Ten New Forms and OAF Personalization Examples for R12.1

Presented By
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VP, Oracle Practice
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

1 – 100 Reusable

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
Condition Tab

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

- WHEN-NEW-FORM-INSTANCE
- 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)

- **MENUn**
  - 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

![Condition Tab Diagram](image-url)
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.
Property Actions

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

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

- Validate "Value" entry; If sql – will run sql statement

- Displays form field property using SPEL (Simplest Possible Expression Language)

- Display item block.field

- Attempts to execute action
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

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

Prompts are different for each action type
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
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

Select by Text allows you to select item by prompt name

Enter prompt to search for correct item
Example 1 – Change Prompt

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

Select Property to change and enter Value

Gets existing value for property selected
Example 1 – Change Prompt

- Click Apply Now

Apply Now Button will activate rule
Example 1 – Change Prompt

- Rule has been applied
Example 1 – Change Prompt

- Property names are different for each object type

<table>
<thead>
<tr>
<th>Item</th>
<th>Radio Button</th>
</tr>
</thead>
<tbody>
<tr>
<td>CASE_RESTRICTION</td>
<td>ENABLED</td>
</tr>
<tr>
<td>CONCEAL_DATA</td>
<td>LABEL</td>
</tr>
<tr>
<td>DISPLAYED</td>
<td>PROMPT</td>
</tr>
<tr>
<td>ENTERABLE</td>
<td>VISIBLE</td>
</tr>
<tr>
<td>FORMAT_MASK</td>
<td>WIDTH</td>
</tr>
<tr>
<td>HINT_TEXT</td>
<td>X_POS</td>
</tr>
<tr>
<td>INITIAL_VALUE</td>
<td>Y_POS</td>
</tr>
<tr>
<td>LABEL</td>
<td></td>
</tr>
<tr>
<td>NAVIGABLE</td>
<td></td>
</tr>
<tr>
<td>PROMPT</td>
<td></td>
</tr>
<tr>
<td>REQUIRED</td>
<td></td>
</tr>
<tr>
<td>UPDATE_ALLOWED</td>
<td></td>
</tr>
<tr>
<td>VALUE</td>
<td></td>
</tr>
<tr>
<td>X_POS</td>
<td></td>
</tr>
<tr>
<td>Y_POS</td>
<td></td>
</tr>
</tbody>
</table>
Example 1 – Change Prompt

- Property names are different for each object type

<table>
<thead>
<tr>
<th>BLOCK</th>
<th>LOV</th>
<th>GLOBAL VARIABLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>• DEFAULT_WHERE</td>
<td>• AUTO_REFRESH</td>
<td>• INITIAL_VALUE</td>
</tr>
<tr>
<td>• DELETE_ALLOWED</td>
<td>• GROUP_NAME</td>
<td>• VALUE</td>
</tr>
<tr>
<td>• INSERT_ALLOWED</td>
<td>• HEIGHT</td>
<td></td>
</tr>
<tr>
<td>• NEXT_NAVIGATION_BLOCK</td>
<td>• TITLE</td>
<td></td>
</tr>
<tr>
<td>• ORDER_BY</td>
<td>• WIDTH</td>
<td></td>
</tr>
<tr>
<td>• PREVIOUS_NAVIGATION_BLOCK</td>
<td>• X_POS</td>
<td></td>
</tr>
<tr>
<td>• QUERY_ALLOWED</td>
<td>• Y_POS</td>
<td></td>
</tr>
<tr>
<td>• UPDATE_ALLOWED</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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
Example 2 – Display Message

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

Condition is checked when the user accesses the supplier name field.

Rule is executed if PO number is null.
Example 2 – Display Message

- **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

![Condition and Actions](image)

**Action type** = message
Example 2 – Display Message

- Result
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, Built-in

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

This was the previous rule
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

```
=select *AHP=POS_HT_SP_HP&OASF=POS_HT_SP_B_SUPP&OAPB=AP_PAY_PRODUCTION_T_BRAND'"&supplier_id='1"$item.inv_sum_folder.vendor_id.value) from dual
```

Action type = Builtin
Example #3 – Menus, Builtins

• 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, Built-in

- New menu item is on tools menu
Example #3 – Menus, Built-in

- Result
  - Supplier has already been retrieved
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

```
BEGIN xxmyinc_pers_wfl("||item.inv_sum_folder.invoice_id.value||");
END;
```

Follow the syntax exactly. All the single quotes are a little tricky.
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
Example #5 – GO_ITEM

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

<table>
<thead>
<tr>
<th>Seq</th>
<th>Type</th>
<th>Description</th>
<th>Language</th>
<th>Enabled</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>Property</td>
<td>Default to sysdate</td>
<td>All</td>
<td></td>
</tr>
</tbody>
</table>

**Actions**

- **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**

**Buttons**

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

<table>
<thead>
<tr>
<th>Seq</th>
<th>Type</th>
<th>Description</th>
<th>Language</th>
<th>Enabled</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>Property</td>
<td>Default to sysdate</td>
<td>All</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Builtin</td>
<td>Lock Cleared Date</td>
<td>All</td>
<td></td>
</tr>
</tbody>
</table>

- Builtin Type: GO_ITEM
- Argument: AVAILABLE.VALUE_DATE_DSP
Example #5 – GO_ITEM

- Result – Cleared date is always defaulted to current date
Other Bultins

- 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

- **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

### Find Personalized Forms Table

<table>
<thead>
<tr>
<th>Form</th>
<th>Function</th>
<th>User Function Name</th>
<th>Enabled Rules</th>
</tr>
</thead>
<tbody>
<tr>
<td>APXINWKB</td>
<td>AP_APXINWKB</td>
<td>Invoices</td>
<td>3</td>
</tr>
<tr>
<td>ASTRCALL</td>
<td>AST_RC_ALL</td>
<td>eBusiness Center</td>
<td>2</td>
</tr>
<tr>
<td>CSCCCRC</td>
<td>CSCCCRC</td>
<td>Contact Center</td>
<td>1</td>
</tr>
<tr>
<td>CSXSRSR</td>
<td>CSXSRSR</td>
<td>Create Service Requests</td>
<td>9</td>
</tr>
<tr>
<td>CSXSRSR</td>
<td>CSXSRSR</td>
<td>Find Service Requests</td>
<td>8</td>
</tr>
<tr>
<td>GLXIQFUN</td>
<td>GLXIQFUN</td>
<td>Funds Available Inquiry</td>
<td>3</td>
</tr>
<tr>
<td>GLXEJEENT</td>
<td>GLXEJEENT_A</td>
<td>Enter Journals</td>
<td>1</td>
</tr>
<tr>
<td>OEXOEORD</td>
<td>OEXOEORDER</td>
<td>Sales Orders</td>
<td>1</td>
</tr>
<tr>
<td>OEXOETEL</td>
<td>OEXOETEL</td>
<td>Quick Sales Orders</td>
<td>1</td>
</tr>
</tbody>
</table>
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

FND: Personalization Region Link Enabled = Yes

FND: Diagnostics = Yes

Personalize Self-Service Defn = Yes
Finding Object to Personalize

- Biggest challenge
- Search
- Simple View
- Complete View
- Expand All
- <ctrl> F
- Collapse All
- Focus
Finding Object to Personalize

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

<table>
<thead>
<tr>
<th>Message Styled Text: End Date</th>
<th>Yes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message Styled Text: End Date</td>
<td>Yes</td>
</tr>
<tr>
<td>Message Styled Text: End Date</td>
<td>Yes</td>
</tr>
<tr>
<td>Tip: (WFWorks)</td>
<td>Yes</td>
</tr>
<tr>
<td>Tip: (WFWorks)</td>
<td>Yes</td>
</tr>
<tr>
<td>Page Button Button:</td>
<td>Yes</td>
</tr>
<tr>
<td>Button: Create Expense Report</td>
<td>Yes</td>
</tr>
<tr>
<td>Button: Import Spreadsheet</td>
<td>Yes</td>
</tr>
<tr>
<td>Button: Export Spreadsheet</td>
<td>Yes</td>
</tr>
</tbody>
</table>

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”
Example 6 – Remove link

- Use `<ctrl>` F to search for “Access”
- Click the pencil
Example 6 – Remove link

- Set Rendered to “false” at the responsibility level.
Example 6 – Remove link

- Click “Return to Application”
Example 6 – Remove link

- Link is removed
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.
Example 7 – Privacy Statement
Example 7 – Privacy Statement

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

Scope: OA Footer

Function
Supplier: Buyer View: Supplier Search Page

Industry

Location

Site
Include

Organization
Vision Operations

Responsibility
Payables, Vision Operations (USA)
Example 7 – Privacy Statement
Example 7 – Privacy Statement

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

Make sure "Rendered" is true
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
Example 8 – Export Button

- Click the “Create Item” icon for the Page Layout
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
Example 8 – Export Button

<table>
<thead>
<tr>
<th>Focus Name</th>
<th>Controller</th>
<th>Application Module</th>
<th>View Object</th>
<th>View Attribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>pageLayout</td>
<td>ByrCntctDirCO</td>
<td>ByrSuppAM</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>rawText: &lt;noscript&gt;JavaScript enabled browser re...</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>stackLayout</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>table: Contacts Table</td>
<td></td>
<td></td>
<td>ContactsVO</td>
<td>PersonFirstName</td>
</tr>
<tr>
<td></td>
<td>messageStyledText: First Name</td>
<td></td>
<td>ContactsVO</td>
<td>PersonLastName</td>
</tr>
<tr>
<td></td>
<td>messageStyledText: Last Name</td>
<td></td>
<td>ContactsVO</td>
<td></td>
</tr>
<tr>
<td></td>
<td>messageStyledText: Phone Number</td>
<td></td>
<td>ContactsVO,PrimaryPhoneNumber</td>
<td></td>
</tr>
</tbody>
</table>

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.
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 FNDCPSRSSSWA to the destination function for the button would call the submit current request with no parameters
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
&programAppName=SQLAP
&programName=APXSOBLX
&programRegion=Hide
&scheduleRegion=Hide
&notifyRegion=Hide
&printRegion=Hide
```

![Image of button properties with code highlighted]
Concurrent request page with program name is displayed.

All pages hidden except parameters page and review page.

Click New button.
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
Example 10 – Modify Query

- Click on the query icon at the desired personalization level
Example 10 – Modify Query

- Add filters needed in Create Query form
- The Add Another field is used to add addition fields for filtering
Example 10 – Modify Query

- No Results Found for Type “Employee”
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!  TEST!
TESTING

...THEN TEST IT AGAIN!

***BUT NOT IN PRODUCTION**
• 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
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.

```sql
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

```sql
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')
```
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

<table>
<thead>
<tr>
<th>Function Name</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>FND Diagnostics Menu Examine Read Only</td>
<td>Read only for Help → Diagnostics → Examine</td>
</tr>
<tr>
<td>FND Diagnostics Personalize Read Only</td>
<td>Read only for Help → Diagnostics → Custom Code</td>
</tr>
<tr>
<td>FND Diagnostics Values Read Only</td>
<td>Read only for Help → Diagnostics → Properties</td>
</tr>
</tbody>
</table>
Read-Only Diagnostics 12.1.3

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

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