Mode	standard <input type="button" value="v"/>
Selective Search Criteria	false <input type="button" value="v"/>
User Personalization	false <input type="button" value="v"/>
View Attribute	SuggestedBuyerId
View Instance	PORequisitionLinesVO



Top Ten Rule #10 – Add a field

- Result – Buyer with associated LOV

The screenshot shows the Oracle iProcurement interface. The main page is titled 'ORACLE iProcurement' and has navigation tabs for 'Shop', 'Requisitions', 'Receiving', and 'Contractors'. The 'Create Contractor Request' form is visible, with fields for 'Type' (Rate Based Temporary Labor), 'Job Short Name', and 'Buyer'. The 'Buyer' field is highlighted with a red box. A search window titled 'Search and Select: Buyer' is open over the 'Buyer' field. The search window shows search criteria (Last Name, Stock%) and a 'Go' button. Below the search criteria, there is a 'Results' table with columns for 'Quick Select', 'Last Name', 'First Name', 'Email', and 'Location'. The table contains two rows of results.

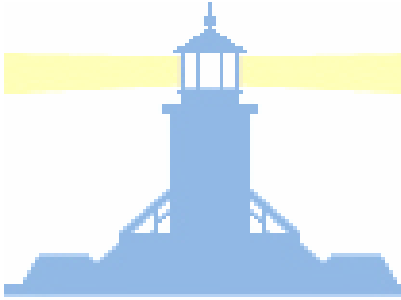
Quick Select	Last Name	First Name	Email	Location
<input type="radio"/>	Stock	Pat	pstock@vision.com	V1- New York City
<input type="radio"/>	Stockman	Pat	pstockman@visionu.edu	Vision University





Top Ten Rule #10 – Add Items

- Other Items that can be added
 - Buttons
 - Text and Images
 - Messages (Data Fields) of many styles
 - Tips
 - Raw Text



Customizations and Personalizations

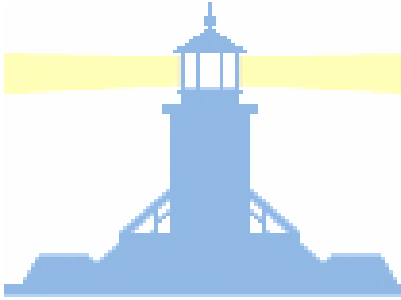
WARNING

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!

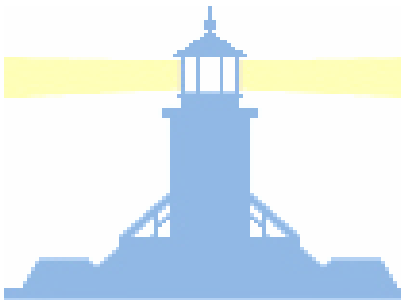
TEST! TEST! TEST! TEST! TEST!



Customizations and Personalizations

...THEN TEST IT AGAIN!


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



Migration to Other Instances

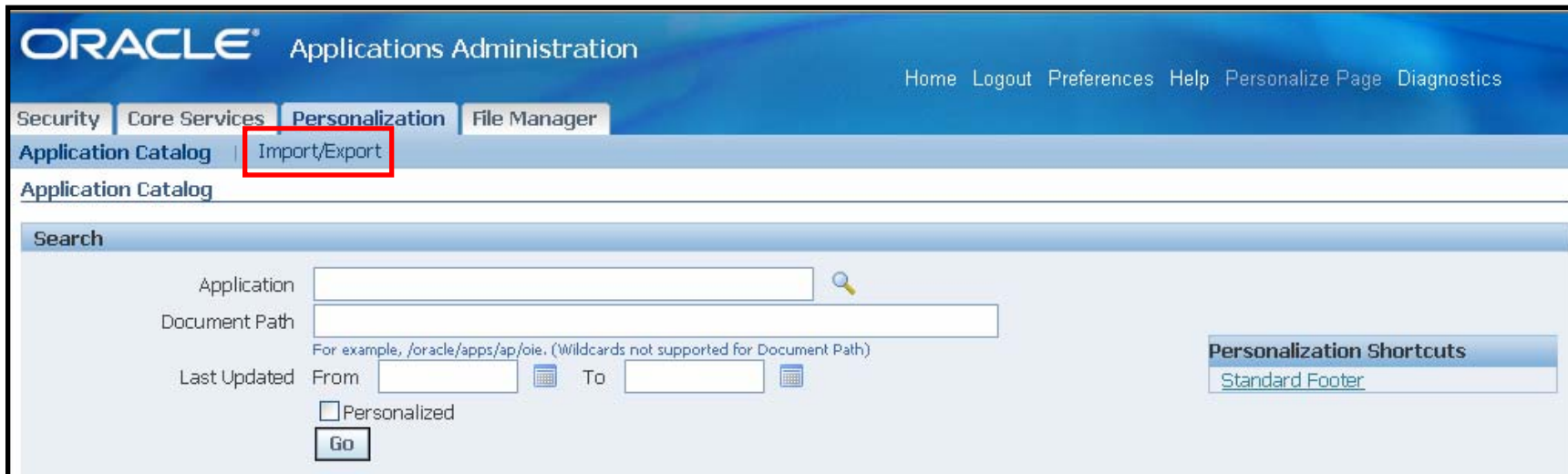
Forms Personalizations

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



Migration to Other Instances OA Framework 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 shows the Oracle Applications Administration interface. The top navigation bar includes 'ORACLE Applications Administration' and links for 'Home', 'Logout', 'Preferences', 'Help', 'Personalize Page', and 'Diagnostics'. Below this is a menu with 'Security', 'Core Services', 'Personalization', and 'File Manager'. The 'Personalization' menu is expanded, showing 'Application Catalog' and 'Import/Export', with 'Import/Export' highlighted by a red box. The main content area is titled 'Application Catalog' and contains a search section with fields for 'Application', 'Document Path', and 'Last Updated'. The 'Document Path' field has a note: 'For example, /oracle/apps/ap/oi. (Wildcards not supported for Document Path)'. There are also 'From' and 'To' date pickers, a 'Personalized' checkbox, and a 'Go' button. On the right side, there is a 'Personalization Shortcuts' section with a 'Standard Footer' link.



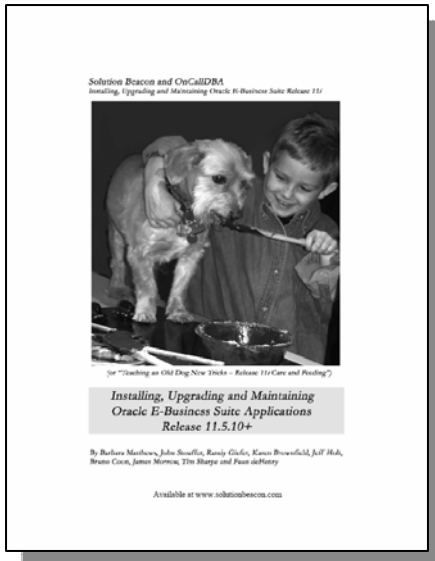
References

- 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
- MetaLink note 279034.1 – Forms Personalization

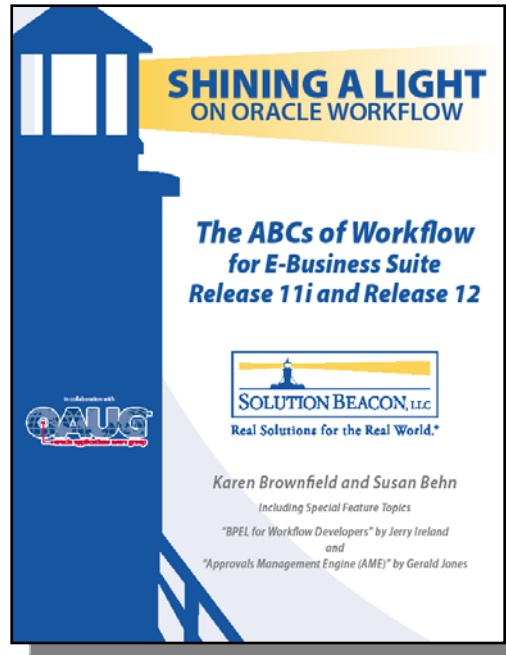


Available at
www.solutionbeacon.com

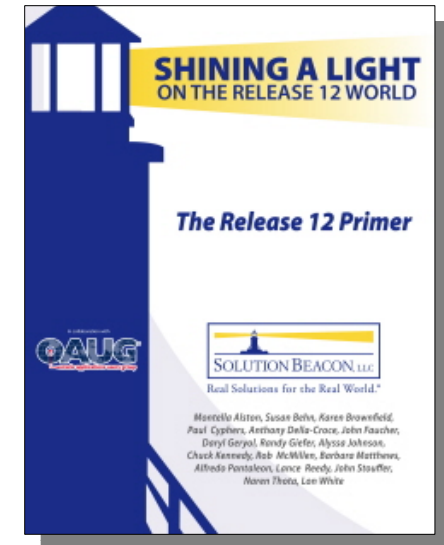
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The ABCs of Workflow for Oracle
E-Business Suite Release 11i and
Release 12



The Release 12 Primer –
Shining a Light on the
Release 12 World





Questions and Answers

Thank You!

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