

**Oracle® Fusion Applications**  
Extensibility Guide  
**11g Release 1 (11.1.1.5)**  
**E16691-02**

September 2011

Copyright © 2011 Oracle and/or its affiliates. All rights reserved.

Primary Author: Chris Kutler (lead), Sarah Bernau, Shelly Butcher, Ralph Gordon, Peter Jew, Mark Kennedy, Robin Whitmore, Steven Leslie, Landon Ott, Leslie Studdard, Marla Azriel

Contributing Author:

Contributor:

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, duplication, disclosure, modification, and adaptation shall be subject to the restrictions and license terms set forth in the applicable Government contract, and, to the extent applicable by the terms of the Government contract, the additional rights set forth in FAR 52.227-19, Commercial Computer Software License (December 2007). Oracle America, Inc., 500 Oracle Parkway, Redwood City, CA 94065.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information on content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

---

---

# Contents

<b>Preface .....</b>	ix
Audience.....	ix
Documentation Accessibility .....	ix
Related Documents .....	ix
Conventions .....	x
<b>What's New in This Guide for 11g Release 1 (11.1.1.5) .....</b>	xi

## Part I Introduction to Customizing and Extending Oracle Fusion Applications

### 1 Customizing and Extending Oracle Fusion Applications

1.1    Understanding Customizing and Extending Oracle Fusion Applications .....	1-1
1.2    Understanding Customization Layers.....	1-6
1.3    Understanding the Business User and Developer Tools.....	1-8
1.3.1        What You Can Customize and Extend and with Which Tool .....	1-12
1.3.2        Installing Customization Tools.....	1-16

### 2 Understanding the Customization Development Lifecycle

2.1    Understanding Typical Customization Workflows.....	2-1
2.1.1        Typical Runtime Workflow.....	2-2
2.1.2        Typical Design Time Workflow.....	2-4
2.2    Using the Sandbox Manager .....	2-5
2.2.1        Sandboxes and Concurrent Usage .....	2-7
2.2.1.1            Guidelines for One Sandbox, Multiple Users.....	2-9
2.2.1.2            Guidelines for Multiple Sandboxes, Multiple Users .....	2-9
2.2.2        Setting Up Sandboxes .....	2-10
2.2.3        Publishing Sandboxes .....	2-13
2.3    Using Customization Manager to Manage Runtime Customizations .....	2-14
2.3.1        Before You Begin Using Customization Manager .....	2-14
2.3.2        Viewing Customizations Using Customization Manager .....	2-15
2.3.3        Downloading and Uploading Customization Files.....	2-16
2.3.4        Promoting a Customization to the Tip .....	2-17

## Part II Business User Customizations and Extensions

### **3 Customizing Existing Pages**

3.1	About Customizing Existing Pages.....	3-1
3.1.1	What You Can Do with Pages at Runtime .....	3-1
3.1.2	What You Cannot Do with Pages at Runtime .....	3-2
3.1.3	Before You Begin Customizing Existing Pages .....	3-3
3.2	Editing a Page in Oracle Composer .....	3-4
3.3	Editing Component Properties in Oracle Composer.....	3-11
3.4	Editing the UI Shell Template Used by All Pages.....	3-12
3.5	Editing Pages in Oracle JDeveloper After Using Oracle Composer.....	3-14

### **4 Customizing Objects**

4.1	About Customizing and Extending Your Fusion Application with Objects .....	4-1
4.1.1	What You Can Customize and Create in the Runtime Environment .....	4-2
4.1.2	What You Cannot Customize in the Runtime Environment.....	4-2
4.1.3	Before You Begin Customizing and Extending Your Oracle Fusion Application with Objects .....	4-3
4.2	Editing Objects .....	4-3
4.3	Editing a Page in CRM Application Composer.....	4-5
4.4	Creating Custom Objects .....	4-7
4.5	Creating and Editing Search Objects.....	4-8
4.6	Editing Objects and Pages in Oracle JDeveloper After Using CRM Application Composer .....	4-9

### **5 Using Flexfields for Custom Attributes**

5.1	About Using Flexfields.....	5-1
5.1.1	What You Can Do with Flexfields at Runtime .....	5-2
5.1.2	What You Cannot Do with Flexfields at Runtime .....	5-6
5.1.3	Before You Begin Using Flexfields to Create Custom Attributes .....	5-6
5.2	Planning Your Flexfields.....	5-6
5.3	Creating Custom Value Sets.....	5-14
5.4	Configuring Flexfields.....	5-20
5.4.1	Configuring Descriptive Flexfields .....	5-21
5.4.2	Configuring Extensible Flexfields .....	5-23
5.5	Validating Flexfield Configurations.....	5-25
5.6	Deploying Flexfield Configurations.....	5-25
5.7	Integrating Custom Attributes.....	5-27

### **6 Customizing the Navigator Menu**

6.1	About Navigator Menu Configuration.....	6-1
6.1.1	What You Can Do with the Navigator Menu.....	6-3
6.1.2	What You Cannot Do with the Navigator Menu .....	6-3
6.1.3	Before You Begin Customizing the Navigator Menu.....	6-3
6.2	Adding Groups .....	6-4
6.3	Adding Items .....	6-5
6.4	Hiding and Showing Nodes.....	6-6

## **7 Customizing and Extending BPMN Processes**

7.1	About Customizing BPMN Processes.....	7-1
7.1.1	Oracle Tools for Customizing and Extending BPMN Processes .....	7-2
7.1.2	What You Can Do with BPMN Processes at Runtime .....	7-3
7.1.2.1	What You Can Customize Using Oracle SOA Composer and Oracle BPM Worklist .....	7-3
7.1.2.2	What You Can Customize Using Oracle Business Process Composer.....	7-3
7.1.3	What You Cannot Do with BPMN Processes at Runtime .....	7-4
7.1.4	Before You Begin Customizing BPMN Processes.....	7-4
7.2	Creating an Oracle BPM Project .....	7-5
7.3	Customizing BPMN Processes.....	7-6
7.4	Publishing Oracle BPM Projects .....	7-8
7.5	Deploying an Oracle BPM Project .....	7-9
7.6	Configuring BPMN Processes within an Oracle Fusion Application .....	7-10

## **8 Customizing Reports and Analytics**

8.1	About Customizing Reports and Analytics .....	8-1
8.2	Customizing Reports.....	8-1
8.2.1	About Customizing Reports .....	8-2
8.2.1.1	About Tasks Required When Customizing Reports That Are Submitted by the Oracle Enterprise Scheduler .....	8-2
8.2.1.2	What You Can Customize .....	8-2
8.2.1.3	Related Report Customization Tasks .....	8-3
8.2.1.4	Tools for Customizing Reports.....	8-4
8.2.1.5	Before You Begin Customizing Reports.....	8-4
8.2.2	Customizing Layouts .....	8-6
8.2.2.1	Customizing RTF Templates .....	8-11
8.2.2.1.1	Customizing an RTF Template: Examples .....	8-13
8.2.2.2	Customizing BI Publisher Templates .....	8-19
8.2.3	Customizing Data Models.....	8-21
8.2.3.1	Editing Existing Data Models .....	8-21
8.2.3.2	Creating a New Data Model .....	8-22
8.2.4	Creating Custom Reports .....	8-23
8.2.5	Adding Translations.....	8-24
8.2.6	Tasks Required to Run Custom Reports with Oracle Enterprise Scheduler Service .....	8-24
8.2.6.1	Creating a New Oracle Enterprise Scheduler Job Definition.....	8-25
8.2.6.2	Customizing Parameters for Reports Submitted Through Oracle Enterprise Scheduler .....	8-25
8.2.7	Securing Custom Reports and Related Components .....	8-26
8.2.8	Making Reports Available to Users in the Reports and Analytics Pane .....	8-29
8.3	Customizing Analytics.....	8-30
8.3.1	About Customizing Analytics .....	8-30
8.3.1.1	What You Can Customize in Analytics.....	8-31
8.3.1.2	Before You Begin Customizing Analytics.....	8-32
8.3.2	Customizing Analytics.....	8-32
8.3.3	Customizing the Oracle BI Repository (RPD) .....	8-33

## **9 Customizing Security for Custom Business Objects**

9.1	About Defining Security Policies.....	9-1
9.1.1	About the Implementation of Security Policies in CRM Application Composer .....	9-2
9.1.2	What You Can Do With Security Policies at Runtime.....	9-3
9.1.3	What You Cannot Do With Security Policies at Runtime.....	9-7
9.1.4	Before You Begin Customizing Security .....	9-8
9.2	Defining Security Policies for Custom Business Objects.....	9-9
9.3	Enabling End User Instance-Level Security Customization.....	9-11
9.4	Preventing Corrupted Security Policies in CRM Application Composer .....	9-12

## **Part III Developer Customizations and Extensions**

### **10 Using JDeveloper for Customizations**

10.1	About Using JDeveloper for Customization.....	10-1
10.1.1	About Customizing Oracle ADF Artifacts.....	10-2
10.1.2	About Using JDeveloper to Customize SOA Composites.....	10-4
10.1.3	Before You Begin Using JDeveloper to Customize.....	10-5
10.2	Customizing Oracle ADF Artifacts with JDeveloper .....	10-5
10.2.1	Creating the Customization Application Workspace .....	10-5
10.2.2	Customizing the Artifacts.....	10-7
10.2.3	Determining What ADF Artifacts You Need to Customize .....	10-10
10.2.4	Importing Customizations into Your Workspace.....	10-10
10.3	Customizing SOA Composites with JDeveloper .....	10-11
10.3.1	Before You Begin Using JDeveloper to Customize.....	10-11
10.3.2	Setting Up the JDeveloper Workspace and Composite Project for MDS Customization .....	10-12
10.3.3	Customizing the Composite.....	10-16
10.3.4	Customizing SOA Resource Bundles.....	10-16

### **11 Customizing and Extending ADF Application Artifacts**

11.1	About Customizing Oracle ADF Application Artifacts .....	11-1
11.1.1	Before You Begin Customizing Oracle ADF Application Artifacts .....	11-2
11.2	Editing Existing Business Components .....	11-3
11.3	Editing Task Flows .....	11-5
11.4	Editing Pages .....	11-6
11.5	Creating Custom Business Components .....	11-6
11.6	Creating Custom Task Flows .....	11-9
11.7	Creating Custom Pages.....	11-9
11.8	Customizing or Creating a Custom Search Object.....	11-10
11.9	Editing the UI Shell Template .....	11-11
11.10	Customizing or Adding Resource Bundles.....	11-11
11.11	Deploying ADF Customizations and Extensions.....	11-11

### **12 Customizing and Extending SOA Components**

12.1	About Customizing and Extending SOA Components .....	12-1
12.1.1	Before You Begin Customizing SOA Composites .....	12-4

12.2	Customizing SOA Composites .....	12-5
12.3	Merging Runtime Customizations from a Previously Deployed Revision into a New Revision .....	12-14
12.4	Extending or Customizing Custom SOA Composites .....	12-17
12.5	Deploying SOA Composite Customizations and Extensions .....	12-22

## **13 Customizing and Extending Oracle BPM Project Templates**

13.1	About Customizing Project Templates.....	13-1
13.1.1	About the Business Catalog .....	13-2
13.1.2	Before You Begin Using JDeveloper to Customize Project Templates .....	13-2
13.2	Customizing or Extending a Project Template.....	13-3
13.3	Publishing Project Templates.....	13-4

## **14 Customizing and Extending Oracle Enterprise Scheduler Jobs**

14.1	About Customizing and Extending Oracle Enterprise Scheduler Jobs .....	14-1
14.1.1	Main Steps for Extending Oracle Enterprise Scheduler Jobs .....	14-2
14.1.2	Main Steps for Customizing Oracle Enterprise Scheduler Jobs.....	14-2
14.1.3	Before You Begin Extending and Customizing Oracle Enterprise Scheduler Jobs.	14-2
14.2	Extending Custom Oracle Enterprise Scheduler Jobs .....	14-2
14.2.1	Extending a Custom PL/SQL Oracle Enterprise Scheduler Job.....	14-4
14.2.2	Extending a Custom Oracle BI Publisher Oracle Enterprise Scheduler Job.....	14-8
14.2.3	Extending a Custom Java Oracle Enterprise Scheduler Job .....	14-8
14.2.4	Submitting Oracle Enterprise Scheduler Jobs.....	14-12
14.3	Customizing Existing Oracle Enterprise Scheduler Jobs .....	14-13

## **15 Customizing Security for ADF Application Artifacts**

15.1	About the Oracle Fusion Security Approach.....	15-1
15.1.1	How to Proceed With This Chapter.....	15-2
15.1.2	Related Security Documents .....	15-2
15.2	About Extending the Oracle Fusion Security Reference Implementation.....	15-3
15.3	About Extending and Securing Oracle Fusion Applications .....	15-4
15.3.1	Oracle Fusion Security Customization Guidelines for New Functionality.....	15-5
15.3.2	Oracle Fusion Security Customization Process Overview .....	15-6
15.3.3	Oracle Fusion Security Customization Scenarios .....	15-8
15.3.4	Scenarios Related to Extending and Securing Data Model Components.....	15-11
15.3.5	Scenarios Related to Extending and Securing User Interface Artifacts .....	15-14
15.3.6	What You Can Customize in the Data Security Policy Store at Design Time .....	15-16
15.3.7	What You Can Customize in the Data Model Project at Design Time .....	15-19
15.3.8	What You Can Customize in the User Interface Project at Design Time .....	15-20
15.3.9	What You Can Customize in the Application Security Policy Store at Design Time .....	15-21
15.3.10	What You Cannot Do with Security Policies at Design Time .....	15-25
15.3.11	Before You Begin Customizing Security .....	15-26
15.4	Defining Data Security Policies on Custom Business Objects.....	15-28
15.5	Enforcing Data Security in the Data Model Project .....	15-31
15.6	Defining Function Security Policies for the User Interface Project.....	15-33

## **16 Translating Custom Text**

16.1	About Translating Custom Text .....	16-1
16.2	Translating Resource Bundles from Metadata Services Metadata Repository .....	16-1
16.3	Translating Oracle Composer and CRM Application Composer Customizations .....	16-3
16.4	Translating Navigator Menu Customizations .....	16-4
16.5	Translating Flexfield and Value Set Configurations.....	16-5

## **17 Configuring End User Personalization**

17.1	About Configuring End User Personalization.....	17-1
17.1.1	Before You Begin Allowing Pages or Components to be Personalized.....	17-2
17.2	Allowing Pages to be Personalized by End Users in Oracle Composer .....	17-3
17.3	Configuring End User Personalization for Components.....	17-3

## **18 Customizing Help**

18.1	About Customizing Help.....	18-1
18.1.1	What You Can Do with Help .....	18-3
18.1.2	Before You Begin Customizing Help .....	18-4
18.2	Customizing or Extending Oracle Fusion Applications Help.....	18-4
18.3	Customizing or Adding Bubble Embedded Help.....	18-5
18.4	Customizing or Adding Static Instructions, In-field Notes, and Terminology Definitions .....	18-5

---

---

# Preface

Welcome to *Oracle Fusion Applications Extensibility Guide*.

## Audience

This document is intended for business analysts and developers who want to customize and extend the standard functionality provided by Oracle Fusion Applications.

## Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at  
<http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

### Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

## Related Documents

You can also find information about Oracle Fusion Middleware and extending and customizing Oracle Fusion Applications in the following documents:

- *Oracle Fusion Applications Administrator and Implementor Roadmap*
- *Oracle Fusion Applications Common Implementation Guide*
- *Oracle Fusion Applications Developer's Guide*
- *Oracle Fusion Applications Concepts Guide*
- *Oracle Fusion Applications CRM Extensibility Guide*
- *Oracle Fusion Middleware Fusion Developer's Guide for Oracle Application Development Framework*
- *Oracle Fusion Middleware Web User Interface Developer's Guide for Oracle Application Development Framework*
- *Oracle Fusion Middleware User's Guide for Oracle WebCenter Spaces*
- *Oracle Fusion Middleware Developer's Guide for Oracle SOA Suite*

- *Oracle Fusion Middleware Business Process Composer User's Guide for Oracle Business Process Management*
- *Oracle Fusion Middleware Modeling and Implementation Guide for Oracle Business Process Management*
- *Oracle Fusion Middleware Administrator's Guide for Oracle SOA Suite and Oracle Business Process Management Suite*
- *Oracle Fusion Middleware User's Guide for Oracle Business Rules*
- *Oracle Fusion Applications Security Guide*
- *Oracle Fusion Applications Security Hardening Guide*
- *Oracle Fusion Middleware Application Security Guide*
- *Oracle Fusion Middleware Oracle Authorization Policy Manager Administrator's Guide (Oracle Fusion Applications Edition)*
- *Oracle Fusion Middleware User's Guide for Oracle Identity Manager*
- *Oracle Database Security Guide*
- *Oracle Fusion Middleware Metadata Repository Builder's Guide for Oracle Business Intelligence Enterprise Edition (Oracle Fusion Applications Edition)*
- *Oracle Fusion Middleware Data Modeling Guide for Oracle Business Intelligence Publisher (Oracle Fusion Applications Edition)*
- *Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher*
- *Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition (Oracle Fusion Applications Edition)*
- *Oracle Fusion Applications Developer's Guide for Oracle Enterprise Scheduler*
- *Oracle Fusion Applications Administrator's Guide*
- *Oracle Fusion Applications Patching Guide*
- *Oracle Fusion Applications Installation Guide*
- *Oracle Fusion Middleware WebLogic Scripting Tool Command Reference*

## Conventions

The following text conventions are used in this document:

Convention	Meaning
<b>boldface</b>	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
<code>monospace</code>	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

---

# What's New in This Guide for 11g Release 1 (11.1.1.5)

For 11g Release 1 (11.1.1.5), this guide has been updated in several ways. The following table lists the sections that have been added or changed.

For changes made to Oracle JDeveloper and Oracle Application Development Framework (Oracle ADF) for this release, see the What's New page on the Oracle Technology Network at

<http://www.oracle.com/technetwork/developer-tools/jdev/documentation/index.html>.

Sections	Changes Made
<b>Chapter 8 Customizing Reports and Analytics</b>	
<a href="#">Section 8.2.1, "About Customizing Reports"</a>	Section revised to discuss the tasks that are required when customizing reports that are submitted by the Oracle Enterprise Scheduler and how to understand the use of parameter view objects with the Oracle Enterprise Schedule Service.
<a href="#">Section 8.2.2, "Customizing Layouts"</a>	Section revised to discuss the steps for deleting a layout.
<a href="#">Section 8.2.3, "Customizing Data Models"</a>	Section added to describe the tasks required to create a custom data model.
<a href="#">Section 8.2.6, "Tasks Required to Run Custom Reports with Oracle Enterprise Scheduler Service"</a>	Section retitled and revised to provide additional information about registering and running custom reports
<a href="#">Section 8.2.7, "Securing Custom Reports and Related Components"</a>	Section added to describe how to secure custom reports.
<a href="#">Section 8.3.1, "About Customizing Analytics"</a>	Section revised to include guidelines for when to perform online and offline RPD edits.

Sections	Changes Made
Section 8.3.3, "Customizing the Oracle BI Repository (RPD)"	<p>Section revised to include information about connecting as FUSION_APPS_BI_APPID when importing view objects.</p> <p>Section also revised to include cross-references to <a href="#">Chapter 5, "Using Flexfields for Custom Attributes"</a> for information about changing flexfields and enabling flexfields for business intelligence. Section revised to remove misleading text from "Task: Modifying Existing Fact or Dimension Tables."</p> <p>Section revised to rename "Task: Renaming Presentation Layer Metadata" to "Task: Changing How Metadata Is Displayed in Answers Reports" and to clarify task text.</p>
<b>Chapter 11 Customizing and Extending ADF Application Artifacts</b>	
Section 11.11, "Deploying ADF Customizations and Extensions"	Section revised to include information about using the wizard-generated MAR profile.
<b>Chapter 14 Customizing and Extending Oracle Enterprise Scheduler Jobs</b>	
Section 14.2.1, "Extending a Custom PL/SQL Oracle Enterprise Scheduler Job"	Section added to describe the tasks required to extend a custom PL/SQL scheduled job.
Section 14.2.2, "Extending a Custom Oracle BI Publisher Oracle Enterprise Scheduler Job"	Section added to describe the tasks required to extend a custom Oracle BI Publisher scheduled job.
Section 14.2.3, "Extending a Custom Java Oracle Enterprise Scheduler Job"	Section added to describe the tasks required to extend a custom Java scheduled job.

# **Part I**

---

## **Introduction to Customizing and Extending Oracle Fusion Applications**

Part I contains the following chapters:

- [Chapter 1, "Customizing and Extending Oracle Fusion Applications"](#)
- [Chapter 2, "Understanding the Customization Development Lifecycle"](#)



---

# Customizing and Extending Oracle Fusion Applications

This chapter provides an overview of how to customize and extend Oracle Fusion Applications, and introduces the tools used in the process.

---

**Note:** Before you begin to customize or extend Oracle Fusion Applications, you first must install and implement them. For more information, see *Oracle Fusion Applications Administrator and Implementor Roadmap*.

---

This chapter includes the following sections:

- [Section 1.1, "Understanding Customizing and Extending Oracle Fusion Applications"](#)
- [Section 1.2, "Understanding Customization Layers"](#)
- [Section 1.3, "Understanding the Business User and Developer Tools"](#)

## 1.1 Understanding Customizing and Extending Oracle Fusion Applications

While Oracle Fusion applications provide robust out-of-the-box functionality, there may be areas of one of the applications that you need to change to meet your business needs. This book will guide you through the process of extending and customizing Oracle Fusion applications. Note that you can also create a complete Java EE application to supplement your Oracle Fusion applications. Refer to the *Oracle Fusion Applications Developer's Guide* for more information.

All Oracle Fusion applications are based on Oracle Fusion Middleware. Most user interfaces are implemented using Oracle Application Development Framework (Oracle ADF) and standard Java technologies. The foundation of the applications are the Service Oriented Architecture (SOA) business processes. Business intelligence frameworks provide a number of reporting capabilities. Identity management works at every level to control access. Each of these areas of an application can be customized and extended to suit your business needs.

Additionally, Oracle Fusion applications are built using a common data model. Because of this commonality, when you make a customization in one area, that customization will be available to all objects in the application. For example, if you add an attribute to an object, that attribute can easily be added to the web-based view page, to an associated mobile page, and to any associated reports. And for the most

part, the tools and processes you use to customize one application will be the same tools and processes to customize all of Oracle Fusion applications.

---

**Note:** If your Oracle Fusion applications are part of a multi-tenant environment, or is deployed as a Software as a Service Solution (SaaS) environment, then only a subset of customization capabilities will be available to you. You need to refer to the SaaS documentation for your customization procedures.

---

Within this guide, the term *customizing* means to change a standard (existing) artifact. For example, you can add an attribute to a standard business object, or you can change what is displayed on a standard view page. The term *extending* means to create a completely new artifact, such as a custom business object or custom view page. For customizations and extensions, there are three basic scenarios: personalization, runtime customizations and extensions, and design time customizations and extensions.

### Personalization

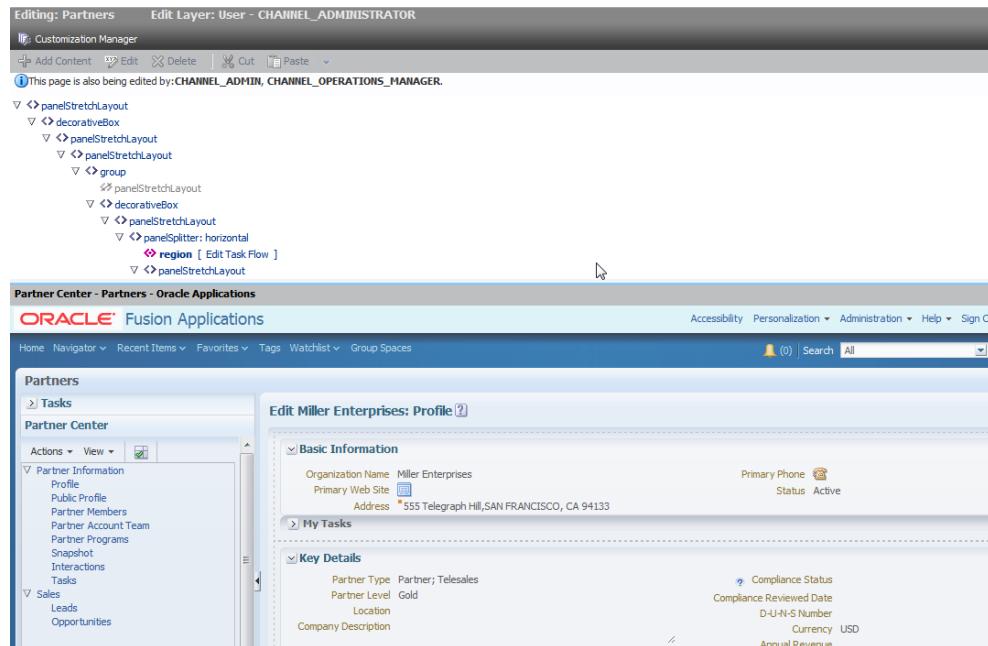
*Personalization* refers to the changes that every end user of the Oracle Fusion Application product suite can make to certain artifacts in the user interface (UI) at runtime. These changes remain for that user each time that user logs into the application. Personalization includes changes based on user behavior (such as changing the width of a column in a table), changes the user elects to save, such as search parameters, or composer-based personalizations, where an end user can redesign aspects of a page.

For composer-based personalizations, Oracle Fusion Applications includes Oracle Composer, which allows end users to change certain UI pages to suit their needs. For example, they can rearrange certain objects on a page, add and remove designated content, and save queries. [Figure 1-1](#) shows the Partner Profile page in Oracle Composer. An end user can add other content to this page, or change the order of the current content.

---

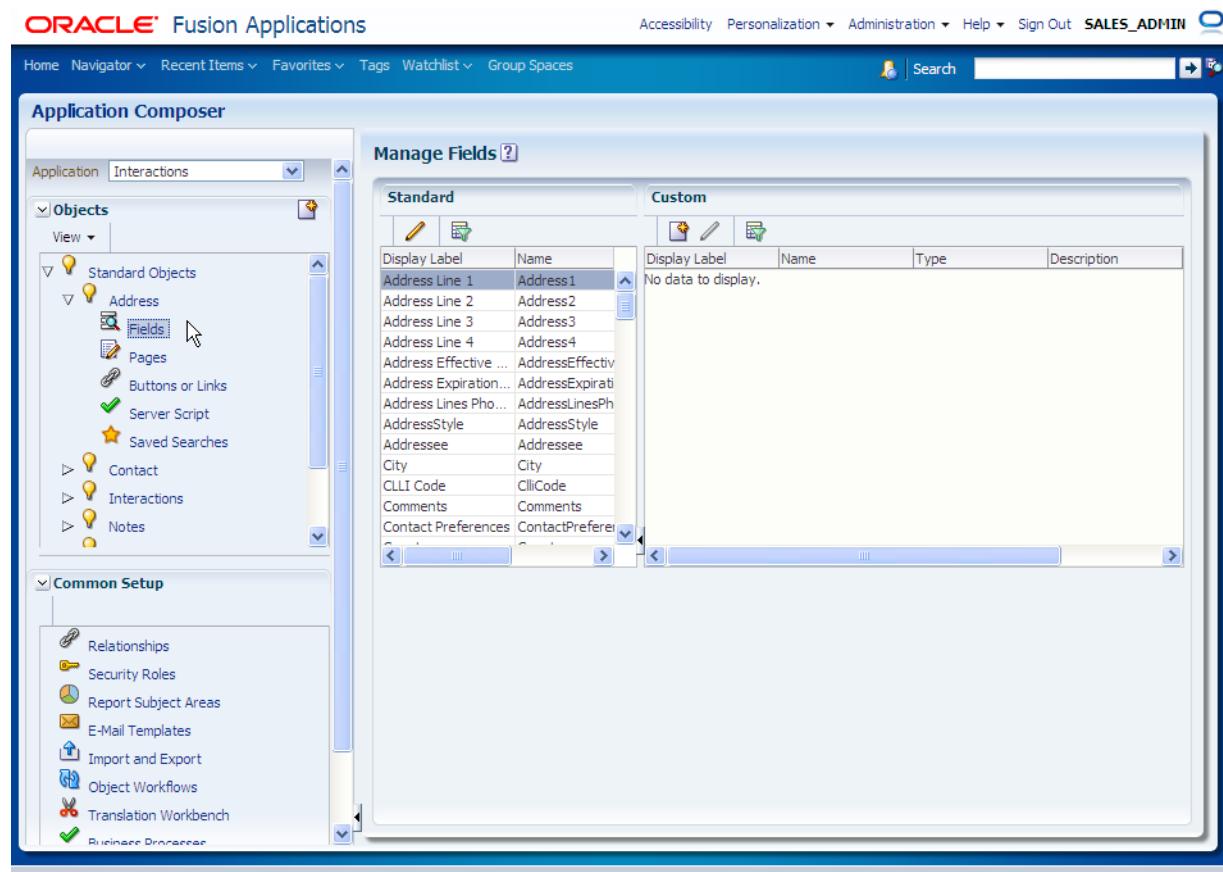
**Note:** By default, only certain personalizations are allowed. You can customize what can be personalized. For more information, see [Chapter 17, "Configuring End User Personalization."](#)

---

**Figure 1–1 End Users Can Personalize UIs with Oracle Composer**

### Runtime customizations and extensions

*Runtime* customizations and extensions include those that a business analyst user at your enterprise can make to an Oracle Fusion application at runtime using browser-based composers. These customizations and extensions are surfaced to all or to a subset of Oracle Fusion Applications users, and range from changing the look and feel of a page, to customizing standard business objects, adding a new business object and associated pages and application functionality, changing workflows, defining security for new objects, and customizing reports. [Figure 1–2](#) shows how you can customize the fields on a standard business object using Oracle CRM Application Composer, which is a runtime tool used to customize and extend certain CRM applications.

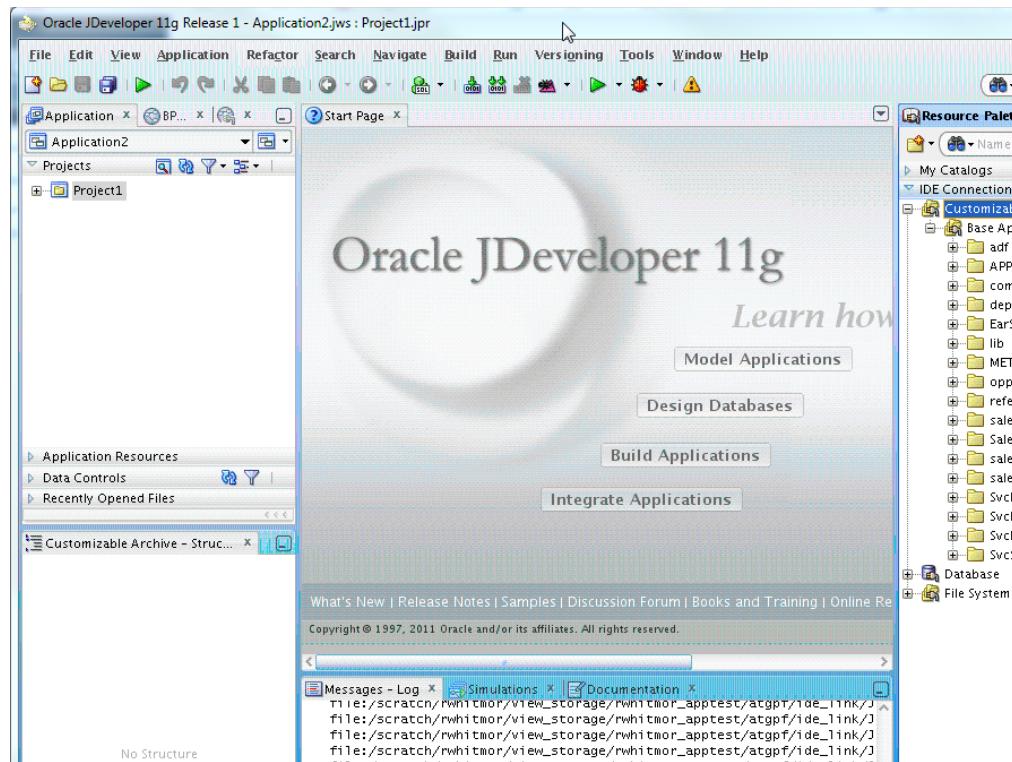
**Figure 1–2 CRM Application Composer Allows You to Customize Business Objects at Runtime**

Customizing and extending Oracle Fusion applications using runtime tools are covered in [Part II, "Business User Customizations and Extensions"](#).

### **Design time customizations and extensions**

*Design time* customizations and extensions include more complex changes, such as creating SOA composites or creating new batch jobs, and they require deployment into the runtime environment. Design time customizations are most often done by Java developers using Oracle JDeveloper (a comprehensive IDE), as shown in [Figure 1–3](#), or they may be done in other tools, such as SOA Composer. The customizations are then uploaded or deployed to a running instance of Oracle Fusion Applications.

Developer-level extensions are covered in [Part III, "Developer Customizations and Extensions"](#).

**Figure 1–3 Oracle JDeveloper IDE**

**Tip:** You can also extend an Oracle Fusion application by creating a completely separate application and integrating it into Oracle Fusion Applications. For more information about creating an Oracle Fusion application, see the *Oracle Fusion Applications Developer's Guide*.

Most customizations made to an Oracle Fusion application, whether a personalization an end user makes, a change a business user makes using a runtime composer tool, or a change a developer makes using JDeveloper to create new source code, are stored in a business metadata repository. Because these customizations are kept separate from the base code, you can safely upgrade your Oracle Fusion application without overwriting or needing to redo your changes.

Customizations for the UI and for business components are created in layers, meaning that you can create them for specific users (as in the case of personalization), or for specific roles or sites, and the changes will be shown only when applicable. For more information about the metadata dictionary and customization layers, see [Section 1.2, "Understanding Customization Layers."](#)

Customizations made at runtime can be saved in a sandbox so that the changes can be isolated and validated before being published into a full test environment. Changes done at design time are done in a development environment, and can also be deployed to a sandbox before being deployed into the full test environment. For more information about sandboxes, see [Section 2.2, "Using the Sandbox Manager."](#)

Because most pages in an application consist of a number of different components (some of them actually being another page), it can be difficult to discern what has been customized, and for what layer. During customization of a page, you can use Customization Manager to understand the state of each artifact on a page: whether it has been customized, and if so, for what layer. You can import customizations that others have done, or you can export your own customizations. For more information

about using Customization Manager and sandboxes, see [Chapter 2, "Understanding the Customization Development Lifecycle."](#)

## 1.2 Understanding Customization Layers

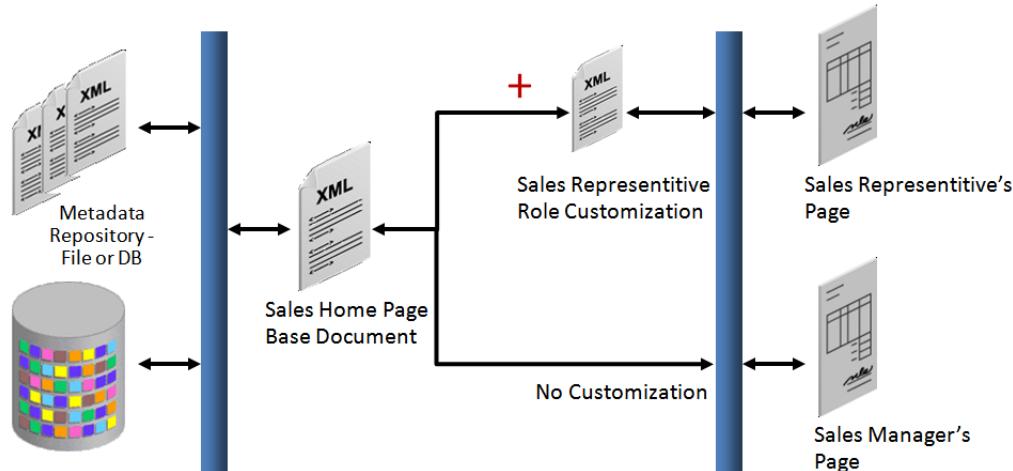
Oracle Fusion applications contain built-in customization layers that allow you to make customizations that affect only certain instances of an application. For example, the Sales application has a layer for job role. When you customize an artifact, you can choose to make that customization available only to users of a specific job role, for example, a sales representative.

Customizations you make are not saved to the base standard artifact. Instead, they are saved to an XML file that is stored in the Metadata Services (MDS) repository. This XML file acts like a list of instructions that determines how the artifact looks or behaves in the application, based on the layer that is controlling the current context. The MDS Customization Engine manages this process.

For example, say you want to customize the Sales home page by removing the Quick Create panel, but only for users with the Sales Representative role. Before you make your customization, you first select the layer to make your customization in, in this case the role layer whose value is Sales Representative. When you make your customization by removing that pane from the page, an XML file is generated with the instructions to remove the pane, but only in the role layer, and only when the value is Sales Representative. The original page file remains untouched. The MDS Customization Engine then stores the XML file in the MDS repository.

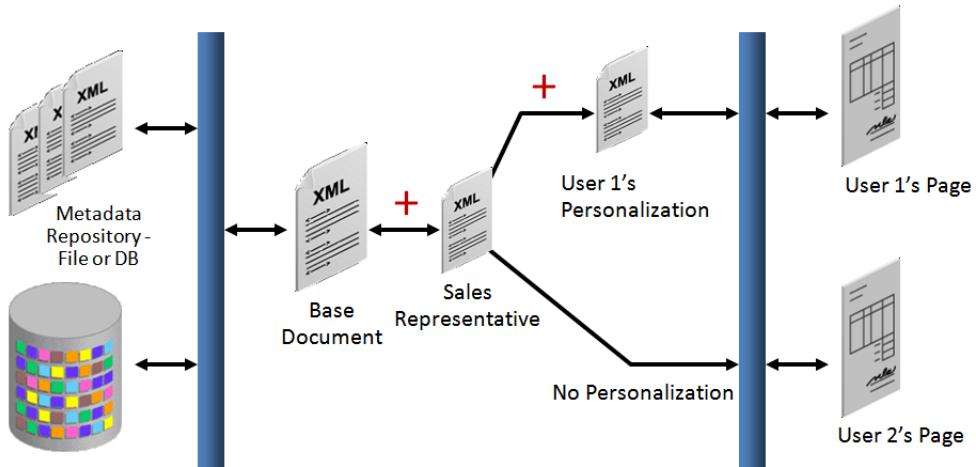
Now, whenever someone logs into the application and requests an artifact, the MDS Customization Engine checks the repository for XML files that match the requested artifact and the given context, and if there is a match, it layers the instructions on top of the base artifact. In this example, whenever the Sales home page is requested (the artifact) by someone who is assigned the role of Sales Representative (the context), before the page is rendered, the MDS Customization Engine pulls the corresponding XML file from the repository and layers it on top of the standard Sales home page, thereby removing that pane. Whenever someone who is not a Sales Representative logs in (for example, someone with the role of Sales Manager), the XML file with your changes is not layered on top, and so the Quick Create panel is displayed.

[Figure 1–4](#) shows how the customization XML file is applied to the base document and shown only to a sales representative.

**Figure 1–4 One Customization Layer Handled by the MDS Customization Engine**

All users of Oracle Fusion applications can personalize certain pages using the Personalization menu. Users can move elements around on a page, hide elements, and even add available elements to their page. When they do this personalization, the MDS Customization Engine creates an XML file specific to that user.

For example, say User 1 (who has the role of Sales Representative) personalizes the Sales home page. There will then be an XML file stored in the repository, noting the changes that user made. When User 1 logs in, as in the previous example, the MDS Customization Engine pulls the XML file with the sales representative customizations from the repository and layers it on top of the standard Sales home page. In addition, the engine pulls the XML file with User 1's personalizations, allowing the user to see the personalization changes along with the Sales Representative changes. When other Sales Representatives log in, they do not see User 1's personalization changes, as shown in Figure 1–5.

**Figure 1–5 Personalizations Are Also Handled by the MDS Customization Engine**

The exact customization layers available for an application depend on that application family (refer to the product-specific documentation from Oracle Enterprise Repository available from Oracle Support for details). However, all Oracle Fusion applications have the following customization layers:

- Global: When customizations are made in this layer, they affect all users of the application. This layer's XML files are added for everyone, whenever the artifact is requested. Customizations made to ADF Business Components in JDeveloper must be made in the Global layer.
- Site: Customizations made in the Site layer affect users at a particular location.
- Enterprise: This layer is used to create customizations for all users of a specific tenant in a multiple tenant deployment. Site and Enterprise are synonymous unless the deployment is for multiple tenants.
- User: This is where all personalizations are made. Users do not have to explicitly select this layer. It is automatically selected when you use the Personalization menu.

These layers are applied in a hierarchy, and the highest layer in that hierarchy in the current context is considered the *tip*. Within the default customization layers, the Global layer is the base layer, and the User layer is the tip. If customizations are done to the same object, but in different layers, at runtime, the tip layer customizations take precedence. For example, if you customize the label for a field in the site layer using Oracle Composer and customize the same label in the global layer using JDeveloper, the site layer customization will be displayed at runtime.

Because customizations are saved in these XML files, when you patch or upgrade your Oracle Fusion applications, the base artifacts can be updated without touching your changes. The base artifact is replaced, and when the application is run after the patch or upgrade, the XML files are simply layered on top of the new version. You do not need to redo your customizations.

Before you create customizations, you will need to select the layer to which you want your customizations to be applied. Most of the tools you use to create your customizations provide a dialog where you can pick the layer for your customizations.

## 1.3 Understanding the Business User and Developer Tools

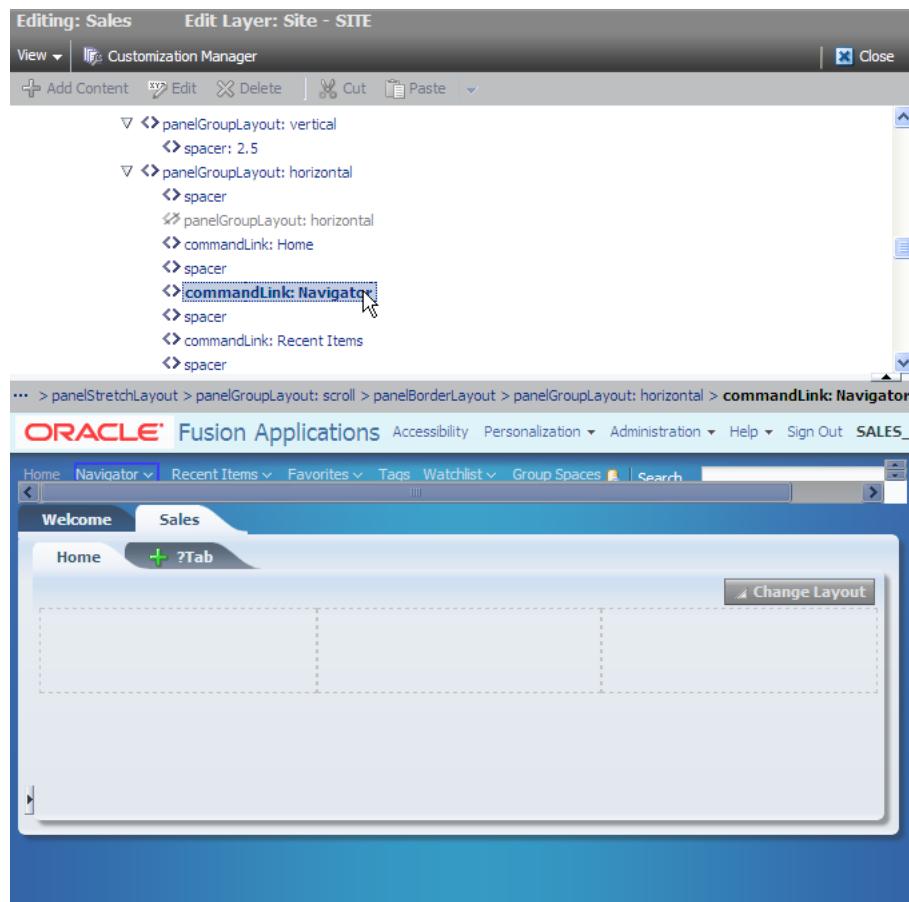
The user interfaces in Oracle Fusion applications are controlled by role based authentication, meaning that the information presented in the UI, and what the user can do in the UI, depends on the role assigned to the currently logged in user. For example, if you are assigned a role with administrative privileges, when you log into Oracle Fusion Applications, you will see an Administration menu, as shown in [Figure 1–6](#). This menu allows you to do things like customize a page for all users, or manage customizations.

**Figure 1–6 Oracle Fusion Applications Menu Bar**



Both personalization and customization use Oracle Composer to make changes to an application page. Using personalization, any user can drag and drop fields, rearrange regions, add approved external content and save their favorite queries.

Using administration customization, you also use Oracle Composer to customize pages for other users. You can add fields, add validation, change defaults, rearrange regions, and add external content. Oracle Composer allows you to work in either a WYSIWYG view or source view, as shown in [Figure 1–7](#).

**Figure 1–7 Oracle Composer**

For more information about customizing pages, see [Chapter 3, "Customizing Existing Pages."](#)

If you need to extend or customize the Sales, Marketing, Customer Center, Trading Community Architecture (TCA), and Order Capture applications that are part of the Customer Relationship Management (CRM) product family of Oracle Fusion Applications, then you can use CRM Application Composer to customize your pages.

---

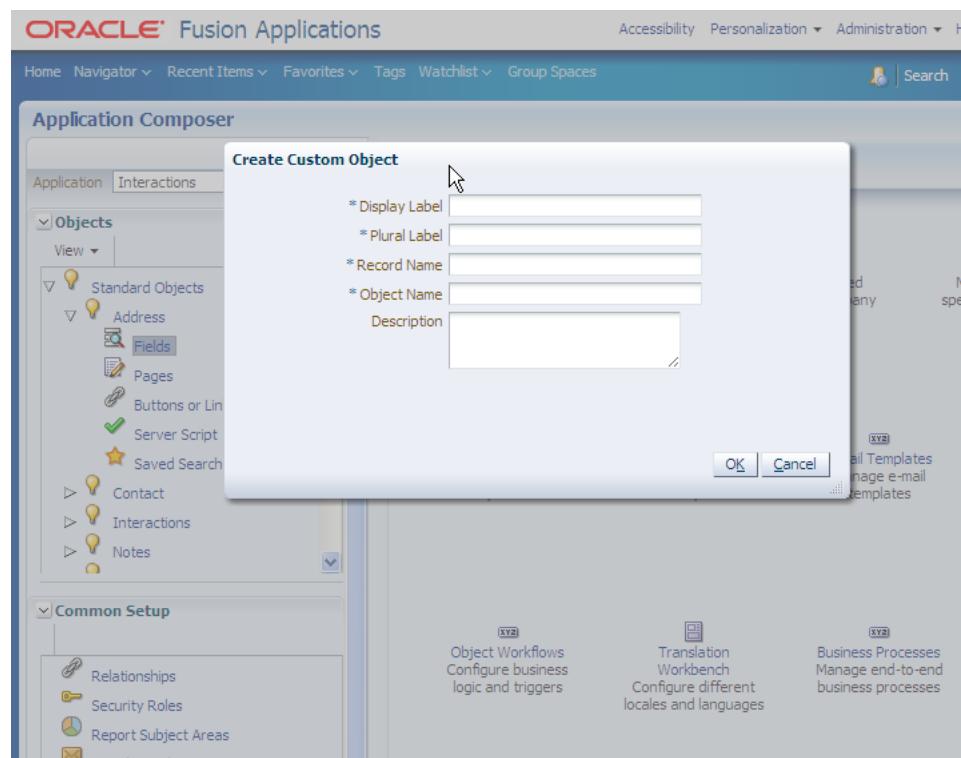
**Note:** Only certain pages are available for customization. For a complete list, refer to product-specific documentation from Oracle Enterprise Repository available from Oracle Support.

---

You access CRM Application Composer by clicking the **Application Composer** link from the Navigator menu of Oracle Fusion Applications, as shown in [Figure 1–8](#).

**Figure 1–8 Navigator Menu**

CRM Application Composer also allows business analysts to make more complex runtime customizations. In addition to customizing pages, business analysts can customize business objects and all the artifacts that support them (such as fields, pages, buttons and links, security, server scripts, and saved searches), and can also extend Oracle Fusion applications by creating completely new business objects and artifacts, as shown in [Figure 1–9](#). For more information, see [Chapter 4, "Customizing Objects."](#)

**Figure 1–9 CRM Application Composer**

When new business objects are created, you often also create associated Work Area pages for those objects. You can add those pages to the Navigator menu so that they can be accessed in the same way as standard objects. For more information, see [Chapter 6, "Customizing the Navigator Menu."](#)

When you create a new top-level business object, you can also create a new object workflow to manage any business processes associated with it. For example, say you used CRM Application Composer to create a marketing object and you want to create an associated approval flow. From within CRM Application Composer, you can access

Oracle Business Process Composer and create the process that defines that flow. For applications outside of CRM, you access Business Process Composer directly from the Navigator menu. For more information about using the Business Process Composer, see [Chapter 7, "Customizing and Extending BPMN Processes."](#)

When you create a new object in CRM Application Composer, you can define security policies for it. Data security policies define the end user's level of access to the data records of the business object. Function security policies define the end user's level of access to the application resources that display the object (for example a page or a task flow). Both types of security need to be defined for a security policy to be complete. Security policies are not stored in MDS. Instead, they are stored in Oracle Fusion Data Security database tables (for data security) and in an LDAP-based server running Oracle Internet Directory (for function security). For more information about creating security policies for custom CRM business objects, see [Chapter 9, "Customizing Security for Custom Business Objects."](#)

If you need to add an attribute to an object in an application that is not one of the five CRM applications, you can often use *flexfields*. Flexfields allow you to define object attributes on objects and then apply business logic to them. For example, an airline manufacturer might require very specific attributes for their orders that are not provided by the out-of-the-box implementation of an order. Because a flexfield exists for the order object, you can use it to create and configure the attribute you need. Once configured, flexfields are stored in MDS, and so are safe during patching and upgrading. You access flexfields from the Setup and Maintenance menu item from the Administration menu. For more information about flexfields, see [Chapter 5, "Using Flexfields for Custom Attributes."](#)

Oracle Fusion Applications come with a complete set of reports. You can customize these reports (for example, change the layout) to fit your particular business needs. Additionally, if you customize or create a business object, you can create a new report for that object. For more information, see [Chapter 8, "Customizing Reports and Analytics."](#)

When you need to customize or create business objects outside of the five CRM applications, or when the customizations you need to make cannot be made in one of the runtime composers, then you need to use JDeveloper to make those changes. When you work in a JDeveloper environment, you create a workspace that will contain your changes and additions. When you create this workspace, you do so in the Oracle Fusion Applications Developer role. Like Oracle Fusion applications, JDeveloper uses roles to shape what you see and can do in the IDE. Work done in a developer role is stored in actual projects with code that gets deployed to an environment. Once you create your project, if you are customizing an existing standard object (as opposed to creating a new object), then you do that work in the Oracle Fusion Applications Administrator Customization role. Work done in this role is saved to an XML file that gets deployed into MDS, keeping your changes separate from the base code. For more information about how to set up your JDeveloper customization environment, see [Chapter 10, "Using JDeveloper for Customizations."](#)

---

**Note:** You cannot create your own roles to define what you see and what you can do in JDeveloper.

---

Developers can use JDeveloper to create and customize view pages, business objects, task flows (flows that control navigation and business logic within the application), searches, and resource bundles. All customizations and extensions created in JDeveloper must be deployed to an environment. For more information about using

JDeveloper to customize business objects and associated artifacts, see [Chapter 11, "Customizing and Extending ADF Application Artifacts."](#)

SOA composites are the foundation on which Oracle Fusion applications are built: they are the glue that holds all the different application artifacts together and they allow the different applications to work in a unified manner. SOA composites for an application contain artifacts like Business Process Execution Language (BPEL) process flows. These flows provide communication between applications, additional human-based workflows, and business rules that determine branching in those flows. Developers can customize existing composites or create new ones using a mixture of JDeveloper and browser-based tools. Customized and extended SOA composites are all stored in MDS. For more information, see [Chapter 12, "Customizing and Extending SOA Components."](#)

Some Oracle Fusion applications provide business process modeling (BPM) project templates that you can use to create BPM projects. BPM projects consist of SOA artifacts, such as business rules and human tasks, and Business Process Modeling Notation (BPMN) processes. You can customize these project templates to suit your business needs. For more information, see [Chapter 13, "Customizing and Extending Oracle BPM Project Templates."](#)

Finally, when you create custom pages, you may want to make them personalizable, so that end users can change the page for themselves. For more information, see [Chapter 17, "Configuring End User Personalization."](#) Also, when you make any type of customization or extension to Oracle Fusion applications, you will likely need to change the embedded help that appears on the screen. For more information, see [Chapter 18, "Customizing Help."](#) And all customizations can be translated. For more information, see [Chapter 16, "Translating Custom Text."](#)

**Tip:** When you extend Oracle Fusion applications, you may want those extensions to be configurable using Oracle Fusion Applications Information Technology Management, Implement Applications Guide. For more information about creating setup flows for extensions, see the Oracle Fusion Applications Information Technology Management, Implement Applications Guide.

For a more detailed description of the workflow you need to follow when customizing and extending, see [Chapter 2, "Understanding the Customization Development Lifecycle."](#)

### 1.3.1 What You Can Customize and Extend and with Which Tool

The following table shows the artifacts that you can customize or create in Oracle Fusion Applications, what tool you use, the type of user that can make the change, and whether the changes are stored in MDS.

---

**Note:** CRM Application Composer is only available if you want to make changes in the following CRM applications:

- Marketing
  - Sales
  - Customer Center
  - Trading Community Architecture (TCA)
  - Order Capture
-

---

**Note:** While you can customize view pages in Oracle Composer and CRM Application Composer, only certain pages are configured to allow it. If the customization you want to make is not available in Oracle Composer, then you will need to use JDeveloper to make the customization.

---

**Table 1–1 Customization Scenarios in Oracle Fusion Applications**

Customization/ Extension	Tool	Type of User	MDS? Yes	Where to Find Information
View Pages				
Add, move, and delete components on a page.	Oracle Composer	Business Analyst	Yes	<a href="#">Section 3.2, "Editing a Page in Oracle Composer"</a>
Add fields, buttons, links, to a standard page (CRM)	CRM Application Composer	Business Analyst	Yes	<a href="#">Section 4.3, "Editing a Page in CRM Application Composer"</a>
Customize properties on UI components on a standard page	Oracle Composer	Business Analyst	Yes	<a href="#">Section 3.3, "Editing Component Properties in Oracle Composer"</a>
Customize properties on UI components on a standard page (CRM)	CRM Application Composer	Business Analyst	Yes	<a href="#">Section 4.2, "Editing Objects"</a>
Make UI components on a page personalizable	Oracle Composer	Business Analyst	Yes	<a href="#">Section 17.3, "Configuring End User Personalization for Components"</a>
Customize the UI Shell template	JDeveloper	Developer	Yes	<a href="#">Section 11.9, "Editing the UI Shell Template"</a>
Customize the UI Shell template (CRM)	Oracle Composer	Business Analyst	Yes	<a href="#">Section 3.4, "Editing the UI Shell Template Used by All Pages"</a>
Define resource bundles	JDeveloper	Developer	Yes	<a href="#">Section 11.10, "Customizing or Adding Resource Bundles"</a>
Make a custom page personalizable (custom pages created in CRM Application Composer are customizable by default)	JDeveloper	JDeveloper	Yes	<a href="#">Section 17.2, "Allowing Pages to be Personalized by End Users in Oracle Composer"</a>
Customize onscreen hoover help text	Oracle Composer	Business Analyst	Yes	<a href="#">Section 18.3, "Customizing or Adding Bubble Embedded Help"</a>
Customize onscreen help text	JDeveloper	Developer	Yes	<a href="#">Section 18.4, "Customizing or Adding Static Instructions, In-field Notes, and Terminology Definitions"</a>
Change the look and feel of the entire application	JDeveloper	Developer	No	You can choose the skin you want Oracle Fusion Applications to use. For more information, see "Chapter 17 Implementing Skinning" of the <i>Oracle Fusion Applications Developer's Guide</i> .

**Table 1–1 (Cont.) Customization Scenarios in Oracle Fusion Applications**

<b>Customization/ Extension</b>	<b>Tool</b>	<b>Type of User</b>	<b>MDS?</b>	<b>Where to Find Information</b>
Translate custom text	JDeveloper	Developer	Yes	<a href="#">Chapter 16, "Translating Custom Text"</a>
<b>Business Objects</b>				
Customize business objects	JDeveloper	Developer	Yes	<a href="#">Section 11.2, "Editing Existing Business Components"</a>
Customize business objects (CRM)	CRM Application Composer	Business Analyst	Yes	<a href="#">Section 4.2, "Editing Objects"</a>
Add an attribute to a business object using flexfields (not CRM)	Setup and Maintenance work area	Business Analyst	No	<a href="#">Chapter 5, "Using Flexfields for Custom Attributes"</a>
Create business objects	JDeveloper	Developer	Yes	<a href="#">Section 11.5, "Creating Custom Business Components"</a>
Create business object (CRM)	CRM Application Composer	Business Analyst	Yes	<a href="#">Section 4.4, "Creating Custom Objects"</a>
Add business object page to Navigator menu	Setup and Maintenance work area	Business Analyst	No	<a href="#">Chapter 6, "Customizing the Navigator Menu"</a>
Add custom business object work area pages to Navigator menu (CRM)	CRM Application Composer	Business Analyst	No	<a href="#">Section 4.4, "Creating Custom Objects"</a>
Add validation to an object	JDeveloper	Developer	Yes	<a href="#">Section 11.5, "Creating Custom Business Components"</a>
Add validation to an object (CRM)	CRM Application Composer	Business Analyst	Yes	<a href="#">Section 4.2, "Editing Objects"</a>
Customize saved search for a custom object (CRM)	CRM Application Composer	Business Analyst	Yes	<a href="#">Section 4.5, "Creating and Editing Search Objects"</a>
Create search for an object	JDeveloper	Developer	Yes	<a href="#">Section 11.8, "Customizing or Creating a Custom Search Object"</a>
Create saved search for a custom object (CRM)	CRM Application Composer	Business Analyst	Yes	<a href="#">Section 4.5, "Creating and Editing Search Objects"</a>
Customize task flows for an object	JDeveloper	Developer	Yes	<a href="#">Section 11.3, "Editing Task Flows"</a>
Create task flows for an object	JDeveloper	Developer	Yes	<a href="#">Section 11.6, "Creating Custom Task Flows"</a>
Customize object workflows for an object (CRM)	CRM Application Composer	Business Analyst	Yes	<a href="#">Section 4.2, "Editing Objects"</a>
Create object workflows for an object (CRM)	CRM Application Composer	Business Analyst	Yes	<a href="#">Section 4.4, "Creating Custom Objects"</a>
<b>Business Processes</b>				
Create BPMN process in a BPM project	Business Process Composer	Business Analyst	Yes	<a href="#">Section 7.2, "Creating an Oracle BPM Project"</a>

**Table 1–1 (Cont.) Customization Scenarios in Oracle Fusion Applications**

Customization/ Extension	Tool	Type of User	MDS?	Where to Find Information
Create BPMN approval process in a BPM project (CRM)	CRM Application Composer	Business Analyst	Yes	<a href="#">Section 7.2, "Creating an Oracle BPM Project"</a>
Customize custom BPM projects	Business Process Composer	Business Analyst	Yes	<a href="#">Section 7.3, "Customizing BPMN Processes"</a>
Customize custom BPM projects (CRM)	CRM Application Composer	Business Analyst	Yes	<a href="#">Section 7.3, "Customizing BPMN Processes"</a>
Customize BPM project templates	Oracle BPM Studio	Developer	Yes	<a href="#">Chapter 13, "Customizing and Extending Oracle BPM Project Templates"</a>
Customize BPEL process or Mediator component, or add additional SOA components	JDeveloper	Developer	Yes	<a href="#">Section 12.4, "Extending or Customizing Custom SOA Composites"</a>
Customize task routing rules, business rules, DVM and, composite properties	Oracle BPM Worklist, Oracle SOA Composer and Oracle Enterprise Manager Fusion Applications Control	Developer	Yes	<a href="#">Section 12.2, "Customizing SOA Composites"</a>
<b>Reports</b>				
Create report layout	Oracle Business Intelligence Publisher	Business Analyst	No	<a href="#">Section 8.2.2, "Customizing Layouts"</a>
Customize report layouts	Oracle Business Intelligence Publisher	Business Analyst	No	<a href="#">Section 8.2.2, "Customizing Layouts"</a>
Customize style templates	Oracle Business Intelligence Publisher	Business Analyst	No	<a href="#">Section 8.2.2, "Customizing Layouts"</a>
Create a report	Oracle Business Intelligence Publisher	Business Analyst	No	<a href="#">Section 8.2.4, "Creating Custom Reports"</a>
Translate a report	Oracle Business Intelligence Publisher	Business Analyst	No	<a href="#">Section 8.2.5, "Adding Translations"</a>
Create report subject area (CRM)	CRM Application Composer	Business Analyst	No	<a href="#">Section 4.4, "Creating Custom Objects"</a>
<b>Enterprise Scheduler Jobs</b>				
Create Jobs	JDeveloper	Developer	No	<a href="#">Chapter 14, "Customizing and Extending Oracle Enterprise Scheduler Jobs"</a>
<b>Security</b>				
Adding data security to custom object	Setup and Maintenance work area	Developer	No	<a href="#">Section 15.4, "Defining Data Security Policies on Custom Business Objects" and Section 15.5, "Enforcing Data Security in the Data Model Project"</a>

**Table 1–1 (Cont.) Customization Scenarios in Oracle Fusion Applications**

Customization/ Extension	Tool	Type of User	MDS?	Where to Find Information
Adding function security to custom object	JDeveloper	Developer	No	<a href="#">Section 15.6, "Defining Function Security Policies for the User Interface Project"</a>
Adding security to custom object (CRM)	CRM Application Composer	Business Analyst	No	<a href="#">Section 9.2, "Defining Security Policies for Custom Business Objects"</a>
Enabling end users to set instance level security	CRM Application Composer	Business Analyst	No	<a href="#">Section 9.3, "Enabling End User Instance-Level Security Customization"</a>

### 1.3.2 Installing Customization Tools

All the business analyst tools are available from the Navigator menu of Oracle Fusion Applications. However, developers will need to install and configure JDeveloper. Once installed, they will need to set up their environment for customization and extending.

For procedures for installing JDeveloper and setting it up for extending (that is, for creating new objects), see the "Setting Up Your Development Environment" and "Setting Up for JDeveloper Workspace and Projects" chapters in the *Oracle Fusion Applications Developer's Guide*.

For procedures for setting up JDeveloper for customizations, see [Chapter 10, "Using JDeveloper for Customizations."](#)

---

## Understanding the Customization Development Lifecycle

This chapter discusses the typical workflow for customizing Oracle Fusion Applications.

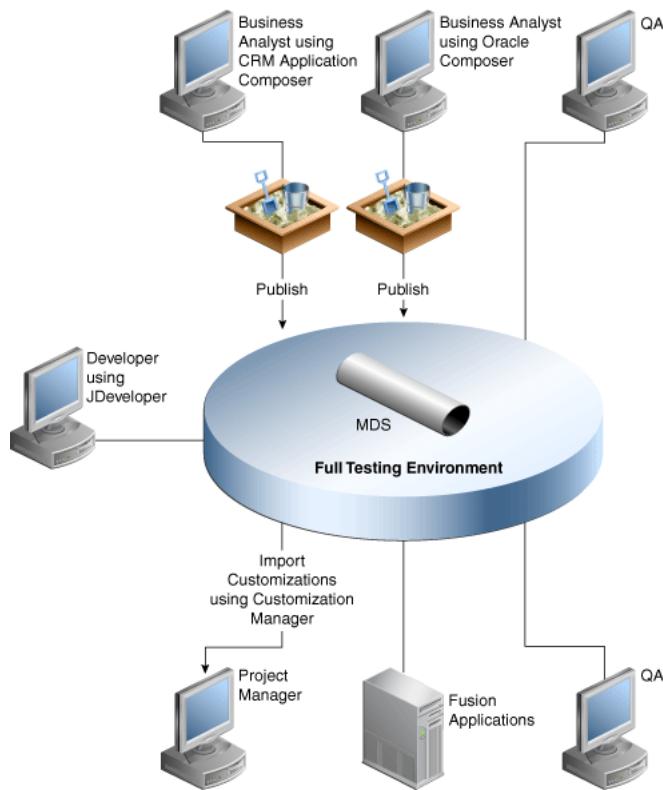
This chapter contains the following sections:

- [Section 2.1, "Understanding Typical Customization Workflows"](#)
- [Section 2.2, "Using the Sandbox Manager"](#)
- [Section 2.3, "Using Customization Manager to Manage Runtime Customizations"](#)

### 2.1 Understanding Typical Customization Workflows

All customizations and extensions, whether done by analysts or developers should be done in a testing environment. Typically, this environment contains one or more Oracle Fusion Applications that will then be moved to a production environment, once all customizations and extensions are complete and tested. Business analysts using Oracle Composer and CRM Application Composer can do their customizations in sandboxes that can be test only (that is, the code in the sandbox is for testing only, and is never deployed), or they can be done in a sandbox that is then published to the environment. Developers using design time tools, such as JDeveloper, deploy their customizations either directly to that environment, or they can publish to a sandbox. Project managers can monitor the customizations, and can also import and export customizations. The entire environment with all customizations can then be tested, as shown in [Figure 2–1](#).

**Figure 2–1 Customizations are Done in a Test Environment That Runs Oracle Fusion Applications**



**Tip:** When you extend Oracle Fusion applications, you may want those extensions to be configurable using Oracle Fusion Functional Setup Manager. For more information about creating setup flows for extensions, see the Oracle Fusion Applications Information Technology Management, Implement Applications Developer Guide.

### 2.1.1 Typical Runtime Workflow

CRM Composer and Oracle Composer make use of sandboxes. Sandboxes allow customizers to make their changes in a segregated environment. Sandboxes keep the customization XML files stored in an MDS repository that is only available when you choose to work in that particular sandbox (this repository is separate from the repository that holds customizations). For example, you might create a sandbox named MySandbox. When you go to make your customizations, you would first choose to do so within MySandbox. If you want other users to be able to see the customizations, they can then also use MySandbox, and the customizations will be there.

---

**Note:** There are restrictions for when more than one user is working in a sandbox. For more information, see [Section 2.2.1, "Sandboxes and Concurrent Usage."](#)

---

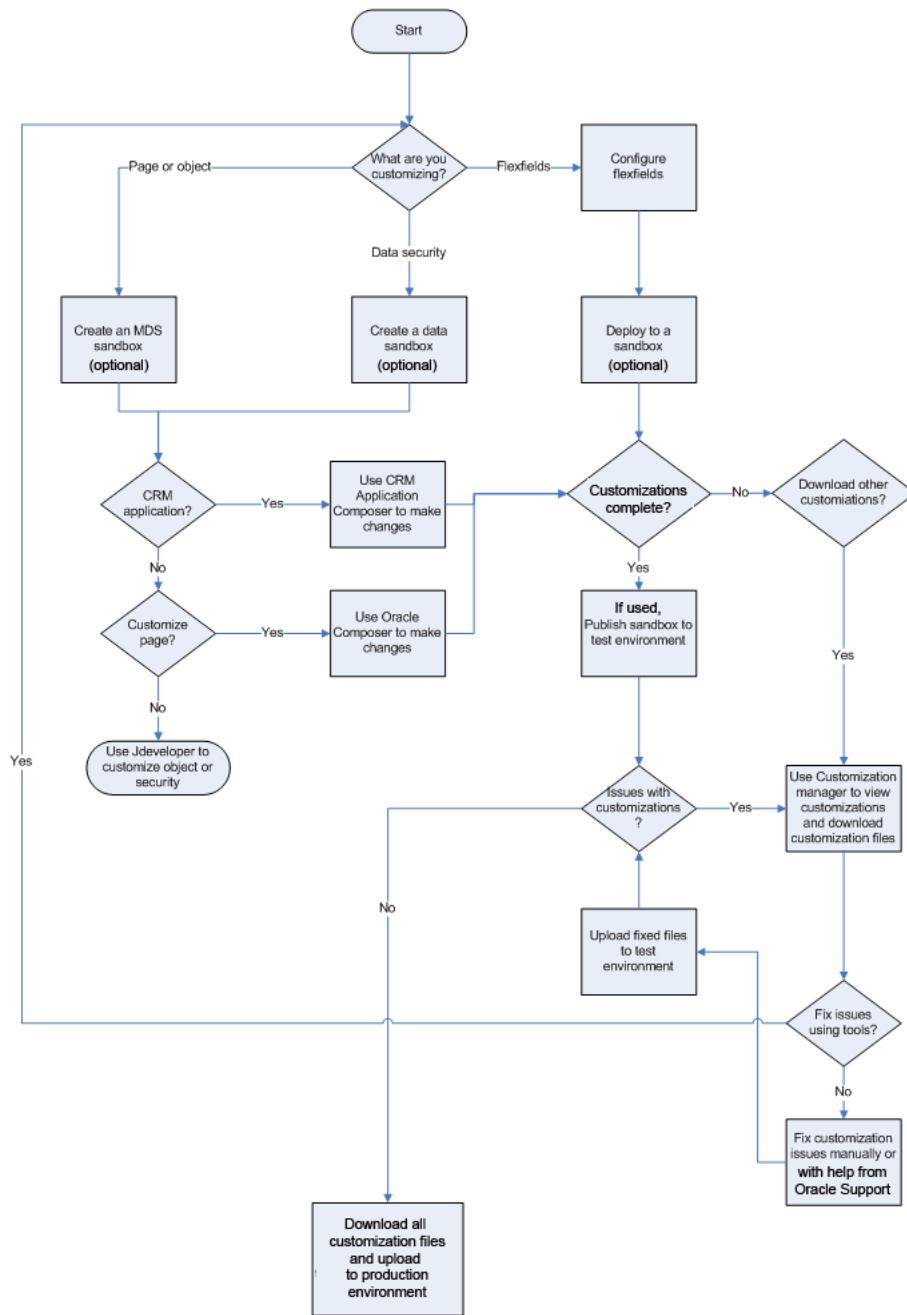
You can also create a sandbox when you create security policies for custom objects that you have created using CRM Application Composer. These security sandboxes create new database tables to store the security information, and these tables are only available when you choose to work in that sandbox.

Once customizations in a sandbox are complete, the sandboxes can be reviewed and approved by others, and once approved, published to the full test environment where they become part of that repository. For more information about sandboxes, see [Section 2.2, "Using the Sandbox Manager."](#)

For flexfields, if you want to test the flexfield configuration before deploying it to the full test environment, you can deploy the flexfield to a flexfield sandbox. The changes that you deploy to a sandbox are isolated from the full test environment and can only be seen by those who make the flexfield sandbox active in their session. Once you are satisfied with the changes in the sandbox, you can deploy the changes to the full test environment.

When a sandbox is published, it is labeled. Labeling can act as a save point, meaning that if a future customization causes issues, you can use Customization Manager to promote the last known good label back to the tip (thereby removing all customizations done after that point). You can also use Customization Manager to view others' customization metadata files, and to download those files to manually move them to another environment or to diagnose any issues. You can also upload others' customization metadata files to your environment. For more information, see [Section 2.3, "Using Customization Manager to Manage Runtime Customizations."](#)

[Figure 2–2](#) shows the flow for a typical runtime customization process. Note that because customizing the Navigator menu, BPMN process flows, and reports does not use the MDS repository, customization of those artifacts is not shown in the flow. Refer to the corresponding chapters for those processes for more information.

**Figure 2–2 Typical Runtime Customization Workflow**

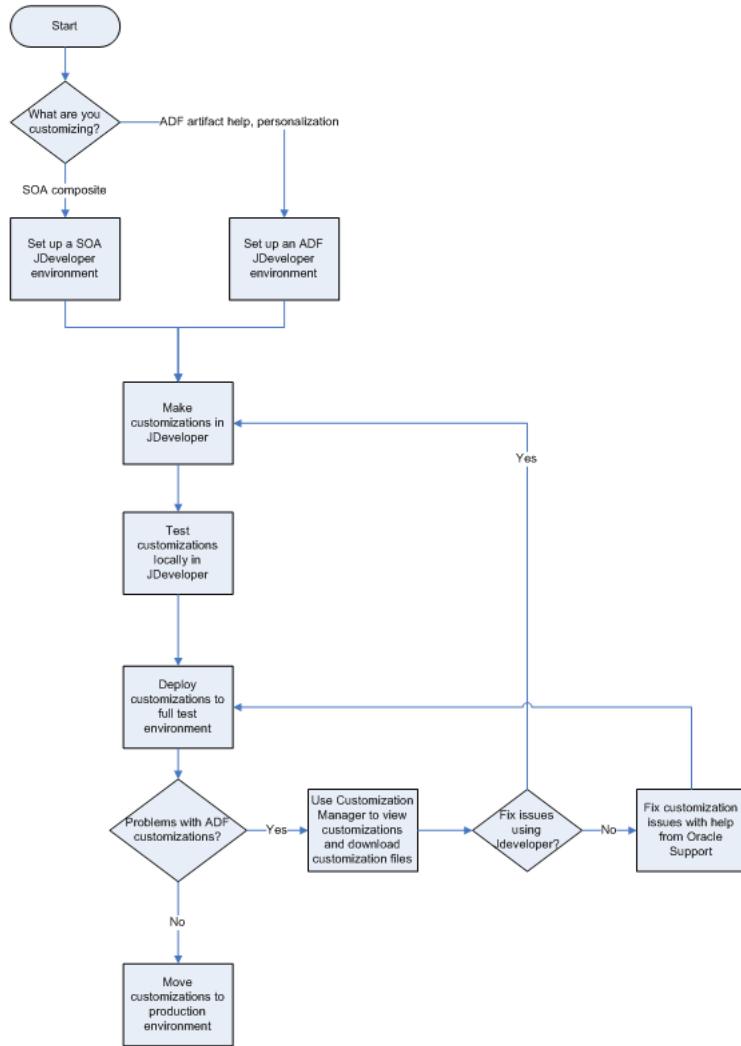
## 2.1.2 Typical Design Time Workflow

When your customizations cannot be done using a runtime tool, you often need to use JDeveloper to make your changes. Once you create your customizations, you can test them locally in JDeveloper, and when complete, deploy them directly into the full test environment. You can also deploy your customizations to a sandbox (security customizations done at design time are not saved to a sandbox). Additionally, you can use source control software to manage these changes. For more information about what source control software JDeveloper supports, see the "Versioning Applications with Source Control" topic of the JDeveloper online help.

Because your changes (other than security changes) are stored in customization files in MDS, these changes can also be viewed and managed using Customization Manager. However, they cannot be promoted as the customizations made in Oracle Composer can be. You need to undeploy changes that are causing issues, fix the issues, and then redeploy to the test environment.

[Figure 2–3](#) shows the flow for a typical design time customization process.

**Figure 2–3 Typical Design Time Customization Workflow**



## 2.2 Using the Sandbox Manager

You can make changes to an application at runtime in a sandbox so that the changes are isolated from the mainline. The mainline is a branch of data that serves as a single source of truth. Once you are satisfied with the changes in the sandbox and want to commit the changes, you can publish the MDS or security-enabled sandbox to the mainline. Flexfield sandboxes are for testing only and cannot be published. You make flexfield configurations that are stored in a database and then you can deploy those configurations to a sandbox to see the resulting deployment artifacts in a sandbox environment. Flexfields are deployed directly to the mainline using the flexfield UI.

For more information about flexfields, see [Section 5.6, "Deploying Flexfield Configurations."](#)

You can use runtime tools to customize the application. The sandbox manager works with CRM Application Composer and Oracle Composer to customize objects and pages.

- For information about using CRM Application Composer, see [Chapter 4, "Customizing Objects."](#)
- For information about using the Oracle Composer, see [Chapter 3, "Customizing Existing Pages."](#)

Oracle Business Process Composer and Oracle SOA Composer are also runtime customization tools, but do not use the sandbox manager. They have their own mechanisms for handling customization changes.

- For information about using Oracle Business Process Composer, see [Chapter 7, "Customizing and Extending BPMN Processes."](#)
- For information about using SOA Composer, see [Chapter 12, "Customizing and Extending SOA Components."](#)

To customize an Oracle Fusion application, you first create a sandbox and then use Oracle Composer or CRM Application Composer to make the customizations. These changes will be contained within the sandbox so they don't affect the mainline. You then test and validate the changes by publishing the sandbox to the full test environment. After the application has been tested, it can then be moved to the production environment where the customization changes will be available to users of the system.

The sandbox manager is a tool for managing the different types of customization changes that can be applied to an application. The different types of sandboxes are:

- Metadata  
The metadata sandbox supports making changes to the application's metadata stored in the MDS.
- Security  
The security-enabled sandbox supports making data security changes.
- Flexfield  
The flexfield sandbox is not created in the sandbox manager. You would use the flexfield UI to make changes to the flexfields and then deploy the flexfield to the sandbox. The flexfield deployment process manages the creation of the sandbox. For more information about flexfields, see [Section 5.6, "Deploying Flexfield Configurations."](#)

With the exception of security, the sandboxes created using the sandbox manager are also available in JDeveloper when you use JDeveloper to create and deploy customizations intended for a deployed Oracle Fusion application in WebLogic Server. The available sandboxes will appear in a selection list in JDeveloper during deployment. For more information, see [Section 11.11, "Deploying ADF Customizations and Extensions."](#)

In CRM Application Composer, when users want to customize security, they can do so using a sandbox specifically for editing security policies. When the user enables the security sandbox, the operation will duplicate the schema for Oracle Fusion Data Security tables and is therefore a lengthy setup operation. Before users enable the security sandbox, they should wait until they are ready to make security policy

customizations. The security policy customizations that users publish from a sandbox will be merged into the Oracle Fusion security policy repository as part of the native application and overwrite any previous customizations. Because inconsistencies can result when multiple users edit the security policies associated with the same object in different sandboxes, users should coordinate so they avoid editing the same object concurrently.

The metadata and security sandbox sessions can be saved and be downloaded as a file to be imported into other Oracle Fusion applications.

## 2.2.1 Sandboxes and Concurrent Usage

In the customization runtime workflow, sandboxes are used to isolate the changes from the mainline for testing and validating. After you are satisfied with the changes, you can publish the changes back to the mainline. You can also create sandboxes for testing purposes only, and not publish them.

There are two types of sandboxes:

- Sandboxes intended to be published.

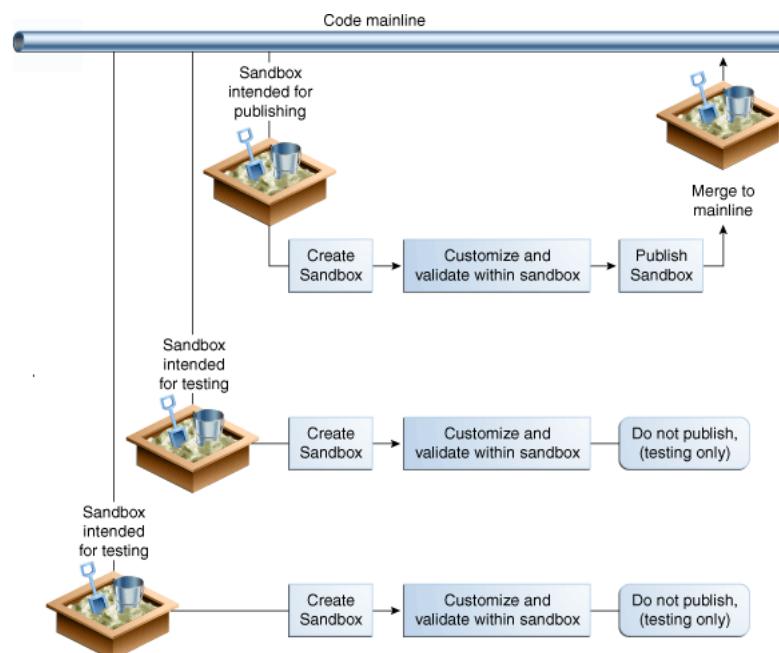
These sandboxes will be merged back to the mainline code.

- Sandboxes intended for "test-only" purposes.

These "test-only" sandboxes will not be published and therefore produce no concurrency conflicts between sandboxes. You can have many "test-only" sandboxes at the same time. But if you have multiple users working on the same "test-only" sandbox, they will still need to adhere to the guidelines described in [Section 2.2.1.1, "Guidelines for One Sandbox, Multiple Users."](#)

[Figure 2–4](#) illustrates the two types of sandboxes and their relationship to the mainline.

**Figure 2–4 The Two Types of Sandbox Usages**



An application artifact typically includes several metadata files. Therefore, creating or editing an artifact usually means making changes, whether directly or indirectly, to more than one file. Some of these metadata files may be shared between artifacts.

When multiple users can customize an application using sandboxes, there are two types of concurrency conflicts:

- Conflicts within a sandbox: Users overwriting changes created by other users, either directly by changing the same artifact, or indirectly by affecting files that are shared between the artifacts.
- Conflicts between sandboxes (intended for publishing only): Multiple sandboxes with the same customized artifact publishing to the mainline.

---

**Note:** Because many customization scenarios, including customizing security policies, involve editing the same underlying artifacts, the only way to be certain of eliminating the possibility of any concurrency conflicts is to allow only one user at a time in an active sandbox. If you must have multiple users or multiple sandboxes, you should adhere to the usage guidelines described in [Section 2.2.1.1, "Guidelines for One Sandbox, Multiple Users,"](#) and [Section 2.2.1.2, "Guidelines for Multiple Sandboxes, Multiple Users."](#)

---

Conflicts within a sandbox can arise when multiple users are customizing an application using the same sandboxes at the same time, because more than one user may be attempting to customize the same artifact, or performing a customization task that indirectly affects other shared files. An example of a direct conflict is when different users attempt to customize the same page, the same fragment, or the same metadata file in the same layer. An example of an indirect conflict is when two users, each creating their own object, cause a conflict in the metadata file that tracks which new objects have been created by both saving their changes around the same time.

Conflicts may also arise when users are editing a shared artifact, such as when a user performs an operation that adds or edits a translatable string. For example, a user edits a field's display label or help text, or a validation rule's error message, while another user performs an operation around the same time that similarly affects translatable strings. Another example of a shared artifact conflict is when two or more users are working in navigator menus which are shared across applications.

When you are using Oracle Composer, although you are not required to, you should use a sandbox. Oracle Composer provides concurrency warning messages when there is a potential customization conflict with another user. For Oracle Composer, these warning messages help prevent conflicts. For more information, see the "Editing Pages" section of the *Oracle Fusion Middleware User's Guide for Oracle WebCenter Spaces*.

When you are using CRM Application Composer, you should always use a sandbox. CRM Application Composer provides error messages when a concurrency conflict is encountered. If multiple users in a single sandbox attempt to edit the same artifact, an error message is displayed. For example, if two users are editing the label of the same attribute, CRM Application Composer will display an error message.

Conflicts between sandboxes can arise when there is more than one sandbox intended for publishing in use. If two sandboxes contain customization changes to the same artifact and both are being published, the sandbox that is being published last is given an option (by the sandbox manager) to overwrite the changes for that artifact from the sandbox that was published first. If the user working in the second sandbox decides to force-publish the second sandbox, it will overwrite the changes published by the first

sandbox. These types of conflicts can also occur with shared metadata files such as resource bundles that store translatable strings.

If there is a concurrent change made in the mainline code after the sandbox was created and the user attempts to publish that sandbox, such conflicts are detected at publish time and errors are raised.

### 2.2.1.1 Guidelines for One Sandbox, Multiple Users

Regardless of whether the sandbox is intended for publishing or whether it is for "test-only," if you need to have multiple users working in a single sandbox, you should follow these usage guidelines:

- Multiple concurrent users in the same sandbox should operate only on different and unrelated objects.

For example, if user1 updates object1, then user2 can update object2 but should not update object1. Be aware that if both modifications involve changes to translatable strings, then saving changes to separate objects around the same time may still cause a conflict in the resource bundle that stores the translatable strings.

- If multiple users do update the same artifact concurrently (either the same object or the same underlying frequently modified file), they will get a concurrent update error. In this case, the second user's changes will not be saved (the **Save** button will be disabled) and one of the users will have to cancel and try again.

CRM Application Composer will retain any uncommitted changes in the UI. For example, if the user were editing a groovy expression when the error was encountered, the expression will be retained in the editor so the user can copy and paste the expression to try customizing again. (No metadata corruption or partial transaction commits will happen.)

- Users in the same sandbox will see the changes created by one another. The latest version of each object gets loaded on-demand the first time it is viewed in CRM Application Composer. Users can refresh their view to the latest definition from MDS and see the changes listed in the tree structure at the left side of the CRM Application Composer UI. However, if there are ADF Business Components customizations, users may need to log out and log back in again to see those changes reflected in the UI.

### 2.2.1.2 Guidelines for Multiple Sandboxes, Multiple Users

If you need to have multiple users working in multiple sandboxes, you should follow both the guidelines in [Section 2.2.1.1, "Guidelines for One Sandbox, Multiple Users,"](#) and these usage guidelines:

- There can be any number of "test-only" sandboxes operating concurrently. That is, multiple users can use multiple sandboxes concurrently for testing if these sandboxes will never be published. Sandboxes that are used for testing only, and that are not published, cause no conflicts with each other. Be aware, however, that all modifications will be lost when the sandboxes are destroyed.

---

**Note:** Even though sandboxes that are for "test-only" cause no conflicts with each other because they are not published, multiple users who work in the same "test-only" sandbox still need to follow the guidelines in [Section 2.2.1.1, "Guidelines for One Sandbox, Multiple Users."](#)

---

- For sandboxes that are not for "test-only" and that will be published, you can have multiple concurrent sandboxes only if they operate on mutually exclusive artifacts. For example, you can have one sandbox that contains a page that is being customized to add a task flow, and another sandbox that contains a different page from a different application.

---

**Note:** For CRM Application Composer, you should have only one sandbox that is intended for publishing at a time. You cannot have multiple concurrent sandboxes that are intended for publishing. You can still have other sandboxes that are for "test-only."

---

- If an artifact is updated in both the mainline and in the sandbox (or two different sandboxes), when the sandbox is published, such conflicts are detected and an error is raised. At this point, administrators should cancel the publishing of the sandbox to avoid overwriting previous changes.

---

**Note:** For a sandbox that contains ADF Business Components customizations, you should log out and log back in again after switching in or out of this sandbox to avoid any inconsistencies between the runtime caches and the ADF Business Components definitions.

---

## 2.2.2 Setting Up Sandboxes

When you create a sandbox, the currently available metadata is gathered into a sandbox session. You designate a sandbox to be the active sandbox by choosing either the newly created sandbox or select from a list of existing sandboxes in a table. The active sandbox is the context for all changes. Once activated, you can make customization changes to the application artifacts and these changes will be stored in the sandbox. The sandbox uses a database to store the actual change information. After you are satisfied with the changes, you can publish the sandbox, or deploy the flexfield, and the changes will be merged into the mainline and the sandbox archived.

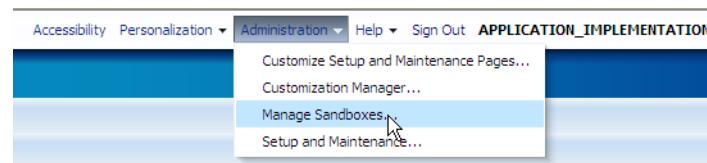
### To set up a sandbox:

- Access the sandbox manager.

For non-flexfield sandboxes, you can access the sandbox manager by selecting the **Manage Sandboxes** menu item from the **Administration** menu in the global area of Oracle Fusion Applications.

Figure 2–5 shows the Manage Sandboxes menu selection from the Administration dropdown.

**Figure 2–5 Accessing the Sandbox Manager**

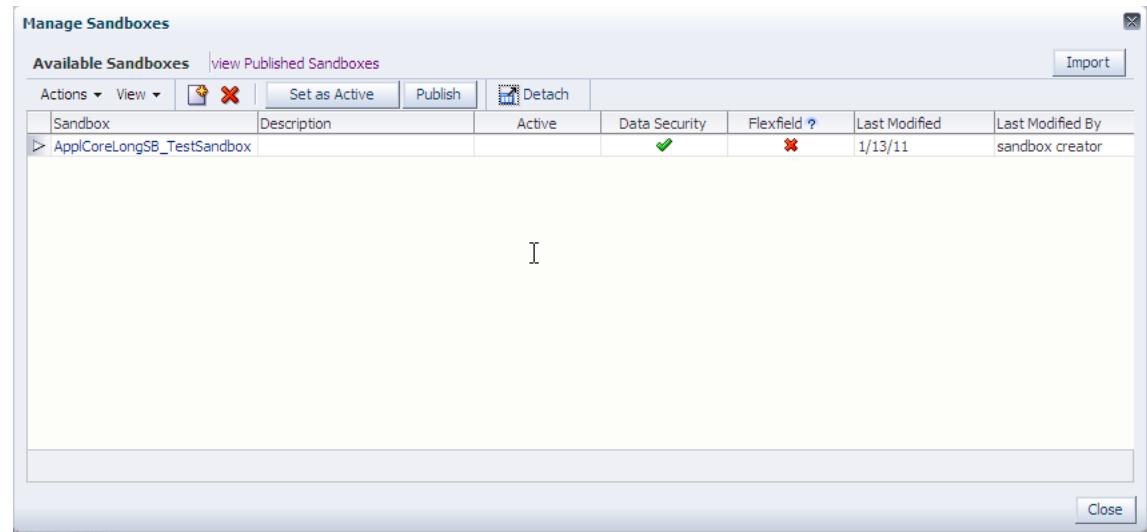


For flexfields, you need to be in the flexfield UI and then select the **Deploy Flexfield to Sandbox** menu item to deploy the customizations to a flexfield

sandbox. Flexfield changes are stored in flexfield metadata in the mainline database and are only available to users when the flexfield is deployed, as described in [Section 5.6, "Deploying Flexfield Configurations."](#) Thus for flexfields, the remaining tasks in this procedure do not apply.

2. In the Manage Sandboxes dialog, you can create a new sandbox, select from a list of sandboxes in the Available Sandboxes page, import a sandbox as a file, or perform other sandbox functions. [Figure 2–6](#) shows a Manage Sandbox dialog with one available sandbox.

**Figure 2–6 Manage Sandboxes Dialog**



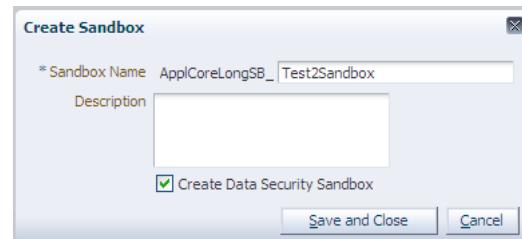
3. Create a new sandbox by clicking the **New** icon or selecting **Actions > New**.
4. In the Create Sandbox dialog, enter a name for the sandbox. If you want a security-enabled sandbox, select **Create Data Security Sandbox** and click **Save and Close**. [Figure 2–7](#) shows the dialog with security enabled.

---

**Note:** Because setting up the security sandbox requires duplicating the schema for Oracle Fusion Data Security tables, this will always be a lengthy operation in CRM Application Composer. Be sure to allow sufficient time for the process to complete and do not terminate it early. You may want to defer customizing security and enabling the security sandbox until you are sure that you need to make customizations.

---

**Figure 2–7 Create Sandbox Dialog**

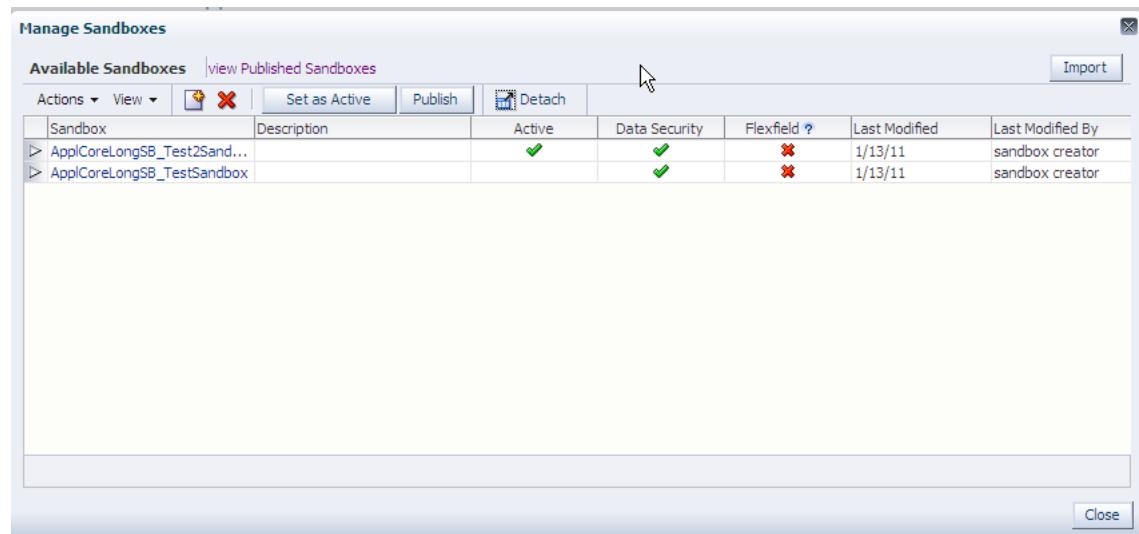


You will see a confirmation dialog when the sandbox has been successfully created. Click **OK** to dismiss the dialog.

5. Set the active sandbox. You can make the newly created sandbox or an existing sandbox the active sandbox.

In the Manage Sandboxes dialog, in the Available Sandboxes page, select the sandbox you want to make active and click **Set as Active** as shown in [Figure 2–8](#).

**Figure 2–8 Manage Sandboxes Dialog**



Only one sandbox can be active at one time. The customization changes are captured in the active sandbox.

6. Export a sandbox.

A sandbox can be exported as a file for transporting, sharing, and other usages where packaging it as a file is required. Consequently, a sandbox exported as a file can be imported.

In the Sandbox Details dialog, click **Download All**. Enter the location and file name for the exported sandbox.

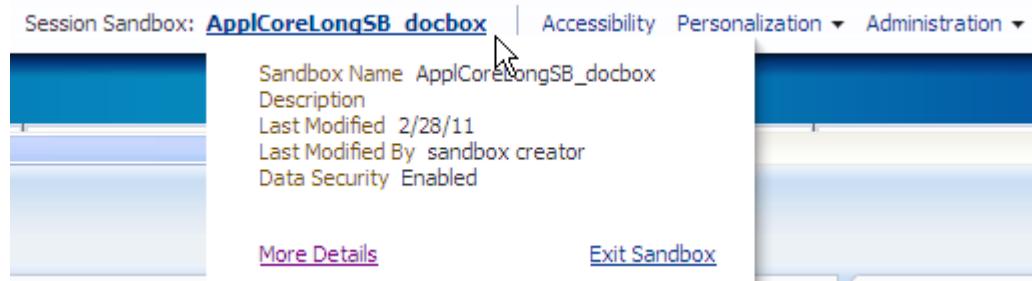
7. Import a sandbox.

In the Manage Sandboxes dialog, click **Import**.

In the Import dialog, click **Browse** to navigate to the file or enter the fully qualified file name.

8. Exit the sandbox.

Mouse over the sandbox name next to the **Session Sandbox** label in the global area of the Oracle Fusion Applications to launch a popup dialog. Click **Exit Sandbox**.

**Figure 2–9** *Sandbox Popup Dialog*

In the Exit Sandbox dialog, click Yes.

**Figure 2–10** *Exit Sandbox Dialog*

### 2.2.3 Publishing Sandboxes

If there are changes to the mainline from another source and you publish your sandbox, the mainline is not overwritten. If there are conflicts, you will be warned and will be given a choice to fix the conflicts.

#### To publish a sandbox:

1. Make the customization changes to the application by going to the various customization environments. For example, you can create new objects and customize the objects in CRM Application Composer.

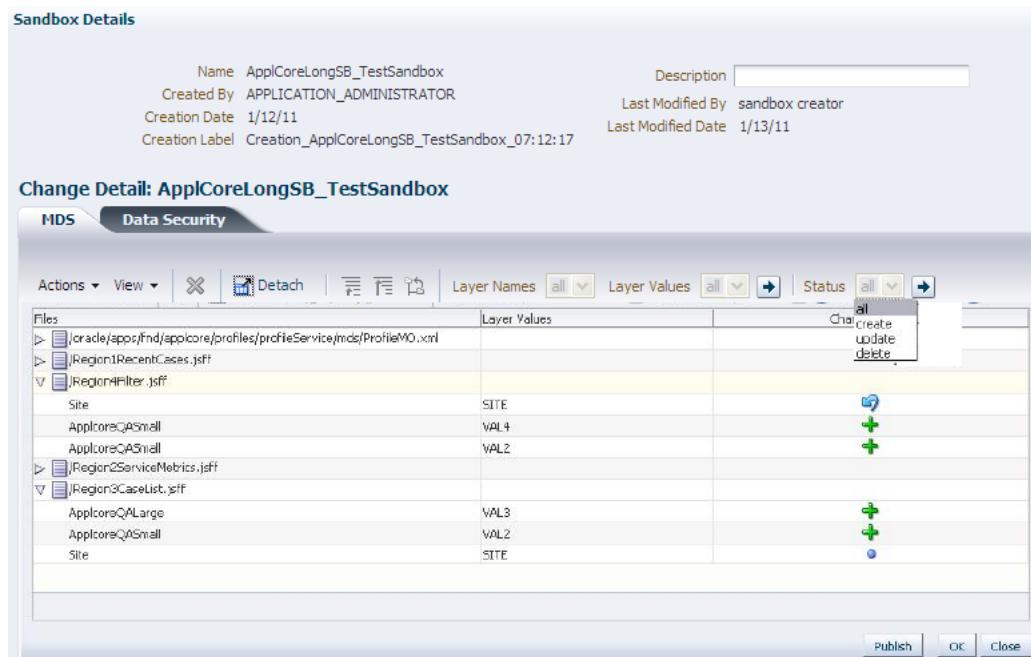
You can make metadata changes in the sandbox. Metadata changes are normally associated with MDS. These include making changes to a page, to ADF customization, and to ADF business objects. For more information about making changes to the page, see [Chapter 3, "Customizing Existing Pages."](#) For more information about making changes to business objects, see [Chapter 4, "Customizing Objects."](#)

You can make security changes by applying them to a security-enabled sandbox. You can test your security changes and policies before you publish the sandbox to commit the changes. For more information about customizing security policies, see [Section 9.2, "Defining Security Policies for Custom Business Objects."](#) For more information about custom business objects, see [Chapter 15, "Customizing Security for ADF Application Artifacts."](#)

2. Test or validate the changes in runtime using test or production systems and any combination of validation setups.

In the Manage Sandboxes dialog, click on the sandbox link to launch the Sandbox Details dialog. You can view the layers and objects where you have made customization changes, as shown in [Figure 2–11](#).

**Figure 2–11 Sandbox Details Dialog**



3. Publish the sandbox to the mainline.

After you are satisfied with the changes, select the sandbox and click **Publish** in the Manage Sandbox dialog or in the Sandbox Detail dialog to commit the changes to the mainline.

## 2.3 Using Customization Manager to Manage Runtime Customizations

When you have the correct privileges, you can use Customization Manager to view and diagnose customizations made for any page in an application. You can also use Customization Manager to move customizations to another environment, for example from one test environment to another.

**Tip:** For more information about privileges, contact your security administrator.

### 2.3.1 Before You Begin Using Customization Manager

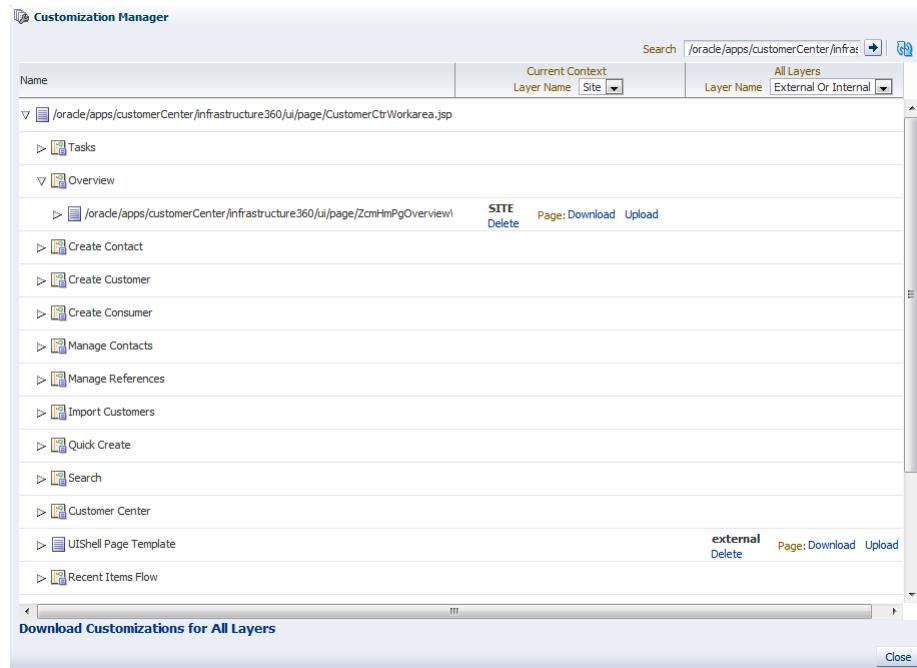
You need to do the following before you can use Customization Manager:

- You need to have specific privileges to access Customization Manager. Please contact your security administrator for details.
- To access Customization Manager, from Administration menu in the global area of Oracle Fusion Applications, choose **Customization Manager**

### 2.3.2 Viewing Customizations Using Customization Manager

Figure 2–12 shows Customization Manager with all artifacts related to the CustomerCtrWorkarea.jspx file.

**Figure 2–12 Customization Manager**



As shown, there has been a customization made to a page fragment file in the Site customization layer, and a customization made to the UIShell Page Template in the external layer. The customizations in the **Current Context** column show the customizations that the currently logged in user would see in a running version of the application. All customizations, including those the currently logged in user might not see (perhaps because of security policies), are listed in the **All Layers** column.

For example, say you are a customization developer. Because you as a user have been assigned a particular role, the page that you see will only display customizations appropriate for your role. Those customizations will be listed in the **Current Context** column (provided you chose the proper layer from the Layer Name dropdown menu). This helps you to determine what customizations are affecting what you are seeing. There may, however, be customizations you do not see. You can view those customizations from the **All Layers** column.

#### To view customizations:

1. Navigate to the page you wish to view customizations for.
2. From Administration menu in the global area of Oracle Fusion Applications, choose **Customization Manager**.

**Tip:** Once you are in Customization Manager window, you can change the page for which you are viewing customizations using the **Search** field.

3. Change the layer values for the **Current Context** and **All Layers** columns as needed. For more information about customization layers, see [Section 1.2, "Understanding Customization Layers."](#)

The **Current Context** column shows customizations affecting the page as the currently logged in user sees it. The **All Layers** column shows all customizations.

### 2.3.3 Downloading and Uploading Customization Files

As explained in [Section 1.2, "Understanding Customization Layers,"](#) customizations are stored in an XML file. You can download the XML file for a customization to your local machine. You may need to do this for the following reasons:

- You need to diagnose issues seen in the test environment.
- You need to send files to Oracle Support for further diagnosing.
- You want to import a customization into another environment. For example, a customization developer using JDeveloper may need to see customizations done by someone else.
- You need to migrate a customization into a production environment.

Once you download customizations, you may then need to upload the revised files back into the environment. Or you may need to upload customization files into a new environment using Customization Manager.

**Tip:** Customization Manager allows you to upload and download customization files for a given page at a time. If you need to upload or download customization files for multiple pages, then you can use WebLogic scripting tool commands or Fusion Middleware Control. For more information, see [Section 10.2.4, "Importing Customizations into Your Workspace."](#)

#### To download and upload customizations:

1. Navigate to the page for which you wish to download or upload customizations.
2. From Administration menu in the global area of Oracle Fusion Applications, choose **Customization Manager**.

**Tip:** Once you are in the Customization Manager window, you can change the page for which you are viewing customizations using the **Search** field.

3. To download a file, click the **Download** link for the corresponding customization. The file will be downloaded to your local machine.
4. To upload a file, click the **Upload** link for the corresponding customization. In the Upload Customization dialog, click **Choose File** and navigate to and select the appropriate file. Click **OK** to upload the file.

---

**Note:** The name of the file you upload must be the same as the name of the file you are replacing.

---

5. To download all customizations of the page for all layers, click the **Download Customizations for All Layers** link, located at the bottom of the window. This will download the `AllCustomization.zip` file, which contains all the customization XML files for the page.

### 2.3.4 Promoting a Customization to the Tip

When you save a customization in Oracle Composer, you can choose to save it to a label. You can think of a label as a "save point," that is, a point at which you know the customization works as expected. By having a label, if an issue occurs after the label, you can revert back to that label. To revert back to a label, you promote it to the tip.

---

**Note:** You can only promote customizations done in Oracle Composer. Customizations done in a sandbox are automatically labeled when the sandbox is published. For more information about using Oracle Composer, see [Chapter 3, "Customizing Existing Pages."](#) For more information about sandboxes, see [Section 2.2, "Using the Sandbox Manager."](#)

---

**To promote a customization to the tip:**

1. Navigate to the page you wish to view customizations for.
2. From Administration menu in the global area of Oracle Fusion Applications, choose **Customize *page\_name* Pages** to open the page in Oracle Composer.
3. In the tool bar, click **Customizations Manager**.
4. To promote a customization to the tip, click **Promote** for the corresponding artifact.
5. In the Promote Documents dialog, select the label that you want to promote to the tip and click OK.



# **Part II**

---

## **Business User Customizations and Extensions**

Part II contains the following chapters:

- [Chapter 3, "Customizing Existing Pages"](#)
- [Chapter 4, "Customizing Objects"](#)
- [Chapter 5, "Using Flexfields for Custom Attributes"](#)
- [Chapter 6, "Customizing the Navigator Menu"](#)
- [Chapter 7, "Customizing and Extending BPMN Processes"](#)
- [Chapter 8, "Customizing Reports and Analytics"](#)
- [Chapter 9, "Customizing Security for Custom Business Objects"](#)



# 3

---

## Customizing Existing Pages

This chapter describes how to use Oracle Composer to edit pages.

This chapter includes the following sections:

- [Section 3.1, "About Customizing Existing Pages"](#)
- [Section 3.2, "Editing a Page in Oracle Composer"](#)
- [Section 3.3, "Editing Component Properties in Oracle Composer"](#)
- [Section 3.4, "Editing the UI Shell Template Used by All Pages"](#)
- [Section 3.5, "Editing Pages in Oracle JDeveloper After Using Oracle Composer"](#)

### 3.1 About Customizing Existing Pages

The pages in Oracle Fusion applications provide content and functionality to users that enable them to complete their tasks (for example, learning about a product or service, keeping up with sales data, or submitting an order) as easily and efficiently as possible. Because different users have different needs, Oracle Fusion Applications enables you to customize pages to fit those needs using Oracle Composer. End users can use Oracle Composer to personalize pages (for example, reorganize content in dashboards to place the content they use most frequently at the top of the page). Administrative users can use Oracle Composer to customize pages in any layer of the application or to customize the UI shell template used by CRM applications (for example, to add a logo or contact information to the header and footer of the page).

#### 3.1.1 What You Can Do with Pages at Runtime

Business users can perform the following tasks in a runtime environment with Oracle Composer:

- Change a page layout
- Add task flows, portlets, documents, layout components, and other objects to a page
- Provide values for the properties associated with pages and the objects they contain

---

**Note:** Flexfields exist for many pages in Oracle Fusion applications. Flexfields allow you to add custom attributes to a page. However, you do not use Oracle Composer to configure flexfields. For more information using flexfields, see [Chapter 5, "Using Flexfields for Custom Attributes."](#).

---

- Wire pages, task flows, and portlets to each other

### 3.1.2 What You Cannot Do with Pages at Runtime

Business users cannot perform the following tasks in a runtime environment with Oracle Composer:

- Making a page personalizable

To make a page editable by end users, a developer must use Oracle JDeveloper to enable personalization. For more information, see [Section 17.2, "Allowing Pages to be Personalized by End Users in Oracle Composer."](#)

- Editing user interface text that is part of a skin

To edit user interface text that is part of a skin, a developer must use JDeveloper to change the resource bundle used by the skin. For more information, see "How to Apply Skins to Text" in *Oracle Fusion Middleware Web User Interface Developer's Guide for Oracle Application Development Framework*.

- Editing text that is part of the embedded help on the page

To edit text that is part of the embedded help on a page, a developer must use JDeveloper. For more information, see [Section 18.4, "Customizing or Adding Static Instructions, In-field Notes, and Terminology Definitions."](#)

- Changing ADF taskflows

To edit ADF taskflows, a developer must use JDeveloper. For more information, see [Chapter 11, "Customizing and Extending ADF Application Artifacts."](#)

- Changing ADF Business Components objects

To edit the ADF Business Components objects (for example, to add validation to an ADF Business Components object), a developer must use JDeveloper. For more information, see [Chapter 11, "Customizing and Extending ADF Application Artifacts."](#)

- Changing the UI shell template in a non-CRM application

For applications other than CRM, a developer must use JDeveloper to modify the UI shell template. For more information, see [Section 11.9, "Editing the UI Shell Template."](#)

- Changing CRM administrative pages (such as Set Up and Look Up Management)

To edit the CRM administrative pages, a developer must use JDeveloper.

- Adding a custom attribute to a page using the flexfield feature

If a flexfield exists on a page, you must use the appropriate manage flexfield task to add the custom attributes to the page before you can work with them in Oracle Composer. For more information, see [Chapter 5, "Using Flexfields for Custom Attributes."](#)

- Changing mobile web pages (pages built using Trinidad components for mobile clients)

To edit mobile web pages, a developer must use JDeveloper. For more information, see [Section 11.4, "Editing Pages."](#)

### 3.1.3 Before You Begin Customizing Existing Pages

Before you implement customizations in applications, you should be familiar with the Oracle Fusion application architecture that enables customization, as described in [Chapter 1, "Customizing and Extending Oracle Fusion Applications."](#) You should also understand the typical workflows for working with runtime customizations, as described in [Chapter 2, "Understanding the Customization Development Lifecycle."](#)

You will need to do the following before you can begin customizing existing pages:

- Confirm the page is customizable.

You can only customize pages if a developer has enabled customization for the page.

- Optionally, set up a sandbox.

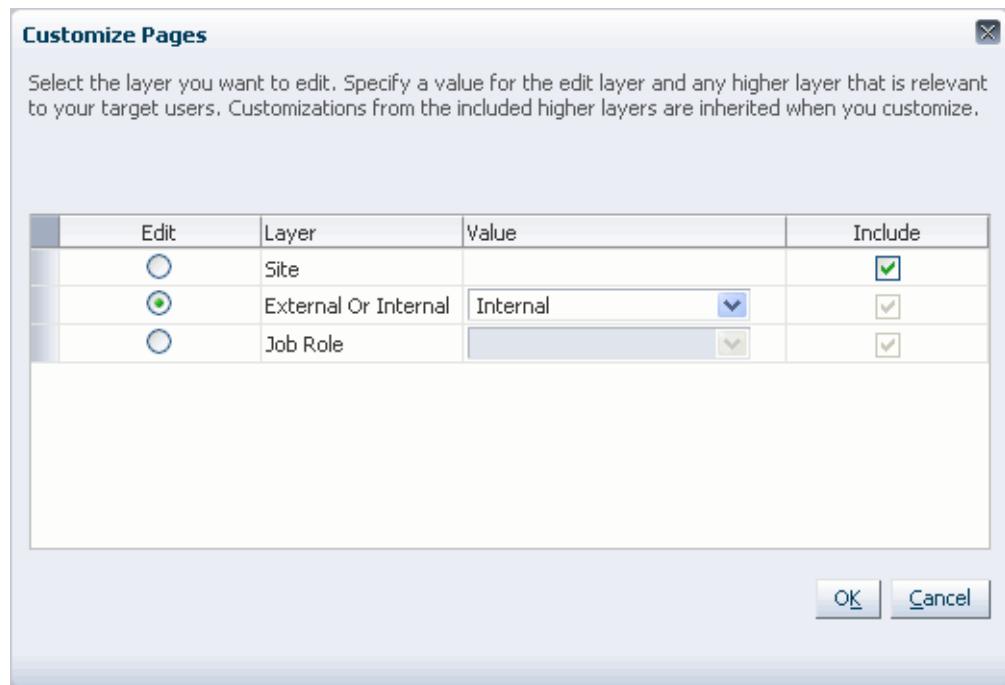
Oracle Composer can use sandboxes to manage your customizations. For more information, see [Section 2.2, "Using the Sandbox Manager."](#)

- Access Oracle Composer.

- To access Oracle Composer, navigate to the page you want to edit, then, from the **Administration** menu in the global area of Oracle Fusion Applications, choose **Customize page\_name Pages**.
- To customize existing pages, you will need the correct privileges. Contact your security administrator for details.

- If you have more than one layer available for customization, when you launch Oracle Composer, the IDE displays the Layer Picker dialog ([Figure 3-1](#)), which you use to specify the layer that you want to edit and its customization context. The layer that is selected in the **Edit** column is the layer you want to edit. The layers that are selected in the **Include** column will inherit any changes you make to the layer you edit.

**Figure 3-1 Layer Picker Dialog**



For more information on customization layers, including selecting a layer and customization context, see [Section 1.2, "Understanding Customization Layers."](#)

## 3.2 Editing a Page in Oracle Composer

This section provides an overview of the editing modes in Oracle Composer and describes how to perform basic editorial tasks, such as editing page components, changing the layout of the page, and the like.

Oracle Composer provides two views for working with page content:

- Design view provides a WYSIWYG rendering of the page and its content, where controls are directly selectable on each component. Design view enables administrators to:
  - Change page layout
  - Hide/show or move regions on a page
  - Edit region properties
  - Add content (such as task flows or components available through the resource catalog) to the page
- Source view provides a combined WYSIWYG and hierarchical rendering of page components, where controls are available on the header of the hierarchical list. Source view enables advanced users (such as developers or users with knowledge of ADF artifacts, JavaScript, and Expression Language (EL)) to:
  - Hide/show components
  - Move components using cut and paste
  - Edit properties of components that are not otherwise selectable in Design view (For example, many ADF Faces components can be edited only in Source view.)
  - Edit components within a task flow

For more information, see the section “Introducing Design View and Source View” in *Oracle Fusion Middleware User’s Guide for Oracle WebCenter Spaces*.

### Task: Add Components to a Page

You can add page components in Design view or in Source view (where UI widgets are available). In Design view, you place content using controls directly on the containing layout component. In Source view, you select the containing layout component and use the same set of controls in every case. You add components by selecting from the Resource Catalog, which provides access to a wide range of task flows, portlets, layout components, and other types of resources. For more information on adding components to a page, see the “Adding a Component to a Page” section in *Oracle Fusion Middleware User’s Guide for Oracle WebCenter Spaces*.

---

**Note:** If you want to display custom attributes, you may be able to use a flexfield that has been defined for the page. Flexfields are available for many pages in Oracle Fusion Applications, except for the CRM applications. For more information, see [Chapter 5, "Using Flexfields for Custom Attributes."](#)

---

### Task: Show and Hide Components on a Page

You can control whether to show or hide a component on a page. For example, you have a list of checkboxes, and if a user selects checkbox B, you want a button to display. You could set the Show Component property on the button to be an EL expression that says `#{if checkboxB.selected = true}`, meaning that if the selected value of checkbox B is “selected” then display the button.

There are two ways to hide a component: by changing the properties of the component or by changing the properties of the component’s container (such as a Box layout component). The first method is useful if you want to hide one or more components within a container, but want the container to show. The second method is useful if you want to hide a container and all its components.

The components within a container, for example, components in a Box layout component, are referred to as child components. You can hide the container and all its child components by changing the Display Option properties of the container. For more information, see the “Working with Component Display Options” section in *Oracle Fusion Middleware User’s Guide for Oracle WebCenter Spaces*.

You can hide individual child components by changing the Child Components properties of the container. For more information, see the “Hiding and Showing Child Components” section in *Oracle Fusion Middleware User’s Guide for Oracle WebCenter Spaces*.

### Task: Move Components on a Page

You move components on a page by cutting and pasting them in Source View, dragging and dropping them in Source or Design View, or, for components within a container (such as a Box layout component), by rearranging them on the **Child Components** tab in the Component Properties dialog for the container. You can move components on a page-by-page basis by editing the child component properties for a flexfield. For more information, see the “Rearranging Child Components” section in *Oracle Fusion Middleware User’s Guide for Oracle WebCenter Spaces*.

### Task: Delete Components from a Page

---

**WARNING:** You should only delete a component if you are positive that no other components or processes are dependent on the component you delete. We strongly suggest you instead hide a component if you are unsure.

---

If you are sure no other components or processes are dependent on a component, you can delete the component from a page by clicking the **Delete** icon in the component header.

---

**Note:** Some components might not be able to be deleted, such as mandatory or indexed fields or components that are installed as part of the Oracle Fusion Applications.

---

Furthermore, if you delete a layout component, such as a Box, all of the component’s children—that is, anything contained in the component—are also deleted. For example, if you delete a Box that contains multiple task flows, the Box and all of the task flow instances it contains are deleted. For more information, see the “Deleting Layout Components” section in *Oracle Fusion Middleware User’s Guide for Oracle WebCenter Spaces*.

### Task: Change the Layout of a Page

Page layout is defined by the number, placement, and orientation of content regions on a page. A page's initial layout style is selected when the page is created. Some style selections can be switched, even after you have added content to the page. Other style selections, notably the Blog and Web Page page styles, do not support mid-stream layout changes. For more information, see the "Changing Everyone's Page Layout" section in *Oracle Fusion Middleware User's Guide for Oracle WebCenter Spaces*.

### Task: Customize a Tasklist Menu

Task lists enable you to provide links to task flows in your application or Web pages outside your application. For example, you can add links to frequently used task flows, so that users can quickly perform the most common tasks.

---

**Note:** Task lists can be customized only at the site level.

---

1. If Source view is not already displayed, switch to Source view. From the **View** menu, select **Source**.
2. In the Design region (at the bottom of the page), click the task list as shown in [Figure 3–2](#).

**Figure 3–2 Selecting a Task List in the Design Region**

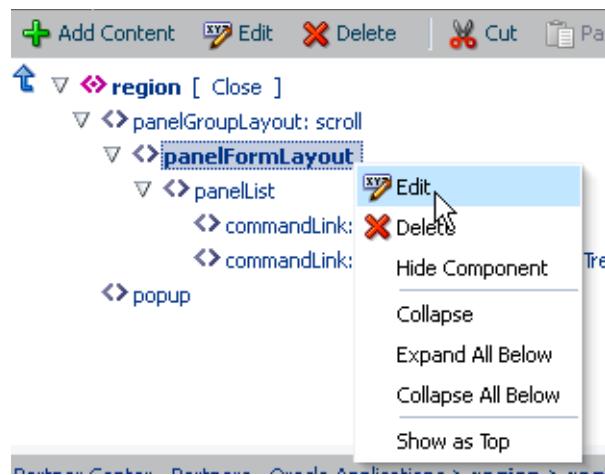


3. When asked to confirm that you want to edit the task flow, click **Edit**.
4. In the Source region, click Edit Task Flow next to the task list you want to edit as shown in [Figure 3–3](#).

**Figure 3–3 Opening the Task Flow Editor**

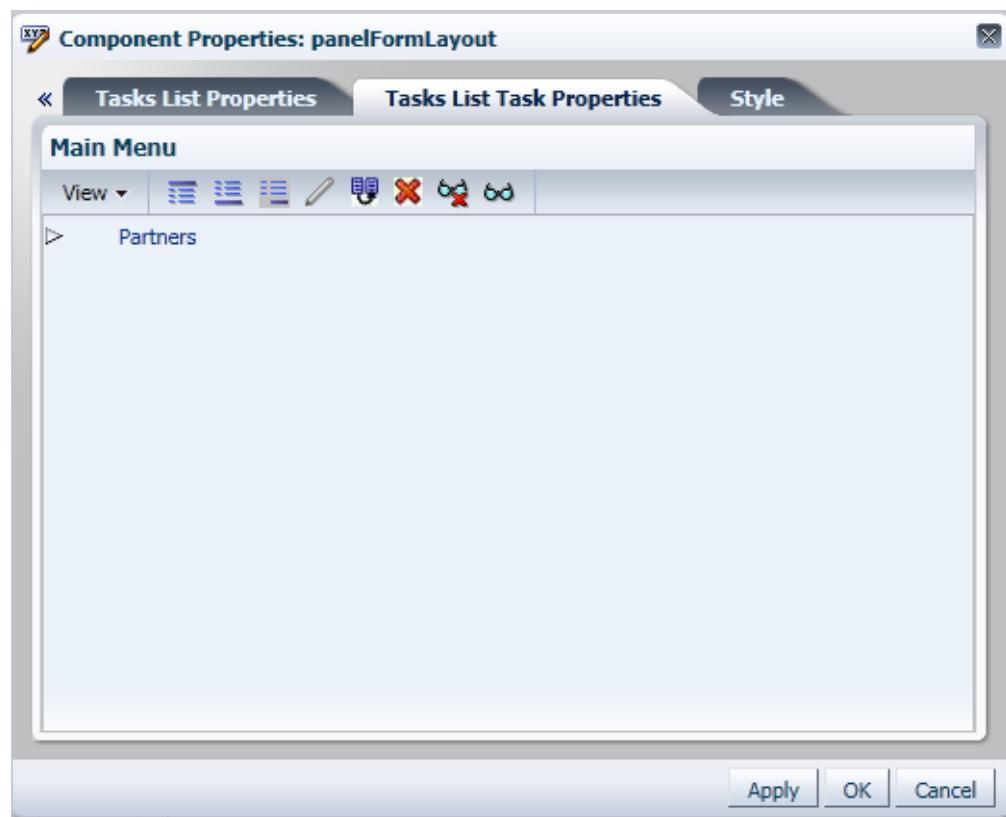


5. Again, when asked to confirm that you want to edit the task flow, click **Edit**.
6. In the Source region, right-click the panelFormLayout node, and select **Edit** as shown in [Figure 3–4](#).

**Figure 3–4 Editing the panelFormLayout Node**

The Component Properties dialog for panelFormLayout is displayed.

- Click the **Tasks List Task Properties** tab, as shown in Figure 3–5.

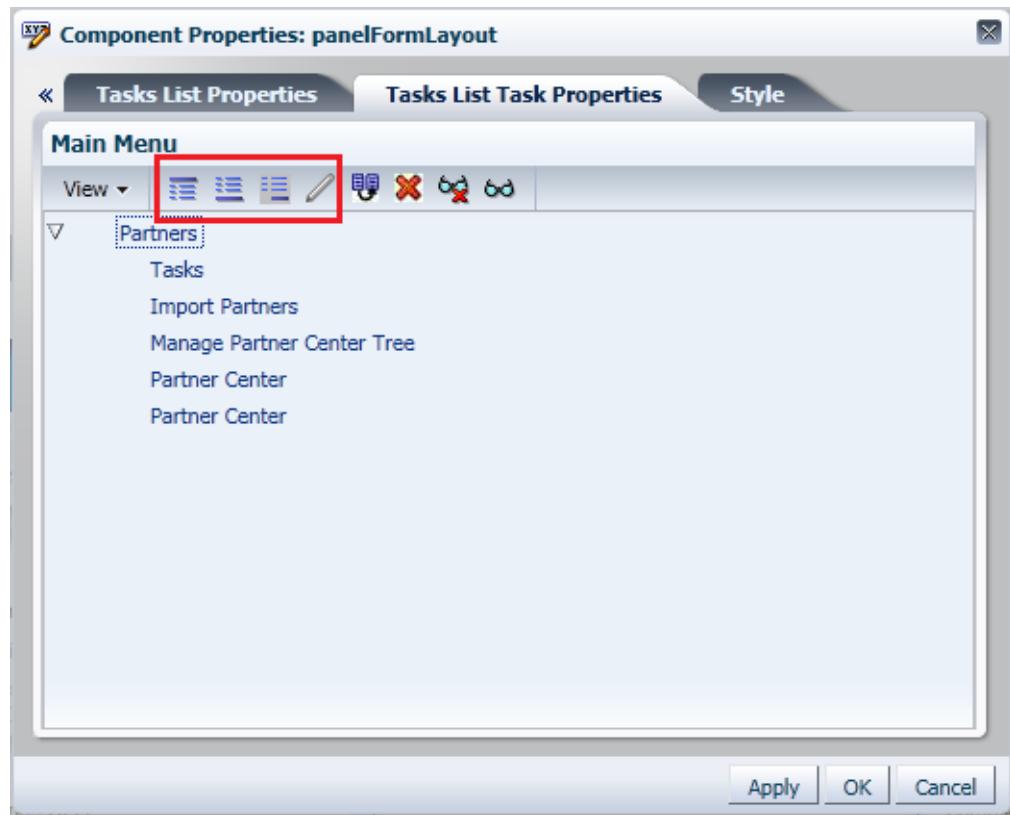
**Figure 3–5 Component Properties — Tasks List Task Properties Tasklist**

- Expand the tree to display the current items in the tasklist, as shown in Figure 3–6.

**Figure 3–6 Component Properties — Tasks List Task Properties Tasklist Items**



9. Highlight an item in the tree hierarchy and customize the tasklist by inserting a new item above, inserting a new item below, inserting a child item, or editing the current item by clicking the required icon located above the tree hierarchy, as shown in [Figure 3–7](#).

**Figure 3-7 Component Properties — Tasks List Task Properties Toolbar**

**10.** Enter or edit the following values:

- **Web Application:** Use the drop-down list to select the target web application. This list contains web applications that are defined in the deployments tables.

---

**Caution:** If you enter a value for **Web Application** then you must enter a value for **Focus View Id**.

---

- **Focus View Id:** Enter the `focusViewId` of the target page. For example, `/ServiceRequest`.

---

**Caution:** If you enter values for **Web Application** and **Focus View Id**, do not enter a value for **Destination** and vice versa.

---

- **Action:** Enter the action that is taken when this item is selected by the user. Pages with actions are defined in the `adfc-config.xml` file, and these actions can navigate the user to a particular page. If you specify an action here, the **Web Application** and **Focus View Id** values are ignored. This **Action** attribute is used in an ADF Controller navigation.
- **Label:** Enter the label name for this new item. This is the name that appears on the tasklist menu. This label name also appears on the **Task** tab when opened if the page's `isDynamicTabNavigation="true"`.

- **Rendered:** Select to display the item in the tasklist. Uncheck to hide the item.

---

**Note:** When unchecked, the item is displayed in italics on the customization dialog. This allows you to identify items that are currently hidden from users.

---

- **Destination:** Enter the full URL for this item, such as <http://www.example.com>. The Destination attribute is used for navigation outside of the Oracle Fusion Middleware UI Shell pages. It opens in a new window.

---

**Note:** Destination takes precedence over any specified Web Application

---

- **Task Type:** Choose the required task type for newly created items. Use the drop-down menu to select dynamicMain, defaultMain, defaultRegional, or taskCategory.

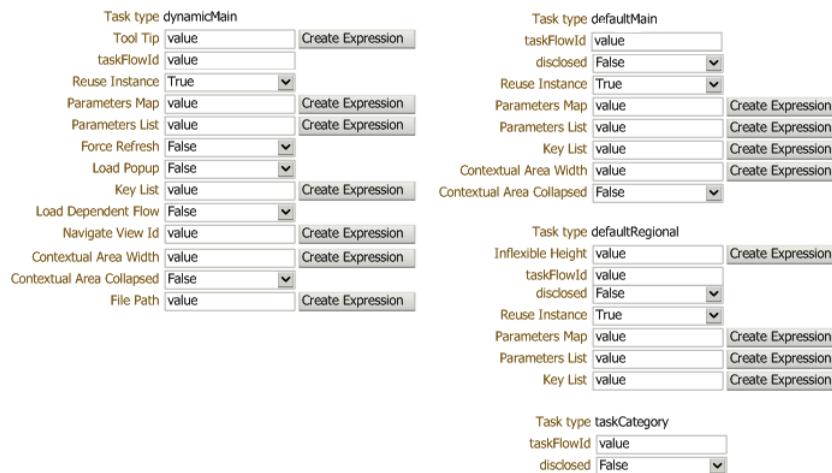
---

**Caution:** The task type can be specified by the administrator for the newly inserted item nodes only. It cannot be updated for an existing item node.

---

**Figure 3–8** lists the properties that are applicable based on the task type of the currently edited item node.

**Figure 3–8 Tasks List Task Properties — Task Types**



11. Click **Apply** to save your changes, then click **OK** to save your changes and close the Component Properties dialog.

### Task: Customize Attributes for a Flexfield on a Page

After you deploy an extensible or descriptive flexfield, you can use Oracle Composer to further control the custom attribute properties on a page-by-page basis. For

example, you can hide some custom attributes or reorder how they appear on the page.

---

**Note:** For information on flexfields, see [Chapter 5, "Using Flexfields for Custom Attributes."](#)

---

To customize flexfield values, edit the page in Source mode. In Source mode, navigate through the tree and expand the flexfield component (for example `descriptiveFlexfield`) to see the custom attributes. Click the flexfield component to display the Component Properties dialog box, where you can edit the values for the attributes.

#### **Task: Customize Popup Content**

You can use Oracle Composer to customize the content in pop-ups.

1. If Source view is not already displayed, switch to Source view. From the **View** menu, select **Source**.
2. Select the button that brings up the popup.
3. Open the properties for the popup.
4. Click the **Child Components** tab in the Component Properties dialog.
5. Edit the popup content.
6. Click **Apply** to save your changes, then click **OK** to save your changes and close the Component Properties dialog.

### **3.3 Editing Component Properties in Oracle Composer**

Components, such as task flows, portlets, documents, and layout components, carry with them a set of configurable properties that control the appearance and behavior of a particular component instance. For more information, see the “Setting Properties on Page Components” section in *Oracle Fusion Middleware User’s Guide for Oracle WebCenter Spaces*.

#### **Task: Edit Component Header and Other Display Options**

Typically, the **Display Options** tab presents settings that affect the display elements surrounding component content (that is, its chrome). Chrome includes the header, the **Actions** menu, **Expand** and **Collapse** icons, and the like. For example, use the display options on a task flow to hide or show a header, change the text in the header, enable or disable menus, show a tooltip for the component, and other options. Use the display options on an Image layout component to specify the image source URL and its optional link target. For more information, see the “Working with Component Display Options” section in *Oracle Fusion Middleware User’s Guide for Oracle WebCenter Spaces*.

#### **Task: Edit Component and Content Style**

Style and Content Style properties provide an opportunity to fine-tune your application look-and-feel at the component level. You can specify color, style, and margin settings on the selected component instance. For more information, see the “Working with Style and Content Style Properties” section in *Oracle Fusion Middleware User’s Guide for Oracle WebCenter Spaces*.

**Task: Edit Component Parameters**

Component parameters are settings, unique to the component type, that can control such things as the source of the component's content. Component parameters vary from component to component. For example, on some components they provide the opportunity to specify the source of task flow content; on other components they present read-only, application-generated identifiers that are used in maintaining a task flow instance's association with its customizations. For more information, see the "Working with Component Parameters" section in *Oracle Fusion Middleware User's Guide for Oracle WebCenter Spaces*.

**Task: Reset a Page or Task Flow to a Previously Saved Version**

Oracle Composer provides controls for resetting a page or task flow to a previously-saved version or to its original out-of-the-box state.

The **Reset Page** button is available on the page in both Design view and Source view. For more information, see the "Reset Page" section in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.

The **Reset Task Flow** button on the Source view toolbar is rendered only when editing a task flow. For more information, see the "Reset Task Flow" section in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.

**Task: Allow Certain Component Property Values to be Persisted Across Sessions**

Certain attribute values of ADF Faces components can be persisted for end users. For example, on the column component, an end user can change the width of a column, and that width will still be in effect when the user logs back into the application. For information about which component properties can be persisted, see the "Introduction to Allowing User Customizations" section of *Oracle Fusion Middleware Fusion Developer's Guide for Oracle Application Development Framework*.

To make a property persistable, list that property as a value for the persist parameter, using the procedures in the "Working with Style and Content Style Properties" section of *Oracle Fusion Middleware User's Guide for Oracle WebCenter Spaces*.

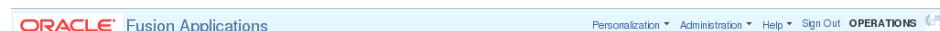
For more information about user personalization of components, see [Section 17.3, "Configuring End User Personalization for Components."](#)

## 3.4 Editing the UI Shell Template Used by All Pages

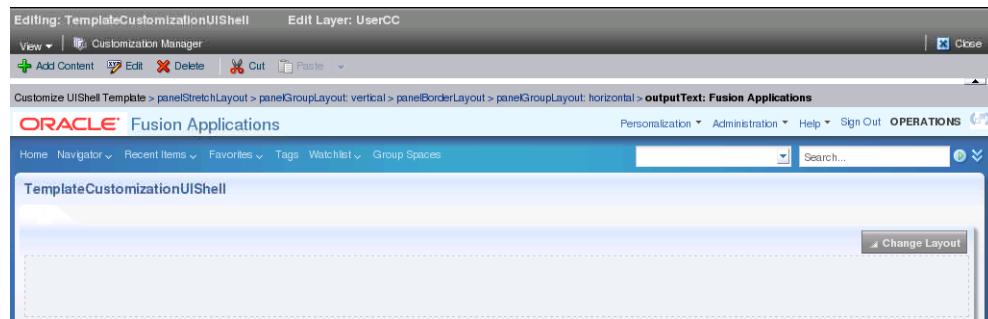
If you are customizing a CRM application, you can use Oracle Composer to edit the UI Shell template used by all Oracle Fusion applications. Otherwise you need to use JDeveloper. For more information, see [Section 11.9, "Editing the UI Shell Template."](#)

You edit the UI Shell template in source mode. The only customizable parts are in the global area (as shown in [Figure 3–9](#)) and a footer panel. Components can be added to any of these areas using the task flow.

**Figure 3–9 UI Shell Template — Global Area**

**Task: Customize the UI Shell Template**

1. Launch the UIShell Template task flow, as shown in [Figure 3–10](#).

**Figure 3–10 Edit UIShell Template**

2. Add or edit components to the left or central portion of the global area (the header area that contains the logo). For example, you can brand your application with your company logo.

You can also add a new component to the footer panel. For example, you can add company contact information. The footer panel is visible in edit mode even if no footer component has been added.

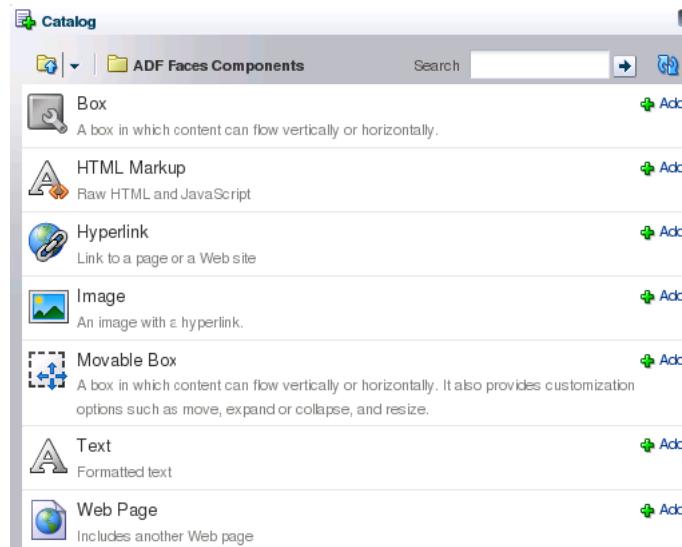
---

**Note:** If you need to do further customization, you can do with JDeveloper.

---

#### Task: Add a Component to the Global Area or the Footer

1. Select the portion of the global area to which you want to add a component, or select the footer, and click **Add Content** to open the component catalog.
2. Select **ADF Faces Components** to display the list of available components, as shown in [Figure 3–11](#).

**Figure 3–11 ADF Faces Components Catalog**

3. Choose the component that you want to add and click the associated **Add** icon.

The component is now displayed in the global area. You can now edit the component. For example, if you added the Text component, you can enter the text that you want displayed.

## 3.5 Editing Pages in Oracle JDeveloper After Using Oracle Composer

Using Oracle Composer, you can implement a variety of customizations on an application's pages. Pages that were created or customized in JDeveloper are further customizable in Oracle Composer, and page customizations that were implemented in Oracle Composer can be viewed in JDeveloper.

To see Oracle Composer customizations in JDeveloper, and potentially further customize the pages, you will need to export the customizations from the runtime environment and import them into the JDeveloper customization workspace. For more information, see the "Viewing ADF Library Runtime Customizations from Exported JARs" section of the *Oracle Fusion Middleware Fusion Developer's Guide for Oracle Application Development Framework*.

It is important to note that you cannot customize a given artifact at the same layer in both JDeveloper and Oracle Composer. You can, however, customize a given artifact in both tools provided the customizations are made at different layers. At run time, the tip layer customizations take precedence. For example, if you customize the label for a field in the site layer using Oracle Composer and customize the same label in the global layer using JDeveloper, the site layer customization will be displayed at run time.

# 4

---

## Customizing Objects

This chapter describes how to use CRM Application Composer to customize and extend application artifacts.

This chapter includes the following sections:

- [Section 4.1, "About Customizing and Extending Your Fusion Application with Objects"](#)
- [Section 4.2, "Editing Objects"](#)
- [Section 4.3, "Editing a Page in CRM Application Composer"](#)
- [Section 4.4, "Creating Custom Objects"](#)
- [Section 4.5, "Creating and Editing Search Objects"](#)
- [Section 4.6, "Editing Objects and Pages in Oracle JDeveloper After Using CRM Application Composer"](#)

### 4.1 About Customizing and Extending Your Fusion Application with Objects

CRM Application Composer allows you to customize existing objects, attributes, and rules and create new ones for the following CRM applications:

- Sales
- Marketing
- Customer Center
- Trading Community Architecture
- Order Capture

If you want to customize applications other than those listed here, then you will need to use developer tools to create or change objects. For more information, see [Chapter 11, "Customizing and Extending ADF Application Artifacts."](#) For more information about the other types of object customizations that you cannot perform in a runtime environment, see [Section 4.1.2, "What You Cannot Customize in the Runtime Environment."](#)

**Tip:** If you want to customize objects in applications other than those listed here, then you might be able to use flexfields. For more information about flexfields, see [Chapter 5, "Using Flexfields for Custom Attributes."](#)

### 4.1.1 What You Can Customize and Create in the Runtime Environment

CRM Application Composer allows you to create and customize objects for the Sales, Marketing, Customer Center, Trading Community Architecture, and Order Capture applications. Objects are high level artifacts that typically manage data that resides in a corresponding database table.

Using CRM Application Composer, you can perform object customizations like the following:

- Edit existing objects.

For example, you can edit the object's attributes or create custom attributes, add server script, create validation rules, create object workflows, and add saved searches.

- Edit the searches over your objects or create new ones.
- Create custom objects.

When using CRM Application Composer to create an object, you do not need to create the corresponding table to store the data, the tool manages that for you.

- Extend existing work areas or create new work areas.

You can edit pages for an existing object, or create pages for a custom object.

After you implement customizations on an object or create a custom object, you can use other tools to do the following:

- Add a custom object or a customized object to a report.

For more information, see [Chapter 8, "Customizing Reports and Analytics."](#)

- Set security on custom objects.

For more information, see [Chapter 9, "Customizing Security for Custom Business Objects."](#)

### 4.1.2 What You Cannot Customize in the Runtime Environment

While you can create objects using CRM Application Composer, the following are more advanced use cases for which you will need to use development tools:

- Customize or create an object contained in an application that is not Sales, Marketing, Customer Center, Trading Community Architecture, or Order Capture.

In those cases, you must use JDeveloper instead of CRM Application Composer to implement customizations. For more information, see [Chapter 11, "Customizing and Extending ADF Application Artifacts."](#)

- Edit relationships between preconfigured objects.

You can use CRM Application Composer to create custom objects that are a child object or related object of an existing object. However, you cannot modify the relationships between preconfigured objects. To customize the relationships between preconfigured objects, you must use JDeveloper. For more information, see [Chapter 11, "Customizing and Extending ADF Application Artifacts."](#)

- Create a new type of page for your new object. CRM Application Composer only allows you to create a work area pages to expose the object in the application.

If you want to create a new type of page that does not fit the CRM Application Composer design pattern, you must use JDeveloper. For more information, see [Chapter 11, "Customizing and Extending ADF Application Artifacts."](#)

- Edit the Navigator menu.

To customize the navigator menu, you use the Manage Menu Customizations task in the Setup and Maintenance work area. For more information, see [Chapter 6, "Customizing the Navigator Menu."](#)

- Use managed beans to contain logic for a page.

For example, if you want to add logic in response to a component event, you need to use JDeveloper. For more information, see the "Using a Managed Bean in a Fusion Web Application" section of the *Oracle Fusion Middleware Fusion Developer's Guide for Oracle Application Development Framework*.

### 4.1.3 Before You Begin Customizing and Extending Your Oracle Fusion Application with Objects

Before you customize or extend CRM applications using CRM Application Composer, you should be familiar with the Oracle Fusion application architecture that enables customization, as described in [Chapter 1, "Customizing and Extending Oracle Fusion Applications."](#) You should also understand the typical workflows for working with runtime customizations and extensions, as described in [Chapter 2, "Understanding the Customization Development Lifecycle."](#)

In addition, you will need to perform the following tasks before you can begin customizing or extending objects:

- Optionally, set up a sandbox.

CRM Application Composer can use sandboxes to manage your customizations. For more information, see [Section 2.2, "Using the Sandbox Manager."](#)

- Launch CRM Application Composer.

- You must have the necessary functional and data security privileges to access CRM Application Composer. Contact your security administrator for details.
- You can enter the CRM Application Composer environment directly from the application you want to customize. To launch CRM Application Composer, log in as an administrator to the application you want to customize, and from the Navigator menu, choose **CRM Application Composer**.

- Select the Application to Customize.

In addition to customizing the application you are logged in to, you can optionally implement customizations in objects that are common to multiple applications. To customize one of these common objects, select **CRM Common** from the **Application** dropdown list.

## 4.2 Editing Objects

You can customize objects in a number of ways using CRM Application Composer. Objects use metadata to store information about them, such as which attributes are displayed and how they are labeled. When you modify an object using CRM Application Composer, you are editing the object's metadata. For more information about how customizations are stored, see [Chapter 1, "Customizing and Extending Oracle Fusion Applications."](#) Also, for an overview of extensibility in CRM Application Composer, see the "Extending CRM Applications: How It Works" section in the *Oracle Fusion Applications CRM Extensibility Guide*.

Changes that you make to an object appear on the associated pages that display the object, without requiring editing of the page. The only time you need to edit a page

after customizing a object is if you add or remove an attribute in the object and want to add or remove that attribute on a page.

### Before You Begin

If the object you want to edit is not displayed in the CRM Application Composer tree when you select the application you want to customize, then you cannot use CRM Application Composer. You will need to use JDeveloper, as described in [Section 11.2, "Editing Existing Business Components."](#)

When you want to edit an existing object, expand that object in the Objects panel to display the kinds of editors that are available for the object.

### Task: Edit Attributes

You can change the properties of an attribute, such as changing the label or making it required. In CRM Application Composer, open the object you want to customize and use the Fields editor to make changes to the attribute. For more information, see the "Editing Fields: Explained" section in the *Oracle Fusion Applications CRM Extensibility Guide*.

For custom attributes, you can configure all properties pertaining to the field type and the exposed properties in the taskflows. When you make changes to an existing attribute, these changes are reflected in the pages that display the object.

For preconfigured attributes on standard objects and the system-generated attributes on custom objects, the only properties you can configure in CRM Application Composer are Display Label and Hint Text. For other changes to these kinds of attributes, you will need to use JDeveloper, as described in [Section 11.2, "Editing Existing Business Components."](#)

### Task: Add Attributes

You can use CRM Application Composer to add a custom attribute to an object using the Fields editor. Open the object you want to customize, and select **Fields**. For more information, see the "Editing an Object: Explained" section in the *Oracle Fusion Applications CRM Extensibility Guide*.

If you add an attribute and want that attribute to appear on a page, you will also need to add it to the page. You can do this in CRM Application Composer using the Pages editor. For more information, see [Chapter 3, "Customizing Existing Pages."](#)

### Task: Add and Edit Business Rules

You can add validation rules, triggers, and object functions to an object in CRM Application Composer using the Server Scripts editor. For example, you can add snippets of Groovy script that are executed at specific points in the lifecycle (Create, Modify, Remove, BeforeInsert, and so on). Open the object you want to customize, and select **Server Scripts**. The Server Scripts editor contains an expression builder, which helps you compose the script for your business rule. For more information, see the "Groovy Scripting: Explained" section in the *Oracle Fusion Applications CRM Extensibility Guide*.

### Task: Add Buttons and Links

You can use CRM Application Composer to create buttons and links for an object. This can be accomplished from the Buttons and Links editor. Open the object you want to customize, and select **Buttons and Links**. For more information, see the "Buttons and Links: Explained" section in the *Oracle Fusion Applications CRM Extensibility Guide*.

Using CRM Application Composer, you define a button or link that can then be used on a page for the object. If you add a button or link and want it to appear on a page, you will also need to add it to the page. You can do this in CRM Application Composer using the Pages editor. For more information, see [Section 4.3, "Editing a Page in CRM Application Composer."](#)

#### **Task: Edit the Web Service for the Object**

You do not need to modify the web service for an object after adding or removing attributes. The payload is managed for you by CRM Application Composer. However, if you have client applications that use the service, you will need to regenerate the web service proxy with the new WSDL to allow access to new attributes. For more information, see the *Oracle Fusion Applications CRM Extensibility Guide*.

#### **Task: Add Object Workflows**

Object workflows connect changes in objects to subsequent actions, which allows you to automate your commonly used business processes. You can use CRM Application Composer to add an object workflow that conditionally responds to one of the following record modification events for the object:

- When a record is created
- When a record is updated
- When a record is deleted

In response to these events, you can choose to take one of the following actions:

- Field Updates — update a field
- Email Notification — send an email
- Task Creation — create a task
- Outbound Message — post a message
- Business Process Flow — initiate a business process flow

To add an object workflow, open the appropriate object, select **Object Workflows**, and click **New**. For more information, see the "Object Workflows: Explained" section in the *Oracle Fusion Applications CRM Extensibility Guide*.

## **4.3 Editing a Page in CRM Application Composer**

When you make changes to an object in CRM Application Composer, some kinds of changes are automatically reflected on the pages for an object. For example, a change to the label text for an attribute does not require you to edit the corresponding page. However, for the kinds of changes described in this section (for example, adding components and reordering fields), you will need to edit the pages that contain the object, in order for the change to appear.

The Pages editor in CRM Application Composer allows you to create and edit the three types of pages that are associated with an object.

- landing page
- creation page
- detail page

At runtime, these pages are displayed in the work area of the application. Each of these pages has specific, preconfigured behaviors that are commonly associated with

the use of an object. For more information, see the "Creating a Work Area: Explained" section in the *Oracle Fusion Applications CRM Extensibility Guide*.

CRM Application Composer allows administrative users to make specific types of changes to the pages that expose objects. The actions that you perform in CRM Application Composer follow a specific design pattern, and are limited to changes associated with the object:

- adding and removing attributes
- reordering attributes
- adding buttons and links
- adding subtabs and tree nodes

For other modifications to pages (such as layout or look and feel), you can use Oracle Composer, as described in [Chapter 3, "Customizing Existing Pages."](#)

---

**Note:** When you use CRM Application Composer to customize the properties of attributes and other components of an object, your customizations are applied to the object and are reflected in the customized application on the pages in which that object appears. There is no need to make subsequent modifications to the UI components that display them on the page. However, if you want to modify a property of a component on a particular page (for example, changing the tooltip for a field on a particular page), you can use Oracle Composer to make this kind of change. For more information about using Oracle Composer to edit the properties of UI components, see [Section 3.3, "Editing Component Properties in Oracle Composer."](#)

---

### Before You Begin

In CRM Application Composer, you can create and edit only those pages that are associated with an object. Therefore you must start with an object. Whether you are customizing a preconfigured object or creating a custom object, the object must be created first.

Before editing the page for an object, you must launch CRM Application Composer, and select the application that contains the object you want to customize. For more information, see [Section 4.1.3, "Before You Begin Customizing and Extending Your Oracle Fusion Application with Objects."](#)

### Task: Add Components to a Page

After you add a field or button to an object, you can use the Pages editor in CRM Application Composer to add the corresponding components to the object's pages. Open the appropriate object, select **Pages**, and then click on the page you want to edit. For more information about using CRM Application Composer to edit pages, see the "Editing Pages: Explained" section in the *Oracle Fusion Applications CRM Extensibility Guide*.

To add other kinds of components to a page or to edit other types of pages, use Oracle Composer. For information about using Oracle Composer, see [Section 4.3, "Editing a Page in CRM Application Composer."](#)

### Task: Remove Components from a Page

You can use the Pages editor in CRM Application Composer to remove components associated with an object (such as, buttons and fields) from the object's pages. Open

the appropriate object, select **Pages**, and then click on the page you want to edit. For more information, see the "Editing Pages: Explained" section in the *Oracle Fusion Applications CRM Extensibility Guide*.

#### **Task: Reorder Fields on a Page**

Using CRM Application Composer, you can change the order of fields on a page using the Pages editor. Open the appropriate object, select **Pages**, and then click on the page you want to edit. For more information, see the "Editing Pages: Explained" section in the *Oracle Fusion Applications CRM Extensibility Guide*.

#### **Task: Enable Instance-Level Grant Conveyance**

When editing summary table on the landing page for a custom object, the Pages editor in CRM Application Composer provides the **Allow Access Grant** checkbox. Select this checkbox to allow the user of that page to give another user access to particular rows in that object. This option is also available for subtab tables. For more information, see [Section 9.3, "Enabling End User Instance-Level Security Customization."](#)

## **4.4 Creating Custom Objects**

Objects are high level artifacts that manage data residing in a database table. When you create a custom object, the underlying infrastructure to store the data is managed by CRM Application Composer. You can also use CRM Application Composer to add validation, child objects, and the pages that will display your custom object.

#### **Task: Create Custom Objects**

You can add custom objects to your CRM applications that allow you to expose and capture additional data. To create a custom object in CRM Application Composer, select **Custom Objects** and click **New**. This launches a dialog that allows you to name and create the object. After creating the object, you can edit the details for the object. For more information, see the "Extending CRM Applications: How It Works" section in the *Oracle Fusion Applications CRM Extensibility Guide*.

#### **Task: Create Relationships Between Objects**

With CRM Application Composer you can configure a custom object to be a related or child object of another object. To do this, click **Relationships** in the Common Setup panel. The Relationships editor allows you to define a relationship by selecting the source and target objects in the relationship.

You can also use CRM Application Composer to create custom objects that are a child object or related object of an existing object. To do this, select the existing object, and click **New** in the Child Objects or Related Objects area.

When you create an object as the child of another object, it will have cascading properties and it can only be used in the context of the parent object. It cannot be used as a standalone object or the child of another object. However, if you create a custom object and subsequently configure it as the child of another object, it can be used independently of the parent but it will not have cascading properties. For more information, see the "Object Relationships: Explained" section in the *Oracle Fusion Applications CRM Extensibility Guide*.

#### **Task: Add Business Rules**

You can add validation rules, triggers, and object functions to an object in CRM Application Composer using the Server Scripts editor. For example, you can add snippets of Groovy script that are executed at specific points in the lifecycle (Create,

Modify, Remove, BeforeInsert, and so on). Open the object you want to customize, and select **Server Scripts**. The Server Scripts editor contains an expression builder, which helps you compose the script for your business rule. For more information, see the "Groovy Scripting: Explained" section in the *Oracle Fusion Applications CRM Extensibility Guide*.

#### **Task: Create Pages for the Object**

After you have created an object, you can use CRM Application Composer to generate the pages (landing, creation, and detail) that expose the object in the work area of the application. You do this using the Pages editor. Open the object, and select **Pages**. For more information, see the "Creating a Work Area: Explained" section in the *Oracle Fusion Applications CRM Extensibility Guide*.

#### **Task: Add an Object Page to the Navigator menu**

After you have created a custom object and the pages that display it, you might want to add one or more of those pages to the Navigator menu. For information about modifying the Navigator menu, see [Chapter 6, "Customizing the Navigator Menu."](#)

#### **Task: Add Security for the Object**

After you have created an object, you can use CRM Application Composer to implement security for the object. If you want to customize security for an object contained in an application that is not Sales, Marketing, or Customer Center, you will need to use Functional Setup Manager. For more information about customizing security, see [Chapter 9, "Customizing Security for Custom Business Objects."](#) For information about using CRM Application Composer to implement security, see the security chapter in the *Oracle Fusion Applications CRM Extensibility Guide*.

#### **Task: Add an Object to an Existing Report**

The Custom Subject Areas editor in the Common Setup area of CRM Application Composer allows you create and customize subject areas that can be used in reports. You can use this editor to add objects, child objects, fields, date measuring, rollups, and aggregates to a subject area, as well as define which application roles can see them. To define a custom subject area, click **Custom Subject Areas** in the Common Setup panel, then click **New**.

After you define a custom subject area, a user of the application with the appropriate role, while running the BI Report Composer from the client, can select the report subject area and report on the objects and fields that were included as part of that subject area. For information about custom subject areas, see the "Editing an Object: Explained" section in the *Oracle Fusion Applications CRM Extensibility Guide*. For more information about customizing reports, see [Chapter 8, "Customizing Reports and Analytics."](#)

## **4.5 Creating and Editing Search Objects**

You can create and edit searches for an object in CRM Application Composer using the Saved Searches editor. Select an object and click **Saved Searches**. To edit an existing search object, select the saved search you want to edit, and click the **Edit** icon. To create a new custom search object, click the **Create** icon. For more information, see the "Saved Searches: Explained" section in the *Oracle Fusion Applications CRM Extensibility Guide*.

In addition to saved searches, the work area for an object contains a regional search and the landing page contains a local search. Using the Pages editor, you can specify which attributes from the object are used in the search. Select an object and click **Pages**. Then click the search you want to edit, either **Edit Regional Search** or **Edit Local**

**Search.** For more information, see the *Oracle Fusion Applications CRM Extensibility Guide*.

## 4.6 Editing Objects and Pages in Oracle JDeveloper After Using CRM Application Composer

Using CRM Application Composer, you can extend the application with custom objects, implement customizations on standard objects, and add and edit the pages that display those objects.

To see these customizations and custom objects in JDeveloper, you will need to export them from the runtime environment and import them into the JDeveloper customization workspace. For more information, see [Section 10.2.4, "Importing Customizations into Your Workspace."](#)

When using more than one tool to implement customizations and extensions, be aware of the following:

- Only standard objects and custom objects created in CRM Application Composer can be edited in CRM Application Composer.
- Only the pages associated with custom objects and customizable standard objects are editable in CRM Application Composer.
- Extensions and customizations implemented in JDeveloper are not editable in CRM Application Composer.
- Extensions and customizations implemented in CRM Application Composer are viewable in JDeveloper.

For example, you can extend your application with a custom object created in CRM Application Composer, and then import it into the JDeveloper customization workspace. You can then use JDeveloper to create or customize a page or task flow to use the runtime-generated object.

---

**Important:** Using JDeveloper to customize objects that are editable in CRM Application Composer is *not* recommended, because you cannot edit objects in CRM Application Composer that have been customized in JDeveloper. If you customize such an object in JDeveloper and subsequently open CRM Application Composer, the object will appear in the list of objects you can edit. But if you attempt to edit it, it can have an adverse impact on the application.

---



# 5

---

## Using Flexfields for Custom Attributes

This chapter describes how to use descriptive and extensible flexfields to add custom attributes to Oracle Fusion applications.

This chapter includes the following sections:

- [Section 5.1, "About Using Flexfields"](#)
- [Section 5.2, "Planning Your Flexfields"](#)
- [Section 5.3, "Creating Custom Value Sets"](#)
- [Section 5.4, "Configuring Flexfields"](#)
- [Section 5.5, "Validating Flexfield Configurations"](#)
- [Section 5.6, "Deploying Flexfield Configurations"](#)
- [Section 5.7, "Integrating Custom Attributes"](#)

### 5.1 About Using Flexfields

A *flexfield* is a set of placeholder fields (*segments*) that are associated with a business object. There are three types of flexfields — *descriptive*, *extensible*, and *key*. This chapter discusses how you can use descriptive and extensible flexfields to create custom attributes. This chapter does not discuss key flexfields, which you use to define keys such as part numbers, as explained in the product-specific documentation. In this chapter, the term *flexfield* applies to descriptive and extensible flexfields only.

Descriptive and extensible flexfields enable you to configure your applications to capture additional attributes without having to perform custom development. For example, you can modify an application to capture additional company-specific product information, such as voltage for electronic equipment, or size and color for clothing.

The attributes that you configure using flexfields flow through the technology stack, allowing custom attributes to be leveraged in user interface pages, incorporated into the service-oriented architecture (SOA) infrastructure, and integrated with Oracle Business Intelligence.

---

**Note:** For Sales, Marketing, Customer Center, Trading Community Architecture, and Order Capture applications, you use CRM Application Composer to add custom attributes instead of using descriptive and extensible flexfields. For more information, see [Section 4.2, "Editing Objects."](#)

---

### 5.1.1 What You Can Do with Flexfields at Runtime

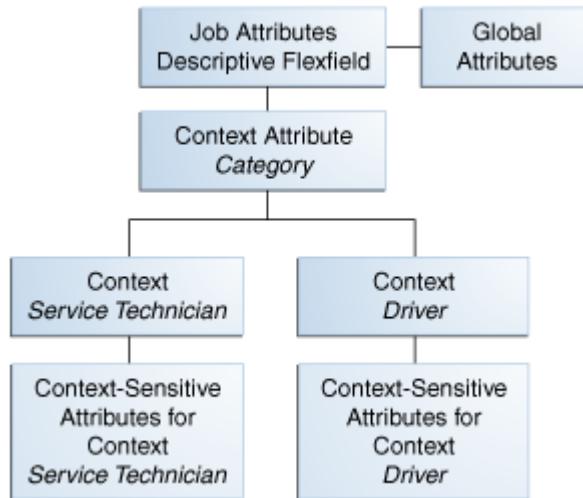
You can use descriptive and extensible flexfields to create custom attributes for flexfield-enabled business objects. The Oracle Fusion application developers decide which business objects have flexfields and whether to use a descriptive flexfield or an extensible flexfield (or both) for a business object. A descriptive flexfield is the more basic of the two and is more commonly used. As explained later in this section, extensible flexfields offer more advanced features, such as hierarchical configurations.

The product-specific documentation from Oracle Enterprise Repository available from Oracle Support lists the flexfield usages that are available for a user interface page. The documentation also indicates whether the available flexfield is descriptive or extensible. The flexfield type determines how you configure the custom attributes.

- Descriptive flexfield configuration: A descriptive flexfield enables you to add two types of custom attributes to a page — *global* and *context sensitive*. Global attributes are always available as fields in the UI. Context-sensitive attributes are made available to a UI page based on the value of a *context* attribute.

An example of where you would use context-sensitive attributes is a job, as illustrated in [Figure 5-1](#). Whereas some attributes are common to all jobs, such as whether the job is off site, some job attributes depend upon the job category (the context attribute). For example, you might want to store the service type for a service technician, whereas for a driver you might want to store the required CDL class.

**Figure 5-1 Example of Descriptive Flexfield Global and Context-Sensitive Attributes**



- Extensible flexfield configuration: You configure *categories*, *logical pages*, and *contexts* to make sets of custom attributes available to a user interface page.

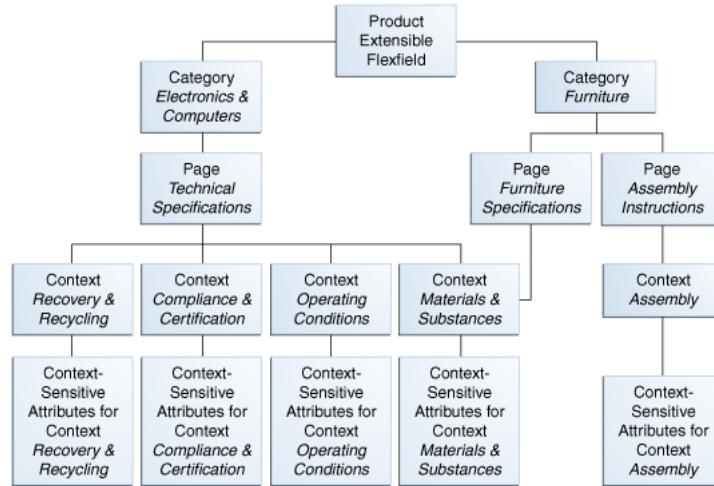
All extensible flexfields have at least one *category*, and some extensible flexfields enable you to configure a hierarchy of categories, where a given category can inherit contexts from its parent categories. For more information about categories, see [Task: Determine How Categories Are Defined for the Extensible Flexfield](#).

Unlike the descriptive flexfield, where each entity has just one context, which is determined by the context attribute, extensible flexfields enable you to configure *multiple contexts*. You use *logical pages* to arrange how the contexts appear in the user interface. For example, the extensible flexfield in [Figure 5-2](#) has been configured to include a Technical Specifications logical page in the user interface

for all items in the Electronics and Computers category. The Technical Specifications logical page contains the attributes for four contexts — Recovery and Recycling, Compliance and Certification, Operating Conditions, and Materials and Substances. [Figure 5–3](#) shows the user interface for the Technical Specifications logical page.

The user interface for items that are in the Furniture category includes a Furniture Specifications logical page and an Assembly Instructions logical page. Note that the two categories share the Materials and Substances context.

**Figure 5–2 Example of Extensible Flexfield Categories, Pages, and Contexts**



Another extensible flexfield feature is the ability to configure a context to store multiple rows per entity. The Materials and Substances context in [Figure 5–3](#) has been configured for multiple rows, and is thus displayed as a table.

**Figure 5–3 Technical Specifications Page with Associated Contexts**

Material/Substance	Contained Recyclate(%)	Percent of Unit Mass(%)	Mass(mg)
Lead/Lead Comp	3	2	4

You use the Manage Descriptive Flexfields task, shown in [Figure 5–4](#), and the Manage Extensible Flexfields task, shown in [Figure 5–5](#), to create your custom attributes. In addition, some setup activities enable you to complete product-specific flexfield configuration. For example, you can use the Manage Item Classes task in the Product

and Catalog Management application to manage a hierarchy of custom attributes for catalog items. For more information, see the product-specific documentation.

**Figure 5–4 Manage Descriptive Flexfields Task**

Name	Type	Module	Flexfield Code	Entity Usages	Description
Extract Definition Attributes	Descriptive	Extract Definition	PER_EXT_DEFINITIONS_DFF	[Icon]	Extract Definition Attributes
Citizenship Attributes	Descriptive	Personal Informe	PER_CITIZENSHIPS_DFF	[Icon]	Citizenship Attributes
Addresses Attributes	Descriptive	Personal Informe	PER_ADDRESSES_DFF	[Icon]	Addresses Attributes
All People Attributes	Descriptive	Personal Informe	PER_ALL_PEOPLE_DFF	[Icon]	All People Attributes
ContactRelships Attributes	Descriptive	Personal Informe	PER_CONTACT_RELSHIPS_DFF	[Icon]	ContactRelships Attributes
Drivers License Types Attribute	Descriptive	Personal Informe	PER_DRIVERS_LICENSE_TYPES	[Icon]	Drivers License Types Attributes
EmailAddresses Attributes	Descriptive	Personal Informe	PER_EMAIL_ADDRESSES_DFF	[Icon]	EmailAddresses Attributes
Ethnicity Attributes	Descriptive	Personal Informe	PER_ETHNICITIES_DFF	[Icon]	Ethnicity Attributes
National Identifiers Attributes	Descriptive	Personal Informe	PER_NATIONAL_IDENTIFIERS	[Icon]	National Identifiers Attributes
Persons Attributes	Descriptive	Personal Informe	PER_PERSONS_DFF	[Icon]	Persons Attributes

**Figure 5–5 Manage Extensible Flexfields Task**

Name	Type	Module	Flexfield Code	Entity Usage	Description
Location Information EFF	Extensible Flk Locations		PER_LOCATION_INFORMA	[Icon]	Location Information
Assignment EIT Information EFF	Extensible Flk Employment		PER_ASSIGNMENT_EIT_EFI	[Icon]	Assignment Extra Information EFF
Job EIT Information	Extensible Flk Work Structures Job		PER_JOBS_EIT_EFF	[Icon]	Job EIT Information
Position EIT Information	Extensible Flk Work Structures Positions		PER_POSITIONS_EIT_EFF	[Icon]	Position EIT Information
Position Legislative Information	Extensible Flk Work Structures Positions		PER_POSITIONS_LEG_EFF	[Icon]	Position Legislative Information
Location Legislative EFF	Extensible Flk Locations		PER_LOCATION_LEG_EFF	[Icon]	Location Legislative
Job Legislative Information	Extensible Flk Work Structures Job		PER_JOBS_LEG_EFF	[Icon]	Job Legislative Information
Organization Information EFF	Extensible Flk Organizations		PER_ORGANIZATION_INFO	[Icon]	Organization Information
Person Contact EIT Information	Extensible Flk Personal Information		PER_PERSON_CONTACT_E	[Icon]	Person Contact EIT Information
Person EIT Information	Extensible Flk Personal Information		PER_PERSON_EXTRA_INFO	[Icon]	Person EIT Information

You will most likely want to specify validation rules for your custom attributes. For example, you might want to specify a minimum and maximum value, or you might

want the end user to select from a list of valid values. You use the Manage Value Sets task to specify validation rules, as shown in [Figure 5–6](#).

**Figure 5–6 Manage Value Sets Task**



As described in the remaining sections in this chapter, you perform the following steps to configure custom attributes:

1. Plan the configuration.
2. Find or create the required value sets using the Manage Values Sets task and optionally configure value set security privileges.
3. Define the attributes using the appropriate task — Manage Extensible Flexfields or Manage Descriptive Flexfields.
4. Deploy the flexfield to display the custom attributes on the application pages and to make them available for integration into the technology stack. The flexfield artifacts that are generated during deployment are saved to the metadata repository. You can optionally deploy to a sandbox for initial testing.
5. Perform the necessary steps to integrate into technology stack.

After your custom attributes are displayed on the application pages, you can customize the attributes on a per-page basis using Oracle Composer, as described in [Chapter 3, "Customizing Existing Pages."](#)

If you need to create translations of the value sets and the custom attributes for different locales, see [Chapter 16, "Translating Custom Text."](#)

### 5.1.2 What You Cannot Do with Flexfields at Runtime

You can use the flexfield feature to add attributes only to entities that have a descriptive or extensible flexfield. For information about creating flexfields for other entities, see the "Getting Started with Flexfields" chapter in the *Oracle Fusion Applications Developer's Guide*.

---

**Note:** You cannot use key flexfields to add custom attributes.

---

The following applications, which are part of the Customer Relationship Management (CRM) product family, include CRM Application Composer for extending and customizing applications. With those applications, you use CRM Application Composer to add custom attributes. For all other applications, you use flexfields to add custom attributes, as described in this chapter.

- Sales
- Marketing
- Customer Center
- Trading Community Architecture
- Order Capture

For more information, see [Section 4.2, "Editing Objects."](#)

### 5.1.3 Before You Begin Using Flexfields to Create Custom Attributes

Before you use flexfields to create custom attributes, you should be familiar with the Oracle Fusion application architecture that enables customization, as described in [Chapter 1, "Customizing and Extending Oracle Fusion Applications."](#) You should also understand the typical workflows for working with customizations, as described in [Chapter 2, "Understanding the Customization Development Lifecycle."](#)

## 5.2 Planning Your Flexfields

The planning of your custom attribute additions is an important activity in preparation for flexfield configuration. You begin by completing the steps in [Task: Determine Flexfield Code, Module, and Type](#) to find out if flexfields are available for the business objects for which you want to add attributes and, if so, whether they are descriptive or extensible. The way in which you plan and configure a flexfield depends on whether it is descriptive or extensible.

If you are configuring a descriptive flexfield, complete the following tasks:

- Determine existing context values
- Determine existing context segment setup
- Determine available parameters
- List custom attributes
- Plan the descriptive flexfield structure
- Map attributes to available table columns
- Define attribute properties
- Determine validation

If you are configuring an extensible flexfield, complete the following tasks:

- Determine how categories are defined for the flexfield
- Determine existing context values
- List custom attributes
- Plan categories
- Plan the extensible flexfield structure
- Map attributes to available table columns
- Define attribute properties
- Determine validation

#### **Task: Determine Flexfield Code, Module, and Type**

Before you begin planning the flexfield configuration, you must determine whether descriptive or extensible flexfields are available for the user interface page for which you want to add custom attributes, and, if so, you must obtain each flexfield's code, module, and type (extensible or descriptive). For an extensible flexfield, you also need the usage name. Consult the product-specific documentation from Oracle Enterprise Repository available from Oracle Support to obtain this information.

---

**Note:** Not all flexfields are available for creating custom attributes. Consult the product-specific documentation to verify whether there are any restrictions on the flexfield usage.

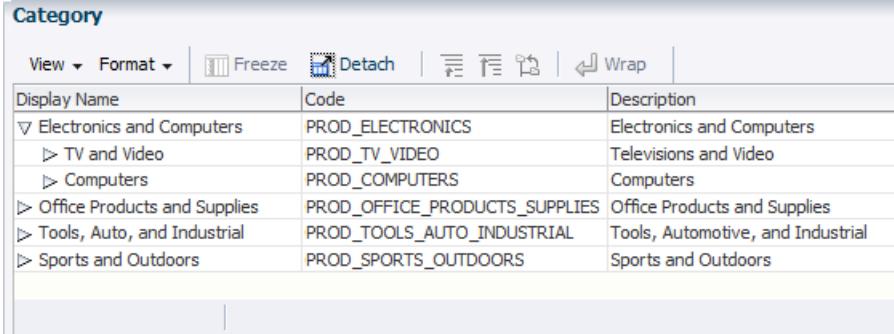
---

#### **Task: Determine How Categories Are Defined for the Extensible Flexfield**

Most extensible flexfields are configured with only one *category*, which is often referred to as the *root* category. Some extensible flexfields, such as the Items Extended Attributes flexfield, provide tasks for creating and managing categories. In these cases, you can use the category hierarchy feature in your flexfield plan.

To view the categories for an extensible flexfield, access the Manage Extensible Flexfields task by choosing **Setup and Maintenance** from the Administration menu in the global area of Oracle Fusion Applications and searching for the task. Next, search for and edit the flexfield to see its categories. For example, Figure 5–7 shows the Category region for the Item Extended Attributes flexfield.

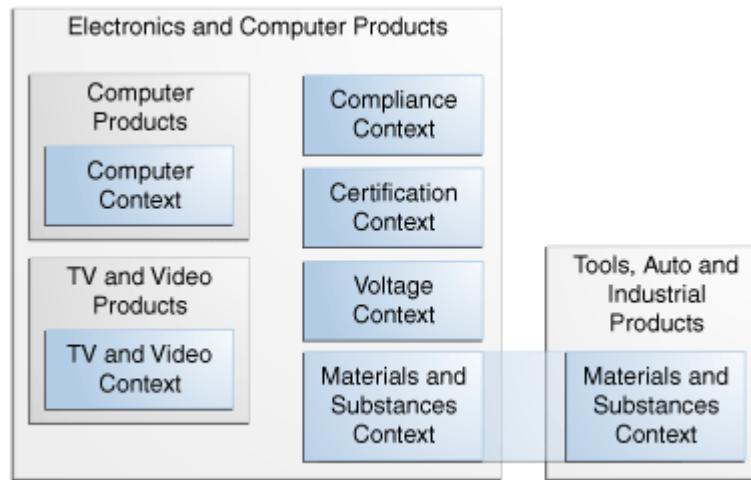
**Figure 5–7 Category Region**



Display Name	Code	Description
▼ Electronics and Computers	PROD_ELECTRONICS	Electronics and Computers
► TV and Video	PROD_TV_VIDEO	Televisions and Video
► Computers	PROD_COMPUTERS	Computers
► Office Products and Supplies	PROD_OFFICE_PRODUCTS_SUPPLIES	Office Products and Supplies
► Tools, Auto, and Industrial	PROD_TOOLS_AUTO_INDUSTRIAL	Tools, Automotive, and Industrial
► Sports and Outdoors	PROD_SPORTS_OUTDOORS	Sports and Outdoors

The Item Extended Attributes flexfield shown in [Figure 5–7](#) has several categories, including an Electronics and Computers category. The Electronics and Computers category contains a TV and Video subcategory and a Computers subcategory. The Electronics and Computers category has been customized to contain contexts for compliance and certification, voltage, and materials and substances, as shown in [Figure 5–8](#). The TV and Video category and the Computers category inherit the Electronics and Computer contexts in addition to having their own contexts.

**Figure 5–8 Category Hierarchy**



Contexts are reusable within a given extensible flexfield. For example, in [Figure 5–8](#) the Materials and Substances context also belongs to the Tools, Auto, and Industrial category.

### Task: Determine Existing Context Values

To evaluate whether your attributes can be associated with any existing context values, access the Manage Contexts page of the appropriate task — Manage Descriptive Flexfields or Manage Extensible flexfields — to view the list of configured context values.

Note that if context values have been pre-configured, you should consult the product-specific documentation for information.

**Tip:** For extensible flexfields, look at the region headers in the user interface page. The region header identifies the context of the fields in that region. For example, the first region in [Figure 5–3](#) contains the attributes that belong to the Recovery and Recycling context value.

### Task: Determine Existing Descriptive Flexfield Context Segment Setup

The context segment value for a descriptive flexfield might be derived from an external reference. To determine whether the context segment is derived, look at the **Derivation Value** field in the Context Segment region in the Edit Descriptive Flexfields window for the flexfield. For more information about derived values, see [Task: Determine Available Descriptive Flexfield Parameters](#).

### Task: Determine Available Descriptive Flexfield Parameters

Some descriptive flexfields provide parameters, which enable you to set the initial value of an attribute from external reference data, such as a column value or a session

variable. For example if a customer case flexfield has a user email parameter, you can configure the initial value for a customer email attribute to be derived from the parameter. You can view the **Derivation Value** drop-down list in the Create Segment window for the flexfield to determine what parameters are available for a descriptive flexfield.

### **Task: List Custom Attributes**

Once you have determined whether an extensible or descriptive flexfield is available, and you have determined the codes, existing contexts, and, if applicable, categories, you can begin planning for the flexfield configuration process. Start by listing all the custom attributes that you want to add. Later, as described in [Task: Define Attribute Properties](#), you define the attribute details

### **Task: Plan the Descriptive Flexfield Structure**

In addition to being able to define a set of attributes that can be stored for each entity (*global segments*), you can also define a context, and create subsets of attributes that vary by context value. Take, for example, the Manage Jobs user interface. You might want to use the Job Attributes descriptive flexfield on the Manage Jobs page to display different custom attributes depending on the job category. You can set the prompt for the context segment to "Category", and you can define a subset of attributes for each category value. The members of these subsets are called *context-sensitive segments*.

To begin planning the flexfield's structure, look at the attributes that you want to add and determine whether you can utilize the context feature for any of the attributes. Divide the list of attributes into two groups: the attributes for which you want to always store data (global data), and the attributes that you want to store only for a certain context segment value (context-sensitive data). If you have more than one case where you could use the context feature, you must choose the most essential case.

Next, make a list of the context segment values for which you need to configure sets of context-sensitive attributes. For each context segment value for which you want additional attributes to appear, list the associated context-sensitive attributes in the desired sequence. The following list shows an example of a plan for the Job Attributes descriptive flexfield.

- Global segments
  - OFFSITE
- Context segment
  - Prompt: Category
  - Value set: JOB\_CATEGORIES
  - Context values:
    - Service Technician
    - Engineer
    - Driver
- Context-sensitive segments for Service Technician
  - SERVICE\_TYPE (appliance, HVAC, facilities maintenance, vehicle maintenance)
- Context-sensitive segments for Engineer
  - REGULATIONS (building codes, OSHA)
- Context-sensitive segments for Driver

- CDL\_CLASS (A or B)

### Task: Plan Extensible Flexfield Categories

All extensible flexfields have at least one category, but some flexfields have been set up with a hierarchy of categories, as described in [Task: Determine How Categories Are Defined for the Extensible Flexfield in Section 5.2, "Planning Your Flexfields."](#)

How you structure the flexfield depends on how categories have been defined for the flexfield. Most extensible flexfields are pre-configured with one category, and you associate all your contexts and pages with that category. Other extensible flexfields are pre-configured with several categories and you associate your contexts and pages with those categories as instructed by the product-specific documentation. A small number of extensible flexfields enable you to configure multiple categories through application user interfaces. In these cases, you can take advantage of the inheritance feature to associate a context with more than one category. For example, the Item Extended Attributes flexfield might be set up with the following categories:

- Electronics and Computers
  - TV and Video
  - Computers

Suppose you want to store voltage information for all electronic and computer items. If you associate a Voltage context with the Electronics and Computers category, then both the TV and Video category and the Computers category will inherit the Voltage context from the parent Electronics and Computers category. [Figure 5–9](#) shows the contexts that have been associated with a Computers category. Three of the contexts are inherited from the parent category.

**Figure 5–9 Contexts Associated with the Computer Category**

The screenshot shows two windows side-by-side. The top window is titled 'Category' and displays a hierarchical tree of categories. The 'Computers' node under 'Electronics and Computers' is selected. The bottom window is titled 'Category: Details' and shows a table of 'Associated Contexts'. The 'Processor Specifications' context is associated with the 'Computers' category. The 'Materials and Substances' and 'Voltage' contexts are associated with both the 'Computers' and 'Electronics and Computers' categories. The 'Compliance and Certification' context is also associated with the 'Computers' category.

Display Name	Code	Description
Electronics and Computers	PROD_ELECTRONICS	Electronics and Computers
TV and Video	PROD_TV_VIDEO	Televisions and Video
Computers	PROD_COMPUTERS	Computers
Office Products and Supplies	PROD_OFFICE_PRODUCT	Office Products and Supplies
Tools, Auto, and Industrial	PROD_TOOLS_AUTO_IND	Tools, Automotive, and Industrial
Sports and Outdoors	PROD_SPORTS_OUTDOOR	Sports and Outdoors

Associated Contexts			
Display Name	Inherited Associated Category	Behavior	Description
Processor Specifications	Computers	Single Row	Processor Specifications
Materials and Substances	Electronics and Computers	Multiple Rows	Materials and Substances
Voltage	Electronics and Computers	Single Row	Voltage
Compliance and Certification	Electronics and Computers	Single Row	Compliance and Certification

### Task: Plan the Extensible Flexfield Structure

Extensible flexfields enable you to define multiple sets of attributes, where each set is called a *context*. For example, the Item Extended Attributes flexfield might have the following contexts:

- Materials and Substances
- Compliance and Certification

- Voltage

On the other hand, for the Position EIT Information flexfield, you might group your custom attributes into the following contexts:

- Educational Requirements
- Certification and License Requirements
- Travel Requirements

To begin the planning process, group the custom attributes into contexts and determine the order in which the attributes should appear.

A context can optionally store multiple rows of data for a single entity. For example, with the Certification and License Requirements context for the Position EIT Information flexfield, you might want to store values for all the certificates and licenses that are required to perform the position. For contexts that store multiple rows, determine whether a row requires a unique key. If it does, determine which attributes form the key.

For each category (or for the single category if the flexfield was not set up with multiple categories), group the category's contexts into logical pages and determine the sequence in which the logical pages should appear.

---

**Note:** For hierarchical categories, the child categories inherit the logical pages that are defined for the parent categories.

---

The following list shows an example plan for custom computer attributes for the Item Extended Attributes flexfield. In this example, the Electronics Information page is inherited from the parent Electronics and Computers category.

- Page: Electronics Information
  - Context: Compliance and Certification, single row
    - \* ISO\_14001
    - \* ENERGY\_STAR
    - \* ROHS
  - Context: Voltage, single row
    - \* MIN\_VOLTAGE
    - \* MAX\_VOLTAGE
    - \* CURRENT\_TYPE
  - Context: Materials and Substances, multiple rows
    - \* MATERIAL
    - \* CONTAINED\_RECLYCATE
    - \* PERCENT\_UNIT\_MASS
- Page: Computer Information
  - Context: Processor Specifications, single row
    - \* MANUFACTURER
    - \* CPU\_TYPE

- \* PROCESSOR\_INTERFACE
- \* PROCESSOR\_CLASS
- \* PROCESSOR\_SPEED
- \* CORES

The following list shows a sample plan for the Position EIT Information flexfield.

- Page: Additional Position Information
  - Context: Educational Requirements, single row
    - \* LEVEL (high school, bachelor, master, MD, Ph.D.)
  - Context: Certification and License Requirements, multiple rows
    - \* TYPE (certificate or license)
    - \* NAME (for example, ASE, NACE Level II, CP Specialist)
  - Context: Travel Requirements, single row
    - \* OVERNIGHT\_TRAVEL\_REQUIRED
    - \* INTERNATIONAL\_TRAVEL\_REQUIRED

### **Task: Define Attribute Properties**

Once you have an overall structure, you can work on defining the attribute properties that are listed in [Table 5–1](#).

**Table 5–1 Attribute Properties**

Property	Description
Sequence	The order the attribute appears in relation to the other configured attributes.
Enabled	Whether the attribute can be used.
Data type	Character, date, date and time, or number.
Indexed	(Extensible flexfield only) Whether the attribute should be marked as selectively required in search panels. That is, whether it is one of the attributes for which an end user must enter a value before conducting a search. Note that if you mark an attribute as indexed, you must ask your database administrator to create an index on the associated segment column.
Range type	If the attribute is part of a range specification, whether the attribute is the low value or the high value. For example, if adding minimum height and maximum height attributes, the minimum height attribute has a range type of low.
Required	Whether the end user is required to provide a value.
Initial value	The initial default value for an attribute when the row is created. You can specify a constant value or, for descriptive flexfields, you can specify a flexfield parameter, which provides a derived value.
Derivation value	The flexfield parameter from which to derive the attribute's value. Whenever the parameter value changes, the attribute's value is changed to match. If you derive an attribute from a descriptive flexfield parameter, consider making the attribute read-only, as user entered values are lost whenever the parameter value changes.

**Table 5–1 (Cont.) Attribute Properties**

Property	Description
Prompt	String to be used for the attribute's label in the user interface. Note that for global and context-sensitive attributes, you store the prompt string in the <b>Short Prompt</b> field in manage flexfield task. The <b>Prompt</b> field is not utilized in the user interface and is reserved for future use.
Display type	The type of field the attribute should be displayed in, such as text box, drop-down list, chooser (checkbox), list of values, radio button group, or hidden.
Checked and unchecked values	If the display type is chooser (checkbox), the actual values to save. For example, Y and N or 0 and 1.
Display size	The character width of the field.
Display height	The height of the field.
Read only	Whether the field should display as read-only (non-editable) text.

### Task: Map Attributes to Available Table Columns

Before you begin configuring a descriptive or extensible flexfield, you should compile a list of available flexfield table columns and choose which column to use for each custom attribute.

**Tip:** For descriptive flexfields, first map your global attributes. Then you can allocate the remaining table columns to the context-sensitive segments. You can allocate a table column to more than one context-sensitive segment but a table column can be used only once per context attribute value.

For extensible flexfields, if you do not have enough available segments of a certain type (character or number) for a context, add another context to the same category to hold the remaining attributes.

To see the available table columns for a data type, edit the flexfield in the Manage Descriptive Flexfields task or the Manage Extensible Flexfields task, as appropriate, and access the Create Segment window. Select the desired data type, view the **Table Column** list as shown in [Figure 5–10](#), and note the available columns for that data type. Repeat for each data type for which you will be adding attributes and map the custom attributes to available columns.

**Figure 5–10 Table Column List for the Character Data Type**

### Task: Determine Validation

For every attribute that you define for an extensible or descriptive flexfield, you need to determine its validation rules. For example one attribute might need to match a specified format, while another attribute might be restricted to a list of values. You use value sets to specify the validation rules for an attribute, as described in [Section 5.3](#).

"[Creating Custom Value Sets](#)." Determine each attribute's validation rules and check whether value sets already exist or you need to create new ones.

Context-attribute value validation is somewhat different. While value sets are required for global and context-sensitive attributes, a value set is optional for descriptive flexfield context attributes. If a value set is not defined for a context attribute, the application validates an input value against the context attribute's values. For example, if you created YES and NO context attribute values, you do not need an associated value set if YES and NO are the only valid values. There can be situations where a context attribute might also require a value set. Say, for example, that you need custom context-sensitive attributes for a YES value, but you do not need any custom attributes for a NO value. You only need to add a YES context attribute value. Because you do not have a NO context value, the context attribute requires a value set of YES and NO, as both values are valid. Another example is when the valid values are a subset of the context values. For example, you might have contexts for several countries, but the list of values from which the end user selects the context value might be confined to the countries in the user's region.

You only can use table and independent value sets to validate context values. If you use a table value set, you cannot reference other flexfield segments in the value set's WHERE clause. That is, the WHERE clause cannot reference SEGMENT.segment\_code or VALUESET.value\_set\_code. For more information, see [Task: Create a Table Value Set](#) in [Section 5.3, "Creating Custom Value Sets"](#).

When determining an attribute's validation rules, consider the following questions:

- What is the data type — character, date, date and time, or number?
- Does the attribute require any validation beyond data type and maximum length?
- If the data type is character, should the value be restricted to digits, or are alphabetic characters allowed? If a number, should the value be zero filled?
- If alphabetic characters are allowed, should they automatically be changed to uppercase?
- For numeric values, what are the number of digits that can follow the radix separator?
- Do you want to provide a list of values from which to select a valid value for the attribute? If so, consider the following questions:
  - Can you use an existing application table from which to obtain the list of valid values, or do you need to create a custom list?
  - If you are using an existing table, do you need to limit the list of values using a WHERE clause?
  - Does the list of valid values depend on the value in another flexfield attribute?
  - Is the list of valid values a subset of another flexfield attribute's list of values?
- Does the value need to fall within a range?

## 5.3 Creating Custom Value Sets

You use *value sets* to control the values that can be stored for the custom attributes. A value set is a predefined group of values that you can use to validate the content of the flexfield segment. Different segments in the flexfield can use the same value set, as well as segments in other flexfields.

Value sets enable you to enforce the following types of data validation:

- List of values: You can use one of the following types of lists to specify the valid values for an attribute:
  - Table column: If the valid values already exist in a table column, you can use a *table* value set to specify the list of values. You can use a SQL WHERE clause if you need to limit the valid values to a subset of the values in the table. Table value sets also provide some advanced features, such as enabling validation to depend upon custom attributes in the same structure.
  - Custom list: You can use an *independent* value set to specify a custom set of valid values. For example, you can use an independent value set of Mon, Tue, Wed, and so forth to validate the day of the week.
  - Dependent custom list: You can use a *dependent* value set when the available values in the list and the meaning of a given value depend on which independent value was selected in a prior segment. For example the valid state holidays depend on which state you are in. You can think of a dependent value set as a collection of value subsets, with one subset for each value in a corresponding independent value set.

You can further limit the valid values that an end user can select or enter by specifying format, minimum value, and maximum value.

- Subset: You can use a *subset* value set when you want to use a subset of values from an existing independent value set. For example if you have an independent value set for the days of the week, a weekend subset can be composed of its entries for Saturday and Sunday.
- Format: You can use a *format-only* value set when you want to allow end users to enter any value so long as that value conforms to formatting rules. For example, if you specify a maximum length of 3 and numeric-only, then end users can enter 456, but not 4567 nor 45A. You can also specify the minimum and maximum values, whether to right-justify, and whether to zero-fill. With a format-only value set, no other types of validation are applied.
- Range of values: You can use either a format-only, independent, or dependent value set to specify a range of values. For example, you might create a format-only value set with format type of Number where the end user can enter only the values between 0 and 100. Or, you might create a format-only value set with format type of Date where the end user can enter only dates for a specific year (a range of 01-JAN-93 to 31-DEC-93, for example). Since the minimum and maximum values enforce these limits, you need not define a value set that contains each of these individual numbers or dates

---

**Note:** You only can use table and independent value sets to validate context values. The data type must be character and the maximum length of the values being stored must not be larger than the context's column length. If you use a table value set, the value set cannot reference flexfield segments in the value set's WHERE clause other than the segment to which the value set is assigned.

---

If you are creating an independent, dependent, or subset value set, you must also define the set of valid values. For table, independent, dependent, and subset value sets, you can optionally implement value set security. If the Oracle Fusion Applications are running in different locales, you might need to provide different translations for the values and descriptions. For more information, see [Section 16.5, "Translating Flexfield and Value Set Configurations."](#)

You use the Manage Value Sets task, as shown in [Figure 5–11](#), to create and manage value sets. For more information, see the "Manage Value Sets" section in the *Oracle Fusion Applications Common Implementation Guide*.

**Figure 5–11 Edit Value Set Page in the Manage Value Sets Task**

The screenshot shows the 'Edit Value Set: 2 Digits' page. At the top, there are three buttons: 'Save', 'Save and Close', and 'Cancel'. Below this, there are several input fields: 'Value Set Code' (2 Digits), 'Description' (2 Digit positive number), 'Module' (Oracle Middleware Extensions for Applications), 'Validation Type' (Format Only), and 'Value Data Type' (Number). In the 'Definition' section, there are fields for 'Precision' (set to 2), 'Scale' (set to 0), 'Minimum Value' (0), and 'Maximum Value' (99).

---

**Note:** You cannot create or manage value sets in a sandbox.

---

When you change an existing value set, you must redeploy all flexfields that use that value set to make the flexfields reflect the changes. The **Usages** tabs show which flexfields are affected by the value set changes.

### Before You Begin

You will need to do the following before you can begin creating custom value sets:

- You must have the necessary function and data security privileges to access the Manage Value Sets task. Contact your security administrator for details.
- Access the Manage Value Sets task by choosing **Setup and Maintenance** from the Administration menu in the global area of Oracle Fusion Applications and searching for the task.

### Task: Define Format Specifications

Regardless of which type of validation you use for an attribute, the attribute will most likely require some sort of format specification. Before you create a value set, consider how you will specify the required format. Depending on the validation type and the value data type, you will be able to specify one or more of the options shown in [Table 5–2](#).

**Table 5–2 Format Options**

Option	Description
Value Data Type	Character, Number, Date, Date Time
Value subtype	The following options are available for the Character data type for the Dependent, Independent, and Format validation types: Text, Translated text, Numeric digits only, Time (20:08), Time (20:08:08). See the caution following this table in regards to the Text and Translated text subtypes.
Maximum Length	Maximum number of characters or digits for Character data type
Precision	Maximum number of digits the user can enter

**Table 5–2 (Cont.) Format Options**

Option	Description
Scale	Maximum number of digits that can follow the decimal point
Uppercase only	Lower-case characters automatically changed to uppercase
Zero fill	Automatically right-justify and zero-fill entered numbers (affects values that include only the characters 0-9)

---

**Caution:** When choosing between a value subtype of **Text** or **Translated text**, choose **Translated text** if your application has more than one language installed, or there is any possibility that you might install additional languages, and you might want to translate the display values into the other languages. Choosing the **Translated text** subtype does not require you to provide translated values now, but you cannot change this option if you decide to provide them later.

---

#### Task: Create a Format-Only Value Set

If you do not need to validate input against a list of valid values, then create a value set with the **Validation Type** of **Format**. You can also use this validation type to create a range specification, such as all numbers between 1 and 100.

#### Task: Create an Independent Value Set

If you need to validate the input against a custom list of values, where the list is not stored in an application table and the values are not dependent upon or a subset of another independent value set, then create a value set with a **Validation Type** of **Independent**.

After you create the value set, define the set of valid values as described in [Task: Define the Set of Valid Values](#).

---

**Note:** If the independent value set will have dependent value sets, you should not define individual independent values for the independent value set before defining its dependent value sets.

---

#### Task: Create a Dependent or Subset Value Set

If you need to validate the input against a custom list of values where the values are dependent upon or members of an independent value set, then create a value set with a **Validation Type** of **Dependent** or **Subset**, as appropriate. You must specify the Independent value set that it depends on.

After you create the value set, define the set of valid values as described in [Task: Define the Set of Valid Values](#).

---

**Note:** If you are defining a dependent value set, you should not define individual independent values for the corresponding independent value set before defining the dependent value set.

---

#### Task: Define the Set of Valid Values

Independent, dependent, and subset value sets require a customized list of valid values. You use the Manage Values page, as shown in [Figure 5–12](#), to create and

manage the valid values for a value set. To access the Manage Values page, select the value set from the Manage Value Sets page and click **Manage Values**.

**Figure 5–12 Manage Values Page**

The screenshot shows the 'Manage Values' page for a value set named 'EGO\_YES\_NO\_NUM'. The top navigation bar includes tabs for 'Value Set Code' (selected) and 'Description'. A 'Search' section contains fields for 'Value' (set to '%') and 'Description', with 'Search' and 'Reset' buttons. Below is a 'Search Results' table with columns: Value, Translated Value, Description, Enabled, and Start Date. Two rows are listed: one with Value '1' and Translated Value 'Yes', and another with Value '2' and Translated Value 'No'. Both rows have checked 'Enabled' boxes.

Value	Translated Value	Description	Enabled	Start Date
1	Yes		<input checked="" type="checkbox"/>	
2	No		<input checked="" type="checkbox"/>	

If you are adding a value to a dependent value set, you must associate it with a value from the parent independent value set.

If you are adding a value to a subset value set, you must select it from the parent independent set.

If the value set's subtype is **Translated text**, one of the fields will be **Translated Value**. This value is displayed instead of the value in the **Value** column for any end user who signs into the application under the same locale as the one under which the translated value was entered into the value set. If the Oracle Fusion applications are running in different locales, log in with each of the different locales for which you want to provide translations (or use the **Personalization > Set Preferences** menu item in the global area to set the locale) and enter the translated values and descriptions for that locale. If you do not provide a translation for a given locale, the value that was first entered is used for that locale.

### Task: Create a Table Value Set

If you need to validate the input against a list of values from an application table, then create a value set with a **Validation Type** of Table. You define which table you want to use and you specify the column that contains the valid value. You can optionally specify the description and ID columns, a WHERE clause to limit the values to use for your set, and an ORDER BY clause.

If you specify an ID column, the flexfield saves the ID value, instead of the value from the value column, in the associated flexfield segment.

If the underlying table supports translations, you can enable the display of translated text by basing the value set's value column on a translated attribute of the underlying table. You should also define an ID column that is based on an attribute that is not language dependent so that the value's invariant ID is saved in the transaction table. This allows the runtime to display the corresponding translated text from the value column for the runtime session's locale. For more information, see "Using Multi-Language Support Features" in the *Oracle Fusion Applications Developer's Guide*.

You can use the following bind variables in the WHERE clause.

- :{SEGMENT.segment\_code}

This bind variable refers to the ID (if the value set is ID-validated) or value (if not ID-validated) of a segment where *segment\_code* identifies the segment. The data type of the bind value is the same as the data type of the segment's column.

The segment must have a sequence number that is less than the sequence number of the segment with this bind. A matching segment must exist in the current flexfield context.

This bind variable is useful when the set of valid values depends on the value in another segment. For example, the values to select from a CITIES table might depend upon the selected state. If SEGMENT1 contains the state value, the WHERE clause for the CITIES table might be `state_code = :{SEGMENT1.SEGMENT1}`.

- **:{VALUESSET.value\_set\_code}**

This bind variable refers to the ID (if the value set is ID-validated) or value (if not ID-validated) of the segment that is assigned to the value set that is identified by the *value\_set\_code*. The data type of the bind value is the same as the data type of the segment's column.

The segment must have a sequence number that is less than the sequence number of the segment with this bind. If more than one segment is assigned to the value set, the closest prior matching segment will be used to resolve the bind expression. A matching segment must exist in the current flexfield context.

This bind variable is useful when the set of valid values depends on the value in another segment and that segment code can vary, such as when the value set is used for more than one context or flexfield. For example, the values to select from a CITIES table might depend upon the selected state. If the value set for the segment that contains the state value is STATES, the WHERE clause for the CITIES table might be `state_code = :{VALUESSET.STATES}`.

- **:{FLEXFIELD.internal\_code}**

This bind variable refers to an internal code of the flexfield in which the value set is used, or a validation date. The *internal\_code* must be one of the following:

- APPLICATION\_ID — the application ID of the flexfield in which this value set is used. The data type of APPLICATION\_ID and its resulting bind value is NUMBER.
- DESCRIPTIVE\_FLEXFIELD\_CODE — the identifying code of the flexfield in which this value set is used. The data type of DESCRIPTIVE\_FLEXFIELD\_CODE and its resulting bind value is VARCHAR2. Note that you use this string for both descriptive and extensible flexfields.
- CONTEXT\_CODE — the context code of the flexfield context in which this value set is used. The data type of CONTEXT\_CODE and its resulting bind value is VARCHAR2.
- SEGMENT\_CODE — the identifying code of the flexfield segment in which this value set is used. The data type of SEGMENT\_CODE and its resulting bind value is VARCHAR2.
- VALIDATION\_DATE — the current database date. The data type of VALIDATION\_DATE and its resulting bind value is DATE.

- **:{PARAMETER.parameter\_code}**

This bind variable refers to the value of a flexfield parameter where *parameter\_code* identifies the parameter. The data type of the resulting bind value is the same as the parameter's data type.

---

**Note:** You cannot assign a table value set to a context segment if the WHERE clause uses VALUESET.value\_set\_code or SEGMENT.segment\_code bind variables.

---

### Task: Implement Value Set Security

If you need to control end user access to the values in an independent, dependent, subset, or table value set, you can create security *policies* for that value set. These policies enable you to specify what values each end user can enter and view, based on the users' *roles*. End users will not be able to enter values for which they do not have access, and only the values they have access to appear in the list of values for the associated segments. Any security rules that you define for a value set affect every segment that uses the value set.

A *resource* identifies the data that needs to be secured by the policies, which in this case is the value set. Value set data security follows a "deny all, allow some" approach. This means that access to all of a resource's data is denied by default and, based on policies, end users only have access to the data that is appropriate for their role. You use *conditions* to define the data that can be accessed and you use *policies* to identify the roles that have the authority to access the data that is identified by the condition.

You can implement value set security after you create the value set, or you can implement it later by editing the value set. To implement security, select the Security Enabled checkbox and then provide the **Data Security Resource Name**. You can enter the name of an existing resource or type in the name of a data security resource that you want to create. This will be the name used for the database resource in the data security system. The name typically matches the name of the value set code.

---

**Note:** You cannot edit the data security resource name once you save your changes.

---

Once you save your changes to the **Data Security Resource Name**, you can click the Edit Data Security button to access the Edit Data Security page, provided that you have access to the Manage Database Security Policies task. On the Edit Data Security page, you can specify conditions, such as filters or SQL predicates, and you can define policies where you associate roles with conditions. You can use a filter for simple conditions. For more complex conditions, use a SQL predicate.

The data security conditions and policies that you define are similar to those that you can define for business objects. Value set security policies differ in the following ways:

- You only can grant read access to end users. You cannot specify any other *action*.
- When defining a condition that is based on an SQL predicate, use VALUE, VALUE\_NUMBER, VALUE\_DATE, VALUE\_TIMESTAMP, or VALUE\_ID to reference the value from a dependent, independent, or subset value set. For table value sets, use a table alias to define the table, such as &TABLE\_ALIAS.category\_id=70.

For more information data security resources, roles, conditions, and policies, see the "Managing Data Security Policies" chapter in the *Oracle Fusion Middleware Oracle Authorization Policy Manager Administrator's Guide (Oracle Fusion Applications Edition)*.

## 5.4 Configuring Flexfields

You use the Manage Descriptive Flexfields task or the Manage Extensible Flexfields task, depending on the flexfield type, to configure a flexfield.

## 5.4.1 Configuring Descriptive Flexfields

You use the Manage Descriptive Flexfields task shown in [Figure 5–13](#) to configure a descriptive flexfield.

When you configure a descriptive flexfield, you define the global segments, the context segment, and the context-sensitive segments. For each segment, you define its display properties and you specify how to validate its values.

---

**Note:** Some descriptive flexfields have more than one usage. That is, the same flexfield might be associated with more than one application table. For example, a user flexfield might be associated with a USER table and a USER\_HISTORY table. When you configure the user flexfield, the configuration applies to all usages.

---

If the Oracle Fusion Applications are running in different locales, you might want to provide different translations for the translatable text, such as prompts and descriptions. To create the translations, log in with each of the different locales (or use the **Personalization > Set Preferences** menu item in the global area to set the locale) and change the text to the translated text for that locale. For more information, see [Section 16.5, "Translating Flexfield and Value Set Configurations."](#)

**Figure 5–13 Edit Descriptive Flexfield Page in the Manage Descriptive Flexfields Task**

The screenshot shows the 'Edit Descriptive Flexfield: Job Attributes' page. At the top, there are buttons for 'Manage Contexts', 'Save', 'Save and Close', and 'Cancel'. Below this, the flexfield details are listed: Name (Job Attributes), Flexfield Code (PER\_JOBS\_DFF), Description (Job Attributes), Segment Separator (dropdown), Application (Global Human Resources), and Module (Work Structures Job).

**Global Segments**: A table with columns Sequence, Name, Table Column, Value Set, and Prompt. One row is visible: Sequence 5, Name Offsite, Table Column ATTRIBUTE1, Value Set Yes/No, and Prompt Off Site.

**Context Segment**: Fields include \* Prompt (Job Category), Value Set (JOB\_CATEGORIES), Default Type (dropdown), Required (checkbox), Displayed (checkbox checked), and Derivation (Value dropdown).

**Context Sensitive Segments**: A table with columns Sequence, Name, Table Column, Value Set, and Prompt. One row is visible: Sequence 10, Name Service Type, Table Column ATTRIBUTE3, Value Set 20 Characters, and Prompt Service T.

For more information, see the "Manage Descriptive Flexfields" section in the *Oracle Fusion Applications Common Implementation Guide*.

## Before You Begin

You will need to do the following before you can begin configuring the flexfield:

- Plan your flexfield configuration as described in [Section 5.2, "Planning Your Flexfields."](#)
- Create the required value sets as described in [Section 5.3, "Creating Custom Value Sets."](#)
- Compile a list of the UI pages that are affected by the flexfield as well as other artifacts in the technology stack. See [Section 5.7, "Integrating Custom Attributes"](#) for more information about how flexfield configuration affects these artifacts. Using this list, plan how you will integrate and test your flexfield configuration
- You must have the necessary function and data security privileges to access the Manage Descriptive Flexfields task. Contact your security administrator for details.
- Access the Manage Descriptive Flexfields task by choosing **Setup and Maintenance** from the Administration menu in the global area of Oracle Fusion Applications and searching for the task.

### Task: Configure Global Segments

Using the information that you gathered in your planning stage, configure a global segment for every attribute that applies to all entity instances, regardless of context. For each segment, provide the identifying information, the column assignment, how the value should be validated, the initial default value, and the display properties.

**Tip:** When you create segments for your attributes, you specify the sequence number for the segment. This sequence affects the order in which the attribute is displayed on the page. Before you begin creating segments, you might want to plan how you will number sequences. Consider numbering the segments in multiples, such as 4, 5, or 10, to make it easy to insert new attributes.

### Task: Configure Contexts

On the Edit Descriptive Flexfield page, specify the prompt, whether the segment should be displayed, and whether a value is required.

As explained in [Task: Determine Validation in Section 5.2, "Planning Your Flexfields,"](#) you do not need to specify a value set if the set of valid values is the same as the set of context values. If you need to associate a context with a value set, the value set must be an independent or table value set. The data type must be character and the maximum length of the values being stored must not be larger than the context's column length.

---

**Note:** You cannot assign a table value set to a context segment if the WHERE clause uses `VALUESET.value_set_code` or `SEGMENT.segment_code` bind variables.

---

Using the list of valid context values that you prepared in the planning stage, access the Manage Contexts page and create a context for each value. Create the context-sensitive segments for each context and provide the identifying information, the column assignment, how the value should be validated, and the display properties.

**Tip:** When you create segments for your attributes, you specify the sequence number for the segment. This sequence affects the order in which the attribute is displayed on the page. Before you begin creating segments, you might want to plan how you will number sequences. Consider numbering the segments in multiples, such as 4, 5, or 10, to make it easy to insert new attributes.

## 5.4.2 Configuring Extensible Flexfields

You use the Manage Extensible Flexfields task shown in [Figure 5–14](#) to configure an extensible flexfield.

When you configure an extensible flexfield, you define its contexts and associated context-sensitive segments and usages, and you associate the context with categories and pages. For each context-sensitive segment, you define its display properties and you specify how to validate its values.

If the Oracle Fusion applications are running in different locales, you might want to provide different translations for the translatable text, such as prompts and descriptions. To create the translations, log in with each of the different locales (or use the **Personalization > Set Preferences** menu item in the global area to set the locale) and change the text to the translated text for that locale. For more information, see [Section 16.5, "Translating Flexfield and Value Set Configurations."](#)

**Figure 5–14 Edit Context Page in the Manage Extensible Flexfields Task**

Sequence	Name	Code	Value Data Type	Disp
10	Capacitor_case_size	Capacitor_case_size	VARCHAR2	List
20	Capacitor_package_size	Capacitor_package_size	VARCHAR2	List
30	Dielectric	Dielectric	VARCHAR2	List
40	Esr_type	Esr_type	VARCHAR2	List
50	Mount	Mount	VARCHAR2	List
60	Temp_coefficient	Temp_coefficient	VARCHAR2	List
70	Capacitance	Capacitance	NUMBER	Text
80	Env_value	Env_value	NUMBER	Text

For more information, see the "Manage Extensible Flexfields" section in the *Oracle Fusion Applications Common Implementation Guide*.

### Before You Begin

You will need to do the following before you can begin configuring the flexfield:

- Plan your flexfield configuration as described in [Section 5.2, "Planning Your Flexfields."](#)

- Create the required value sets as described in [Section 5.3, "Creating Custom Value Sets."](#)
- Compile a list of the UI pages that are affected by the flexfield as well as other artifacts in the technology stack. See [Section 5.7, "Integrating Custom Attributes"](#) for more information about how flexfield configuration affects these artifacts. Using this list, plan how you will integrate and test your flexfield configuration
- You must have the necessary function and data security privileges to access the Manage Extensible Flexfields task. Contact your security administrator for details.
- Access the Manage Extensible Flexfields task by choosing **Setup and Maintenance** from the Administration menu in the global area of Oracle Fusion Applications and searching for the task.

#### **Task: Configure the Context**

Using the list of contexts that you prepared in the planning stage, access the Manage Contexts page and create the desired contexts. Create the context-sensitive segments for each context and provide the identifying information, the column assignment, how the value should be validated, the initial default value, and the display properties.

Some extensible flexfields have a **Translatable** option. If the context will be used to store free-form user-entered text in the language of the user's locale, and if different translations of that text can be stored for other languages, select **Translatable**. If you select **Translatable**, the context can only have format-only validated segments.

**Tip:** When you create segments for your attributes, you specify the sequence number for the segment. This sequence affects the order in which the attribute is displayed on the page. Before you begin creating segments, you might want to plan how you will number sequences. Consider numbering the segments in multiples, such as 4, 5, or 10, to make it easy to insert new attributes.

#### **Task: Configure Context Usages**

During the planning stage, you determined the flexfield usage for which you are adding attributes. You can associate a context with several usages, but ensure that the **Associate** checkbox is selected for the usages that you determined during the planning stage. Consult the product-specific documentation to understand the purpose of each usage.

#### **Task: Configure Categories and Category Details**

While most flexfields have a single category, some flexfields have multiple categories, which enable you to further group the contexts into categories. Some flexfields provide an activity or task for creating your own categories. Consult the product-specific documentation to determine whether you can create categories for the flexfield.

#### **Task: Associate Contexts with a Category**

Most flexfields have a single category which contains all the flexfield's contexts. Some flexfields enable you to work with multiple categories. To associate contexts with a category, select the category on the Edit Extensible Flexfield page. Then, in the Associated Contexts tab, add the desired contexts to the selected category.

#### **Task: Create Logical Pages for a Category**

Using the information from your plan, group the contexts into logical pages and determine the sequence in which the logical pages should appear. To build the logical

pages, select the category on the Edit Extensible Flexfield page. Then, in the Pages tab, add the desired contexts and specify their sequence.

## 5.5 Validating Flexfield Configurations

You can verify that a flexfield's metadata is complete and correctly configured by choosing **Actions > Validate Metadata** in either the Maintain Extensible Flexfields task or the Maintain Descriptive Flexfields task. The validations that this action performs are the same validations that are performed when you deploy a flexfield.

## 5.6 Deploying Flexfield Configurations

You must deploy a flexfield before you can access the custom attributes from the user interface and other parts of the technology stack. You use the appropriate flexfield management task — Manage Descriptive Flexfields or Manage Extensible Flexfields — to deploy a flexfield.

When you deploy a flexfield, the following occurs:

- The deployment process validates the flexfield metadata. If any errors are found, a popup is displayed with a list of the errors that were encountered, and the flexfield is not deployed. Note that the flexfield's status is not changed if metadata errors are encountered.
- The deployment process generates ADF Business Components and ADF Faces runtime artifacts that are based on the flexfield configurations.
- The deployment process adds the custom attributes to the web service definition language (WSDL) schemas that are exposed by ADF services and that are used by SOA composites.
- If the flexfield is enabled for business intelligence, the deployment process redeploys the flexfield's business intelligence artifacts.
- The web services that expose the base entity data also expose flexfield segment data.
- End users see the new custom attributes the next time they log into the application. The custom attributes will appear on all user interface pages that contain the flexfield, and in the search screens and desktop integration worksheets in which they have been integrated.

If you want to test the flexfield configuration before deploying it to the full test environment, you can deploy the flexfield to a flexfield sandbox. The changes that you deploy to a sandbox are isolated from the full test environment and can only be seen by those who make the flexfield sandbox active in their session. Once you are satisfied with the changes in the sandbox, you can deploy the changes to the full test environment.

After deployment, the custom attributes are available for incorporating into the SOA infrastructure, such as business process and business rule integration. For example, you can now write business rules that depend on the custom attributes.

Descriptive flexfields that are enabled for business intelligence are available for integrating with business intelligence (BI) technology, such as Oracle BI Enterprise Edition (BIEE) and Oracle Essbase.

For more information about flexfield deployment and flexfield sandboxes, see the "Flexfield Deployment" section in the *Oracle Fusion Applications Common Implementation*

*Guide.* For more information about integrating the deployed flexfield into the technology stack, see [Section 5.7, "Integrating Custom Attributes."](#)

### Before You Begin

You will need to do the following before you can begin deploying the flexfield:

- Configure the flexfield as described in [Section 5.4, "Configuring Flexfields."](#)
- You must have the necessary function and data security privileges to access the flexfield management task. Contact your security administrator for details.
- Access the appropriate flexfield management task — Manage Descriptive Flexfields or Manage Extensible Flexfields — by choosing **Setup and Maintenance** from the Administration menu in the global area of Oracle Fusion Applications and searching for the task.
- Use the Search region to access the desired flexfield.

### Task: Deploy a Flexfield to a Sandbox

If you want to test the flexfield configuration before deploying it to the production environment, you can deploy the flexfield to a sandbox. To deploy a flexfield to a sandbox, select the flexfield in the Search Results region, and choose **Deploy Flexfield to Sandbox** from the **Deploy Flexfield** button's submenu, as shown in [Figure 5–15](#). A progress window shows when the process has completed and the completion status.

**Figure 5–15 Deploying a Flexfield to a Sandbox**



The sandbox to which you deploy the flexfield is different from the standard sandboxes that are described in [Section 2.2, "Using the Sandbox Manager."](#) Each flexfield has its own sandbox. You do not need to create a flexfield sandbox, as the deployment process manages flexfield sandbox creation. When you deploy to the flexfield sandbox, a dialog box shows the name of the flexfield sandbox, and that flexfield sandbox is set as your current active sandbox.

---

**Note:** When you deploy to the flexfield sandbox, the `CreatedBy` value is set to `FlexfieldDeployment`.

---

When you next log into the application, you can see the updated flexfield configurations (You must log out and log back in to see the changes). The Oracle Fusion Applications global area displays your current session sandbox. When you hover over the sandbox name, the sandbox details appear. To exit a sandbox, hover over the sandbox name and click **Exit Sandbox**. To view additional details about the sandbox, hover over the sandbox name and click **More Details**.

If you want to make an existing flexfield sandbox active for your session, access the flexfield sandbox from the Manage Sandboxes page, select the flexfield sandbox, and click **Set as Active**. For information about accessing this page, see [Section 2.2, "Using the Sandbox Manager."](#)

Once you are satisfied with the changes, you can deploy the flexfield to the full test environment as described in [Task: Deploy a Flexfield to the Full Test Environment](#).

### Task: Deploy a Flexfield to the Full Test Environment

To deploy a flexfield to the full test environment, select the flexfield in the Search Results region, and click **Deploy Flexfield**.

A progress window shows when the process has completed and the completion status. If a sandbox exists for the flexfield, this sandbox is deleted automatically after the flexfield successfully deploys to the full test environment.

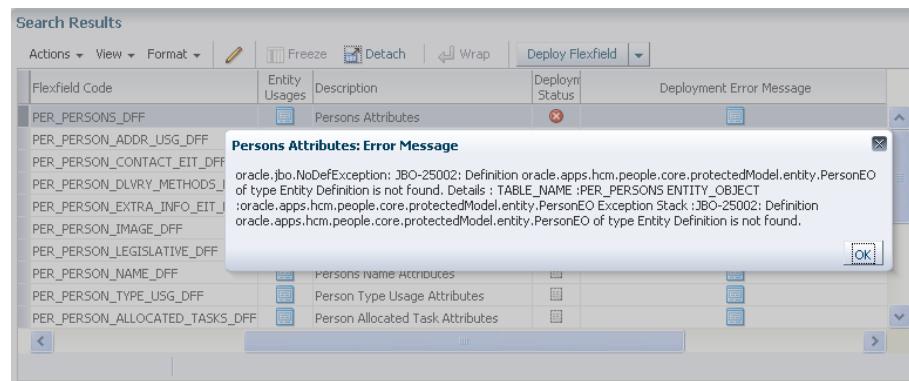
When you next log into the application, you can see the updated flexfield configurations (You must log out and log back in to see the changes).

### Task: Check Deployment Status

The Deployment Status column in the Search Results region shows the current status for each flexfield.

If a deployment error occurs, the Deployment Error Message column in the Search Results region provides details about the error, as shown in [Figure 5–16](#).

**Figure 5–16 Deployment Error Message**



## 5.7 Integrating Custom Attributes

Once you have deployed a flexfield, you can begin incorporating its custom attributes into the technology stack.

For information about the technology stack, see the "Oracle Fusion Middleware Components" chapter in the *Oracle Fusion Applications Concepts Guide*.

### Task: Customize Flexfield Pages

After you deploy an extensible or descriptive flexfield, the new attributes appear on all pages that contain the flexfield. You can use Oracle Composer to configure the custom attribute properties on a page-by-page basis. For example, you can hide some custom attributes. For more information, see [Chapter 3, "Customizing Existing Pages."](#)

---

**Note:** The custom attributes only appear on pages that include the flexfield. For information about adding flexfields to a page, see the "Adding Descriptive Flexfield UI Components to a Page" section or the "Employing Extensible Flexfields on an Application Page" section in the *Oracle Fusion Applications Developer's Guide*.

---

**Task: Incorporate Custom Attributes into the Business Intelligence Structure**

Some descriptive flexfields are enabled for incorporating into the business intelligence (BI) structure. Consult the product-specific documentation from Oracle Enterprise Repository available from Oracle Support for information about which flexfields are enabled for Oracle Business Intelligence.

If a descriptive flexfield is enabled for Oracle Business Intelligence, the Manage Descriptive Flexfields task displays a **BI Enabled** checkbox for each global, context, and context-sensitive segment. Select a segment's **BI Enabled** checkbox to specify that the segment is available for use in Oracle Business Intelligence.

When you deploy a flexfield with BI-enabled segments, the deployment process generates a set of *flattened* ADF Business Components in addition to the normal ADF Business Components and ADF Faces runtime artifacts that are generated during deployment. The flattened ADF Business components include a single attribute for the context segment if it is BI-enabled, as well as one attribute for each BI-enabled global segment. The flattened business components include a separate attribute for each BI-enabled context-sensitive segment for each context value. Context-sensitive segments are not equalized across context values.

After you deploy a business intelligence enabled flexfield, you must import the flexfield changes into the Oracle BI repository to make use of the newly flattened components in business intelligence and then propagate the flex object changes.

---

**Note:** When you import the metadata into the Oracle BI repository, you must do so as the FUSION\_APPS\_BI\_APPID user.

---

**Tip:** When you import a flexfield into the Oracle BI repository, you see both *name\_* and *name\_c* attributes for each segment, along with some other optional attributes. The *name\_* attribute contains the value. The *name\_c* attribute contains the code of the value set that the value comes from, and is used for linking to "value dimension." You must import both attributes.

For more information about importing and propagating your flexfield changes, see [Task: Configuring Descriptive Flexfields and Key Flexfields for Oracle Business Intelligence](#) in Section 8.3.3, "Customizing the Oracle BI Repository (RPD)." For information about adding flexfields to a BI Publisher data model, see the "Adding Flexfields" chapter in the *Oracle Fusion Middleware Data Modeling Guide for Oracle Business Intelligence Publisher (Oracle Fusion Applications Edition)*.

**Task: Incorporate Custom Attributes into Web Services and SOA Infrastructure**

When an extensible or descriptive flexfield is deployed, the deployment process regenerates the XML schema definition language (XSD), which makes the custom attributes available to web services and the SOA infrastructure.

After deploying a flexfield configuration, you must synchronize the updated XSD files in the SOA MDS repositories for each SOA application. For more information, see [Task: Synchronizing Customized Flexfields in the SOA MDS Repository](#) in Section 12.2, "Customizing SOA Composites."

For information about extending or customizing Business Process Execution Language (BPEL) processes, see Part "Using the BPEL Process Service Component" of *Oracle Fusion Middleware Developer's Guide for Oracle SOA Suite*.

For more information about service-oriented architecture, web services, BPEL processes, and business rules, see the *Oracle Fusion Middleware Administrator's Guide for Oracle SOA Suite and Oracle Business Process Management Suite*.



# 6

---

## Customizing the Navigator Menu

This chapter describes how to use the Manage Menu Customizations task in the Setup and Maintenance work area to customize the navigator menu by adding and deleting menu groups and items.

This chapter includes the following sections:

- [Section 6.1, "About Navigator Menu Configuration"](#)
- [Section 6.2, "Adding Groups"](#)
- [Section 6.3, "Adding Items"](#)
- [Section 6.4, "Hiding and Showing Nodes"](#)

### 6.1 About Navigator Menu Configuration

The *navigator menu* is the global menu that is accessible from the Oracle Fusion Applications global area. It allows an end user to navigate directly to pages inside of Oracle Fusion Applications as well as to outside web pages. The menu is composed of links (*items*) that are organized in a hierarchy of *groups*.

You can customize the navigator menu to address needs that are specific to your organization. For example, you might want to add specialized groupings for cross-functional teams or add links to web pages or external applications. You can add groups and links to the navigator menu, as well as hide and show them.

The navigator menu typically appears when the end user clicks the Navigator link, as shown in [Figure 6–1](#). However, in some applications the page template can be customized to present the top level groups and items as pull-down buttons, as shown in [Figure 6–2](#), in place of the single Navigator link. For information about how to display the navigator menu as a series of pull-down buttons see "Rendering the Navigator Menu as Pull-down Buttons" in the *Oracle Fusion Applications Developer's Guide*.

**Figure 6–1 Navigator Menu Example — Navigator Link**



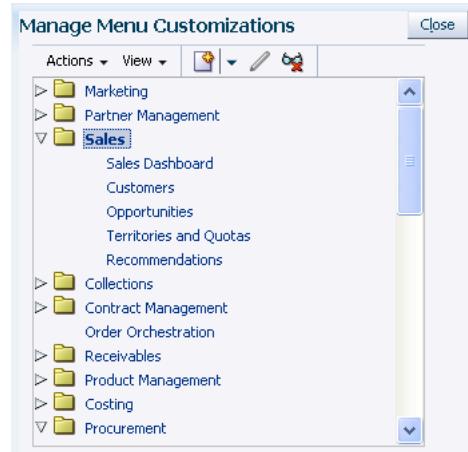
**Figure 6–2 Navigator Menu Example — Navigator Pull-down Buttons**



In a multi-tenant environment, you customize the navigator menu at the enterprise level and your changes affect the tenant at that enterprise level. Otherwise, you customize the navigator menu at the site level and your customizations affect all end users.

You use the Manage Menu Customizations task to customize the menu. This task is available from the Setup and Maintenance work area, which is accessible from the Administration menu in the Oracle Fusion Applications global area. The Manage Menu Customizations page displays the menu groups as expandable nodes, as shown in [Figure 6–3](#), with which you can traverse the menu hierarchy.

**Figure 6–3 Expandable Group Nodes in Manage Menu Customizations Page**



---

**Note:** Not all Oracle Fusion Applications pages appear in the navigator menu, as some pages are accessible from a work area or from other links in the global area such as the Home link.

---

### 6.1.1 What You Can Do with the Navigator Menu

If you have the required privileges, you can perform the following tasks to customize the menu:

- Add and delete custom groups
- Edit any group
- Add and delete custom items
- Edit any item
- Specify navigation for an item
  - Specify navigation to a UI Shell page in an Oracle Fusion application
  - Specify navigation to an external web page
- Hide or show groups and items

You can also localize your navigator menu customizations. For more information, see [Section 16.4, "Translating Navigator Menu Customizations."](#)

### 6.1.2 What You Cannot Do with the Navigator Menu

You cannot make the following menu customizations:

- You cannot add menu items (links) as top level nodes. You only can add nodes to the groups in the top level and to subgroups.
- You cannot delete nodes that are delivered with the product.
- You cannot move nodes. Instead, you must duplicate the node and hide the original node.

---

**Note:** While you can customize the global navigator menu, you cannot customize the global home menu or the global preferences menu.

---

### 6.1.3 Before You Begin Customizing the Navigator Menu

Before you customize the navigator menu, you should be familiar with the Oracle Fusion application architecture that enables customization, as described in [Chapter 1, "Customizing and Extending Oracle Fusion Applications."](#) You should also understand the typical workflows for working with customizations, as described in [Chapter 2, "Understanding the Customization Development Lifecycle."](#)

You will need to do the following before you can begin customizing the navigator menu:

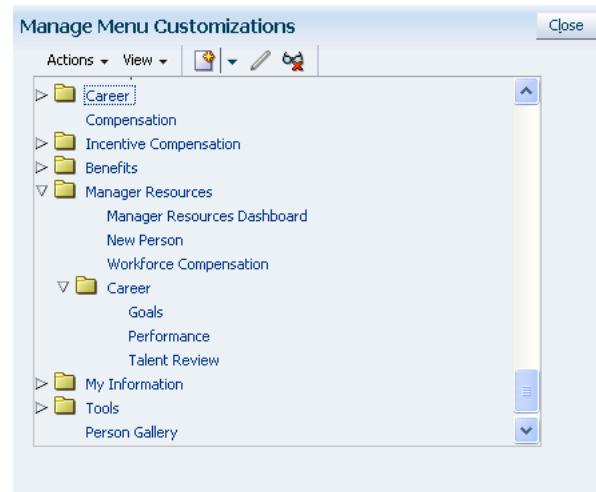
- If you are making minor changes, you can hide the changes until you have completed your customizations. However, if you are making more than minor changes, you might want to instead create a sandbox. For more information see [Section 2.2, "Using the Sandbox Manager."](#)
- You must have the necessary function and data security privileges to access the Manage Menu Customizations task. Contact your security administrator for details.

- Open the Manage Menu Customizations task. To access this task, choose **Setup and Maintenance** from the Administration menu in the Oracle Fusion Applications global area and search for the task.

## 6.2 Adding Groups

You arrange the menu by building a hierarchy of nested groups. For example, in [Figure 6–4](#) the Manager Resources group contains the Career group.

**Figure 6–4** *Menu Groups and Sub Groups*



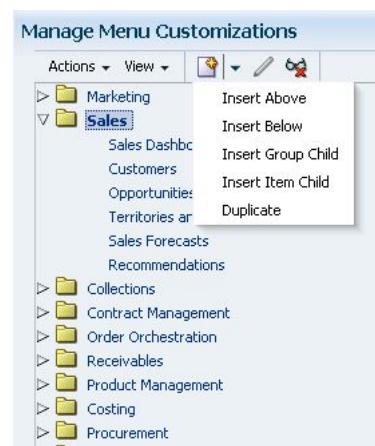
### Task: Navigate the Menu Hierarchy

You can use the View menu to expand or collapse a group of nodes, scroll to the first group, or scroll to the last group in the navigation tree. You can also right-click a node and access similar actions to facilitate tree navigation.

### Task: Add a Group

As shown in [Figure 6–5](#), you can insert a group above or below a peer group or insert a group child. You edit a group by defining a label and specifying whether the group should be rendered. You typically hide the group until all changes have been completed.

**Figure 6–5** *Action Menu*



## 6.3 Adding Items

Navigator menu items are URL links. There are two types of links — links to UI Shell pages in Oracle Fusion applications and links to external applications and web sites. Menu items can be added to the top level groups and their subgroups. Note that you cannot add menu items as top level nodes.

### Task: Adding an Item

To add an item, you navigate to the item's group and insert the item above or below another item, as shown in [Figure 6–5](#). You can also choose to duplicate an existing item. You must supply the menu label and either link to a UI Shell page or link to an external web site or application, as described in the following tasks. The Create Item Node page is shown in [Figure 6–6](#).

**Figure 6–6 Create Item Node Page**

The screenshot shows the 'Create Item Node' dialog box. It contains the following fields:

- \* Required Label: An input field with a placeholder.
- Rendered: A checked checkbox.
- Focus View ID: An input field.
- Web Application: A dropdown menu.
- Secured Resource Name: An input field.
- Application Stripe: An input field.
- Destination: An input field.
- Page Parameters List: An input field.

At the bottom right are 'Save' and 'Cancel' buttons.

### Task: Linking to a UI Shell Page

If the new item points to a UI Shell page in an application, you must provide the name of the web application and the view ID of the target page. The quickest way to obtain the web application name and view ID is to copy them from an existing menu item that links to the same page. Otherwise, the web application name is the same as the context root for the application, and the view ID can be obtained from the `id` attribute for the page's `<view>` tag in the product's `public_html/WEB-INF/adfc-config.xml` file.

If you want to secure access to the target UI Shell page from the menu item, you will need to provide the name of the secured resource and the name of the policy store's application stripe. When an end user clicks the link, Oracle Fusion Applications checks the secured resource and Lightweight Directory Access Protocol (LDAP) policy store to determine whether the user has permission to view the page.

If there is another menu item that points to the same page, you can get the secured resource name and application stripe from that item. Otherwise, the application stripe can be obtained from the `jps.polycystore.applicationid` parameter in the application's `weblogic-application.xml` file. Examples of application stripes are `crm`, `fscm`, and `hcm`. The secured resource name is the name of the web page's page definition file. By default, the page definition files are located in the `view.PageDefs` package in the Application Sources directory of the view project. If the corresponding JSF page is saved to a directory other than the default (`public_html`), or to a subdirectory of the default, then the page definition will also be saved to a package of

the same name. An example of a secured resource name is `oracle.apps.view.pageDefs.CaseList_Form_Attach_UIShellPagePageDef`.

A UI Shell page might take parameters and display or act differently based on the parameters that are passed in. For example if accessing a page from one group in the menu hierarchy, the parameter might be set to `status="Open"` and if accessing the page from a different group, the parameter might be set to `status="Closed"`. If the page takes parameters, you can use the **Page Parameters List** text box to provide a semicolon-delimited string of name value pairs, such as `org=m1;context=s1`. You can use expression language (EL) to specify the parameters. If the EL evaluates to an Object, the `toString` value of that Object is passed as the value of the parameter.

---

**Note:** Do not enter a value in the **Destination** text box. If a destination is provided, the menu item is treated as a link to an external web page and the target view ID and web application values are ignored.

---

#### Task: Linking to an External Web Site or Application

You can link a menu item to an external web site or application. Clicking on the menu item displays the target in a new browser window or tab, depending on the browser configuration.

To link to an external web site or application, provide the URL in the **Destination** text box and provide the menu label. Do not enter information in any other fields. If you need to pass parameters, put the parameters in the URL.

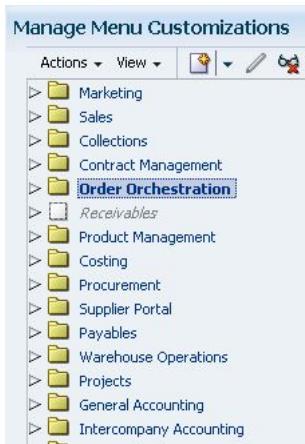
## 6.4 Hiding and Showing Nodes

While you are creating or working with a group or item, you might want to prevent end users from accessing the node. You can hide the group or item while you are working with it, and then show the node when you have completed the task.

**Tip:** For major changes that need to be tested and approved, you might want to use the sandbox manager instead of hiding and showing nodes. For more information, see [Section 2.2, "Using the Sandbox Manager."](#)

The Manage Menu Customizations page shows all nodes. The nodes that appear in italics are hidden from end users, as shown in [Figure 6–7](#).

**Figure 6–7 Hidden Node Shown in Italics**



### Task: Hiding or Showing a Node

When you add a node, you can select the Rendered checkbox to display the node, or clear the checkbox to hide it. You can edit the node later to change how it is rendered.



---

# Customizing and Extending BPMN Processes

This chapter describes how to use the Oracle Business Process Composer to customize and extend Business Process Modeling Notation (BPMN) processes by creating and modifying BPM projects based on project templates and deploying those projects to runtime.

This chapter includes the following sections:

- [Section 7.1, "About Customizing BPMN Processes"](#)
- [Section 7.2, "Creating an Oracle BPM Project"](#)
- [Section 7.3, "Customizing BPMN Processes"](#)
- [Section 7.4, "Publishing Oracle BPM Projects"](#)
- [Section 7.5, "Deploying an Oracle BPM Project"](#)
- [Section 7.6, "Configuring BPMN Processes within an Oracle Fusion Application"](#)

## 7.1 About Customizing BPMN Processes

The Customer Relationship Management (CRM) product family of Oracle Fusion Applications uses Business Process Management Notation (BPMN) processes to define some process flows used within the application. Specifically, some CRM applications use BPMN processes to define approval workflows.

BPMN is a standard notation for modeling the behavior of business processes. See "Modeling Business Processes with Oracle BPM" in the *Oracle Fusion Middleware Business Process Composer User's Guide for Oracle Business Process Management* for general information on BPMN.

BPMN processes are contained within an Oracle BPM project. BPM projects contain all of the resources required for a functioning BPM application, including BPMN processes and SOA artifacts such as business rules and human tasks.

Using Oracle Business Process Composer, you can customize the BPMN processes used within Oracle Fusion applications by creating, modifying and deploying an Oracle BPM project created from a project template.

Oracle Fusion Applications provide default project templates that you can use to create new process flows. See the product-specific documentation from Oracle Enterprise Repository available from Oracle Support for a list of the default BPM project templates provided by Oracle Fusion Applications.

See "Introduction to Project Templates" in the *Oracle Fusion Middleware Business Process Composer User's Guide for Oracle Business Process Management* for general information on working with project templates.

A BPM project template is pre-populated with all of the required resources for implementing BPMN processes within an Oracle Fusion application. This includes the BPMN processes that define the process flow as well as the necessary technical components that enable the processes to communicate with other parts of the application. After customizing a BPM project, you can deploy it to runtime.

The technical components contained within a BPM project are called the business catalog. The business catalog contains various reusable services that a BPMN process can use to connect to other components of the application, including other processes, systems, and databases.

The business catalog contains the following reusable components:

**Table 7–1 Business Catalog Components Available in Business Process Composer**

Business Catalog Component	Description
Services	Services are used to connect a BPMN process with other processes, systems, and services, including BPEL processes, databases.  See "How to Create New Services in the Business Catalog" in the <i>Oracle Fusion Middleware Business Process Composer User's Guide for Oracle Business Process Management</i> for more information.
Human tasks	Human tasks enable you to define how end users interact with your BPMN processes. Human tasks are implemented in a BPMN process using the user task.  See "Adding User Interaction to Your Process" in <i>Oracle Fusion Middleware Business Process Composer User's Guide for Oracle Business Process Management</i> .
Business rules	Oracle business rules are statements that describe business policies or describe key business decisions.  See "Introduction to the Business Rules Task" in <i>Oracle Fusion Middleware Business Process Composer User's Guide for Oracle Business Process Management</i> for information on implementing business rules within a BPMN process.

### 7.1.1 Oracle Tools for Customizing and Extending BPMN Processes

Oracle Fusion Applications provide multiple tools for customizing and extending BPMN processes. These tools are described in [Table 7–2](#).

**Table 7–2 Oracle Tools for Customizing and Extending BPMN Processes**

This tool...	Allows you to...
Oracle SOA Composer	Customize business rules, domain value maps, and approval configuration and assignment rules at runtime. See <a href="#">Section 12.2, "Customizing SOA Composites"</a> for more information.  These customizations are performed directly on a running application. They do not require redeployment of the BPM project containing the BPMN process.

**Table 7–2 (Cont.) Oracle Tools for Customizing and Extending BPMN Processes**

This tool...	Allows you to...
Oracle BPM Worklist	Customize approval configuration and assignment rules. See <a href="#">Section 12.2, "Customizing SOA Composites"</a> for more information. These customizations are performed directly to a running application. They do not require redeployment of the BPM project containing the BPMN process.
Oracle Business Process Composer	Customize BPMN processes by creating and deploying BPM projects based on project templates. This functionality is described in the following sections.
Oracle BPM Studio (Oracle JDeveloper)	Customize project templates. See <a href="#">Chapter 13, "Customizing and Extending Oracle BPM Project Templates."</a>

## 7.1.2 What You Can Do with BPMN Processes at Runtime

There are two types of runtime customization that you can make to BPMN processes. These are described in the following sections.

### 7.1.2.1 What You Can Customize Using Oracle SOA Composer and Oracle BPM Worklist

BPMN processes utilize multiple SOA components, including business rules and approval workflow. Using the Oracle SOA Composer and Oracle BPM Worklist, you can customize the following components used by the BPMN processes of a running Oracle Fusion application:

- Oracle business rules
- Domain value maps
- Approval assignment rules in human workflows such as customizing the approval flow for a specific customer.

These customizations can be made directly to a running Oracle Fusion application without having to redeploy the BPM project. See [Section 12.2, "Customizing SOA Composites"](#) for information on using Oracle SOA Composer or Oracle BPM Worklist to make these customizations.

---

**Note:** Any changes you make to the deployed, running BPMN processes of an Oracle CRM application will not be preserved if you later redeploy the BPM project that contains them.

---

### 7.1.2.2 What You Can Customize Using Oracle Business Process Composer

Using Oracle Business Process Composer, you can make the following customizations to a BPM project created from a project template:

- Customize an existing BPMN process.
- Create new BPMN processes.
- Create simple data objects.
- Create and modify some business catalog components.

[Table 7–3](#) lists which business catalog components can be customized or created using *Business Process Composer*.

**Table 7–3 List of Business Catalog Components**

<b>Business Catalog Component</b>	<b>Can be created using Business Process Composer?</b>	<b>Can be customized using Business Process Composer?</b>
Business rules	No	Yes
Human tasks	Yes	Yes
	You can create human tasks using Oracle Business Process Composer, however not all functionality of a human task can be customized.	
Services	Yes	Yes
Errors	No	No

See [Section 7.2, "Creating an Oracle BPM Project"](#) for information on creating a new BPM project based on a project template.

Changes to the business catalog that cannot be made using Business Process Composer must be made to the project template using Oracle BPM Studio. See [Section 7.1.3, "What You Cannot Do with BPMN Processes at Runtime"](#) for more information.

### 7.1.3 What You Cannot Do with BPMN Processes at Runtime

Often, it is necessary to make changes to a BPMN process that cannot be performed using Business Process Composer. The following tasks must be performed using JDeveloper:

- Modify project templates
- Create or customize some business catalog components, including:
  - Configuring advanced properties of web services
  - Creating new adapters and mediators
  - Creating new business rules
  - Creating or customizing errors
  - Configuring advanced features of human tasks, including:
    - \* Complex assignment support
    - \* Auto-generated task flow
    - \* Business rules within human tasks
- Create complex data objects

To create or customize these components, process developers must modify the project template and republish it to the Oracle BPM repository. After a project template is revised, you can use Business Process Composer to create and deploy BPM projects. See [Chapter 13, "Customizing and Extending Oracle BPM Project Templates"](#) for more information.

### 7.1.4 Before You Begin Customizing BPMN Processes

Before customizing BPMN processes using Business Process Composer, you should be familiar with the Oracle Fusion application architecture that enables customization, as described in [Chapter 1, "Customizing and Extending Oracle Fusion Applications."](#)

You should also understand the typical workflows for customization and extensibility, as described in [Chapter 2, "Understanding the Customization Development Lifecycle."](#)

You should be familiar with how to model business processes using the Business Process Modeling and Notation (BPMN) standard. See "Modeling Business Processes with Oracle BPM" in the *Oracle Fusion Middleware Business Process Composer User's Guide for Oracle Business Process Management*.

To create and deploy projects based on project templates, you must be granted the following applications roles:

- BPMCreateNewProject
- BPMCreateNewProjectFromTemplate
- BPMComposerDeveloper
- BPMComposerDesigner
- BPMComposerDocumentProject

Your security administrator must grant these application roles to you. See "Introduction to Security Roles in Oracle Business Process Composer" in the *Oracle Fusion Middleware Business Process Composer User's Guide for Oracle Business Process Management*. for more information.

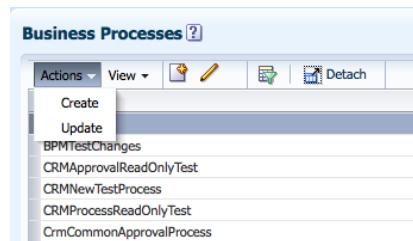
## 7.2 Creating an Oracle BPM Project

You can use Oracle Business Process Composer to customize or extend BPMN processes. BPMN processes are contained within an Oracle BPM project. After launching Oracle Business Process Composer the first step in modifying a BPMN process is to create a new project based on a project template or to open an existing BPM project.

### **Task: Access Oracle Business Process Composer**

To customize BPMN processes within an Oracle CRM application, you must access Business Process Composer from CRM Application Composer.

- Access CRM Application Composer
  - To access CRM Application Composer, in the **Navigator** menu, click **Application Composer**.
  - To edit or create business processes, you will need the correct privileges. Please contact your security administrator for details.
- Access Business Process Composer
  - To access Business Process Composer from CRM Application Composer, click **Business Processes** then perform one of the following as shown in [Figure 7-1](#):
    - \* To create a new business process select **Create** from the **Actions** menu.
    - \* To modify an existing process select a business process from the list, then select **Update** from the **Actions** menu.

**Figure 7–1 Actions Menu of the CRM Application Composer**

After selecting one of the above, the Business Process Composer login screen appears. See "Signing On to Oracle Business Process Composer" in the *Oracle Fusion Middleware Business Process Composer User's Guide for Oracle Business Process Management* for more information.

- To customize BPMN processes, you must be assigned the correct security roles within Business Process Composer. See [Section 7.1.4, "Before You Begin Customizing BPMN Processes"](#) for more information.

#### **Task: Create a New BPM Project Based on a Project Template**

Oracle Fusion applications do not ship with running BPMN processes out-of-the-box. In order to integrate BPMN processes within Oracle Fusion applications, you must create a new BPM project based on a project template, deploy the project to runtime, then configure the Oracle Fusion application to use the BPMN processes of the deployed BPM project.

Business Process Composer enables you to create new BPM projects based on project templates. For information on creating a new BPM project, see "How to Create a New Project From a Project Template" in the *Oracle Fusion Middleware Business Process Composer User's Guide for Oracle Business Process Management*.

Refer to the product-specific documentation from Oracle Enterprise Repository available from Oracle Support for a list of the default BPM project templates provided by Oracle Fusion Applications. By default, project templates are stored in the Templates folder of the BPM repository.

#### **Task: Open an Existing BPM Project**

If you have already created a new BPM project based on a template, you can continue to customize the project before deploying it to runtime.

For information on opening an existing BPM project, see "How to Open a Project Using the Project Browser" in the *Oracle Fusion Middleware Business Process Composer User's Guide for Oracle Business Process Management*.

## **7.3 Customizing BPMN Processes**

After creating a new BPM project based on a project template, you can modify the BPMN processes within the project. Additionally, you can customize the business catalog components within the BPM project.

#### **Task: Open a BPMN Process**

See "How to Open a Business Process" of *Oracle Fusion Middleware Business Process Composer User's Guide for Oracle Business Process Management* for information on opening a BPMN process.

### Task: Customize a BPMN Process

You can alter the flow of your BPMN process by adding, removing, or modifying BPMN flow objects.

See "Working with Flow Elements" in the *Oracle Fusion Middleware Business Process Composer User's Guide for Oracle Business Process Management* for more information on using the process editor to modify BPMN processes.

See "Modeling Business Processes with Oracle BPM" in the *Oracle Fusion Middleware Business Process Composer User's Guide for Oracle Business Process Management* for specific information on BPMN flow objects.

### Task: Assign Business Catalog Components to a BPMN Flow Object

You can use Business Process Composer to assign reusable services from the business catalog to different BPMN flow objects.

The business catalog components and their corresponding flow objects are shown in [Table 7–4](#).

**Table 7–4 BPMN Flow Objects and Their Corresponding Services**

BPMN Flow Object	Business Catalog Component
User task	Human tasks
Service task	Services, including web services and adapters
Business rules task	Business rules
Error events	Errors

See "The Business Catalog" in the *Oracle Fusion Middleware Business Process Composer User's Guide for Oracle Business Process Management* for more information on working with reusable services and the business catalog.

### Task: Add Milestones to the Activity Guide

The activity guide of a BPM project defines a set of milestones. Each BPM project contains one activity guide. An activity guide can contain multiple milestones.

A milestone is a specific set of tasks that the process participant has to complete. A milestone is complete when the user successfully runs a specific set of tasks in the milestone.

Each milestone is defined by a set of human workflow tasks. Each human workflow task is itself a task flow that may require the collaboration of multiple participants in various roles.

See "Using Guided Business Processes to Set Project Milestones" in *Oracle Fusion Middleware Business Process Composer User's Guide for Oracle Business Process Management*. for information on creating milestones.

### Task: Customize Business Rules

Business rules enable dynamic decisions to be made at runtime that allow you to automate policies, computations, and reasoning while separating rule logic from underlying application code.

---

**Note:** You can use Oracle Business Process Composer to modify business rules within an Oracle BPM project. These changes are made to the runtime application when the project is deployed.

You can use the SOA Composer to make runtime changes directly to the runtime environment, without deploying a project. See [Section 12.2, "Customizing SOA Composites"](#) for more information making runtime changes to a BPMN process.

---

For more information about customizing rules using Oracle Business Process Composer, see "Using Oracle Business Rules" in the *Oracle Fusion Middleware Business Process Composer User's Guide for Oracle Business Process Management*.

#### **Task: Create or Customize Human Tasks**

Human tasks enable you to integrate human interaction with connectivity to systems and services as part of an end-to-end process flow. Human tasks are responsible for handling all interactions with the users or groups participating in the business process.

Using Business Process Composer, you can create and customize human tasks. See "Working with Human Tasks" in *Oracle Fusion Middleware Business Process Composer User's Guide for Oracle Business Process Management* for information on creating and configuring human tasks.

#### **Task: Customize Expressions**

Expressions are used to evaluate the data used within your process. Different flow objects use expressions to determine which path within the process to follow.

Expressions are used to configure the following BPMN elements:

- Conditional Sequence Flows
- Complex Gateways
- Timer Events
- Data Associations
- Loop Markers
- Multi-Instance Markers
- User Task Advanced Properties

You can customize the expressions used within a BPMN process using Oracle Business Process Composer.

See "Working with Expressions" in the *Oracle Fusion Middleware Business Process Composer User's Guide for Oracle Business Process Management*.

## **7.4 Publishing Oracle BPM Projects**

In Oracle BPM, publishing a project refers to the process of saving it in the BPM repository where projects and project templates are stored. Process developers can publish project templates to the repository where you can access them to create new BPM projects.

The BPM repository can also be used to share BPM projects and project templates between other Business Process Composer and JDeveloper users.

In the BPM repository, projects and project templates are stored in the following default folder:

**Table 7–5 Default Location of BPM Projects and Project Templates in the BPM Repository**

Type	Location
BPM Projects	/bpm/drafts
BPM Project Templates	/bpm/templates

Within these default folders you can create additional subfolders to organize your projects and project templates.

#### **Task: Publish a Project**

See "How to Save Changes to a Project" in the *Oracle Fusion Middleware Business Process Composer User's Guide for Oracle Business Process Management* for information on how to publish a project to the BPM repository.

## **7.5 Deploying an Oracle BPM Project**

After creating a new BPM project, you must deploy it to runtime in order for the BPMN processes contained within it to be accessible to Oracle Fusion applications.

After customizing a project and publishing it, you must deploy the project to runtime. After the project is deployed, the BPMN processes within it are accessible to the Fusion applications that implement them.

#### **Task: Deploy a BPM Project**

The first time you deploy a new BPM project, you must export it as a SAR file. A SAR file is an archive of a SOA composite application that, like a BPM project, contains all of the required resources of a deployable application.

See "How to Export a Project as a SAR File" in the *Oracle Fusion Middleware Business Process Composer User's Guide for Oracle Business Process Management*.

After the project is exported as a SAR file, your system administrator must deploy it to runtime using Oracle Enterprise Manager. See the *Oracle Fusion Middleware Administrator's Guide for Oracle SOA Suite and Oracle Business Process Management Suite* for more information.

#### **Task: Re-deploy a BPM Project**

After the initial deployment of a BPM project, you can redeploy the BPM project containing any additional customizations you need to make. You can redeploy the BPM project to runtime directly from Business Process Composer.

---

**Note:** If you want to revise the BPMN processes within a previously deployed BPM project, you must deploy the revised BPM project using the identical name of the original deployed project.

---

Any changes you have previously made to a deployed, running BPMN processes using Oracle SOA Composer or Oracle BPM Worklist will not be preserved after redeploying the BPM project.

---

See "How to Deploy a Project to Run Time" in the *Oracle Fusion Middleware Business Process Composer User's Guide for Oracle Business Process Management* for information on deploying a BPM project to runtime.

Business Process Composer uses the Deployer role to enable users to deploy projects directly to Oracle BPM run time. This is a role used specifically by Business Process Composer. When a user is assigned the Deployer security role, the **Deploy Project** option is available from the Tools menu.

---

**Note:** You may want to deploy a BPM project using the same name as the project and project template to make it easier to associate the deployed project with its design time version.

---

#### **Task: Configure Fusion Applications to Use Business Processes**

After deploying a BPM project, you must use CRM Application Composer to add an object workflow that conditionally responds to a record modification event for the business object. This enables the business object to call the corresponding BPMN process. See [Section 7.6, "Configuring BPMN Processes within an Oracle Fusion Application"](#) for more information on integrating BPMN processes within an Oracle CRM application.

## **7.6 Configuring BPMN Processes within an Oracle Fusion Application**

After deploying a BPM project you must configure an Oracle Fusion application to use the BPMN processes. After a BPM project is deployed, you must use CRM Application Composer to add an object workflow that conditionally responds to a record modification event for the business object. See [Section 4.2, "Editing Objects"](#) for more information on adding object workflows.

---

# Customizing Reports and Analytics

This chapter describes how to use Oracle Business Intelligence to customize and extend reports and analytics for Oracle Fusion Applications.

This chapter includes the following sections:

- [Section 8.1, "About Customizing Reports and Analytics"](#)
- [Section 8.2, "Customizing Reports"](#)
- [Section 8.3, "Customizing Analytics"](#)

## 8.1 About Customizing Reports and Analytics

In Oracle Fusion Applications, reports and analytics are built using Oracle Business Intelligence:

- Reports are built with Oracle Business Intelligence Publisher (BI Publisher) and are usually highly-formatted, detailed documents.
- Analytics are analyses and dashboards built with Oracle Business Intelligence Presentation Services. Analyses are queries based on real-time, transactional or operational data that provide answers to business questions. Dashboards provide personalized views of corporate and external information. A dashboard consists of one or more pages that contain content, such as analyses, links to websites, BI Publisher reports, and so on.

## 8.2 Customizing Reports

This section describes how to use Oracle Business Intelligence Publisher to customize and extend reports for Oracle Fusion Applications. It includes the following sections:

- [Section 8.2.1, "About Customizing Reports"](#)
- [Section 8.2.2, "Customizing Layouts"](#)
- [Section 8.2.3, "Customizing Data Models"](#)
- [Section 8.2.4, "Creating Custom Reports"](#)
- [Section 8.2.5, "Adding Translations"](#)
- [Section 8.2.6, "Tasks Required to Run Custom Reports with Oracle Enterprise Scheduler Service"](#)
- [Section 8.2.7, "Securing Custom Reports and Related Components"](#)
- [Section 8.2.8, "Making Reports Available to Users in the Reports and Analytics Pane"](#)

## 8.2.1 About Customizing Reports

Reports extract the data from your applications and present it in the formats required for your enterprise. Reports provide the information you need for internal operations and statutory compliance; reports also provide the business documents for communicating with your customers. Many product-specific reports are provided with Oracle Fusion Applications; for example, the invoice register, the pick slip report, the payroll summary, the journals report, and the customer credit memo. To meet the specific needs of your enterprise, you may need to customize the reports provided or you may need to create new reports to capture and present different data.

Understanding the BI Publisher reporting architecture will help you to understand the report customization scenarios and tasks. A report in BI Publisher consists of the following components:

- A data model that defines the data source, data structure, and parameters for the report. A data model can be used by multiple reports. Each report has one data model.
- One or more layouts to define the presentation, formatting, and visualizations of the data. A report may have multiple layouts of the data model.
- A set of properties that specify runtime and formatting options

Optionally, a report may also include:

- Translations to provide localized versions of a report

### 8.2.1.1 About Tasks Required When Customizing Reports That Are Submitted by the Oracle Enterprise Scheduler

Many Oracle Fusion applications use the Oracle Enterprise Scheduler to submit report requests to BI Publisher. For reports that require parameter value input from users, the Oracle Enterprise Scheduler uses a parameter view object (VO) to collect and validate parameter values to send to BI Publisher.

After you customize the report in BI Publisher, additional tasks are required to set up the Oracle Enterprise Scheduler job definition to run your report from Oracle Fusion applications. If your report customization includes customizing parameters that are passed to BI Publisher, you will likely need to customize the parameter VO.

This chapter highlights the additional tasks required for these related components, however, you must also reference the following documents for full descriptions of how to customize them and how to configure the Oracle Enterprise Scheduler job definition to integrate the parameter VO:

- For customizing Oracle Enterprise Scheduler job definitions, see [Chapter 14, "Customizing and Extending Oracle Enterprise Scheduler Jobs"](#) and the chapter "Working with Extensions to Oracle Enterprise Scheduler" in *Oracle Fusion Applications Developer's Guide for Oracle Enterprise Scheduler*
- For information on how to customize view objects in Oracle Fusion Applications, see [Chapter 11, "Customizing and Extending ADF Application Artifacts"](#)
- For the full description of view objects and creating them in JDeveloper, see the chapter "Defining SQL Queries Using View Objects" in the *Oracle Fusion Middleware Fusion Developer's Guide for Oracle Application Development Framework*.

### 8.2.1.2 What You Can Customize

In many cases, BI Publisher reports delivered with Oracle Fusion Applications will contain the appropriate data elements you expect, but may not provide the

presentation of the data just as you would like it. BI Publisher enables you to customize the layouts for reports leveraging the prebuilt data models. If the reports provided by Oracle Fusion Applications do not include the data you require, you can create a new report based on a custom data model.

---

**Important:** Do not edit the predefined report objects. If you change a report and a subsequent patch includes a new version of the report, the patch overwrites any customizations. If subsequent patches do not include a new version of the report, the customizations are retained. When customizing reports, always make a copy of the original object and edit the copy.

---

Some common report customization scenarios are:

Customization Use Case	Described in
Edit the layout of a report provided with an application  For example: Add your company logo to the Receivables Credit Memo report.	<a href="#">"Customizing Layouts" on page 8-6</a>
Add a new layout to a report provided with an application  For example: Design a new form letter users can select when they run the Receivables Credit Memo.	<a href="#">"Customizing Layouts" on page 8-6</a>
Create a new report based on a data model provided with an application  For example: Add a field to a data model	<a href="#">"Creating Custom Reports" on page 8-23</a>
Edit a data model provided with an application  For example: Define a new query against Oracle Fusion applications tables	<a href="#">"Editing Existing Data Models" on page 8-21</a>
Create a new data model  For example: Define a new query against Oracle Fusion applications tables	<a href="#">"Creating a New Data Model" on page 8-22</a>
Create a new report based on a custom data model	<a href="#">"Creating Custom Reports" on page 8-23</a>

### 8.2.1.3 Related Report Customization Tasks

Depending on how a report is implemented in Oracle Fusion applications and the type of customization you make you may also have to perform additional tasks to implement your custom report in the system.

If you create a new report and you wish to schedule this report through Oracle Enterprise Scheduler Service, you must create an Oracle Enterprise Scheduler Service job for the report. If you require Oracle Enterprise Scheduler to send parameter values to the BI Publisher report via a parameter view object, you must also create the view object.

If you create a custom layout and you require translations of the layout, you must also provide the translations. Oracle Business Intelligence Publisher provides a tool for extracting the translation file for some layout types. The translation file can be translated into the required languages then uploaded to the report.

**Table 8–1 Related Report Customization Tasks**

Related Report Customization Task	Described in
Create the Parameter VO for Oracle Enterprise Scheduler Service	"Customizing Parameters for Reports Submitted Through Oracle Enterprise Scheduler" on page 8-25
Create the Oracle Enterprise Scheduler Service job definition and job	"Tasks Required to Run Custom Reports with Oracle Enterprise Scheduler Service" on page 8-24
Provide translations	"Adding Translations" on page 8-24
Secure reports and related components	"Securing Custom Reports and Related Components" on page 8-26

#### 8.2.1.4 Tools for Customizing Reports

Customize reports either within the Oracle BI Publisher application or using one of the tools or applications listed in [Table 8–2](#). For the list of certified versions of third-party applications see "System Requirements and Certification" in the *Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher*.

**Table 8–2 Tools for Customizing Report Components**

Component	Tool for Customizing
Report Data Model	BI Publisher's data model editor
Report properties	BI Publisher's report editor
Layout	See <a href="#">Table 8–3, "Tools for Customizing Layouts"</a>

The following table shows the tools required to customize each template type:

**Table 8–3 Tools for Customizing Layouts**

Layout Template Type	Tool for Customizing
RTF template	Microsoft Word with BI Publisher's Template Builder for Word
BI Publisher template (XPT)	BI Publisher's layout editor
PDF template	Adobe Acrobat Professional
Excel template	Microsoft Excel with BI Publisher's Template Builder for Excel
eText Template	Microsoft Word

#### 8.2.1.5 Before You Begin Customizing Reports

Before you customize reports, you should be familiar with the Oracle Fusion application architecture that enables customization, as described in [Chapter 1, "Customizing and Extending Oracle Fusion Applications."](#) You should also understand the typical workflows for working with runtime customizations, as described in [Chapter 2, "Understanding the Customization Development Lifecycle."](#)

In addition, be familiar with the following BI Publisher-specific requirements:

**Ensure that you have proper permissions for editing and creating Oracle Business Intelligence Presentation catalog objects**

An administrator must grant you the BIAdministrator role (or a role that includes the BIAdministrator role) as well as write permissions on objects in the catalog that you will be editing.

For more information about setting permissions in the catalog, see "Managing Objects in the Oracle BI Presentation Catalog" in the *Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition (Oracle Fusion Applications Edition)*.

**Understand how the patching process for catalog objects impacts customizations**

If a patch includes an update to a catalog object that was delivered with an Oracle Fusion application (for example, the Payables Invoice Register report) the patch will overwrite any customizations applied to the original report. To avoid overwriting a customization, do not customize a predefined Oracle Fusion application object in place; create a copy of the object and customize the copy.

**Understand how permissions are set for and inherited by catalog objects**

For a user to view a report, the user's role must have read permissions on every object referenced by a report. Permissions can be inherited from the folder in which the object resides.

For ease of maintenance, Oracle recommends that you place customized reports within the same folder as the original; or, if creating a new report that you place it within the same folder as other reports for the same job role.

If you choose to create new folders, bear in mind the catalog security permissions required (see "Managing Objects in the Oracle BI Presentation Catalog" in the *Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition (Oracle Fusion Applications Edition)*).

**Be aware of any application-specific guidelines for customizing reports**

See product-specific documentation from Oracle Enterprise Repository available from Oracle Support.

**Be aware of property settings that determine how the report can be run and viewed**

Some reports are configured to run only through an external application or through the Oracle Enterprise Scheduler. While customizing a report, you may want to configure it temporarily for viewing online to facilitate testing. See [Task: Review Report Settings for Online Viewing](#) for information about these settings.

**Know how to navigate to Oracle Business Intelligence Presentation catalog objects**

Navigate to the Oracle BI Presentation catalog as follows:

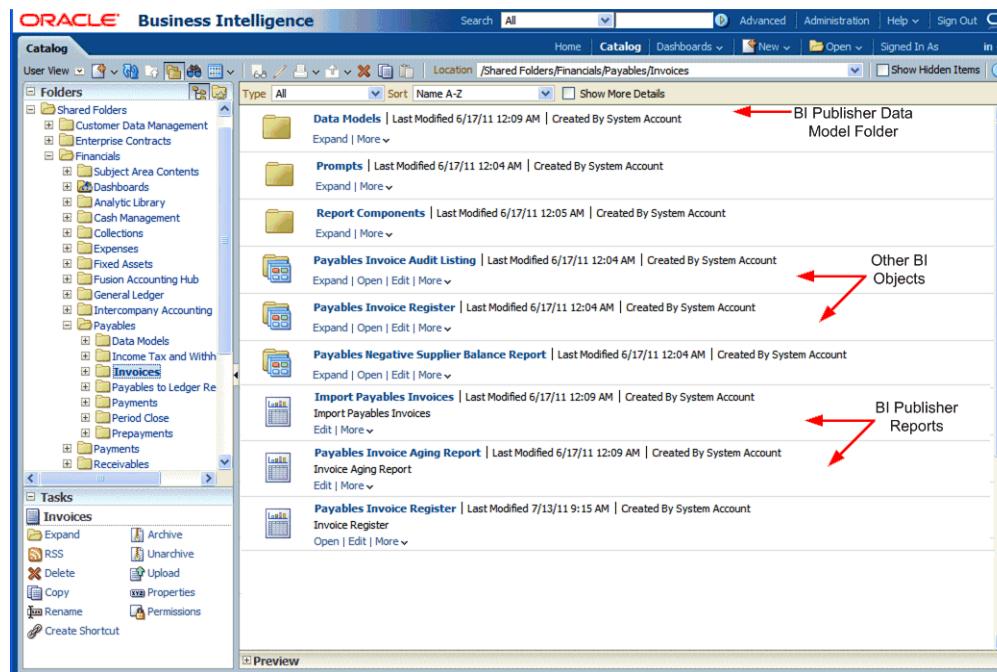
On the **Navigator**, under **Tools**, click **Reports and Analytics**. In the **Reports and Analytics** pane, click **Browse Catalog**.

Alternatively, log in to Oracle Business Intelligence directly (example: <http://host:port/analytics/saw.dll>).

Oracle Fusion Applications reporting objects are organized by product family in the catalog typically as follows:

- Top Level: Shared Folders

- Product Family Folder (example: Financials)
  - \* Product folder (example: Payables)
  - Report group folders (example: Invoices)
    - Reports
    - Data Model folder

**Figure 8–1 BI Presentation Catalog**

## 8.2.2 Customizing Layouts

The layout defines the presentation of the report data. All reports delivered with Oracle Fusion Applications include at least one predefined layout template file that defines the presentation components (such as tables and labeled fields) and maps the elements from the data model to these components. The layout also defines font sizes, styles, borders, shading, and can also include images, such as a company logo.

To customize a layout, you edit the layout template. BI Publisher supports several types of templates to support different report layout requirements. Most of the templates delivered with Oracle Fusion Applications are rich text format (RTF) templates created using Microsoft Word. Some predefined templates are BI Publisher layout templates created using BI Publisher's layout editor. These are for interactive and more visually appealing layouts. A third type is the eText template, which is used specifically for electronic data interchange (EDI) and electronic funds transfer (EFT).

BI Publisher templates can also be created using Adobe PDF, Microsoft Excel, Adobe Flash, and XSL-FO.

Some examples of layout customizations are:

- Style changes only, no changes to data mapping

This is the simplest type of customization. Examples are removing the predefined logo from the report and inserting your own or simply modifying colors and font styles. For these changes you can download the predefined template and edit it.

Because there are no changes to the data mapping, style changes do not require sample data from your report, however, having sample data available will enable testing of the template from your desktop.

- Changes to mapped data elements within the existing layout

An example of this type of customization is adding or removing a table column or data field from the report layout. For these changes you must have sample data to load to the layout editing tool. You can download the predefined template, load your sample data, insert the required elements, preview your template, then upload your customized template back to the report definition.

- New presentation of the data

To create a new layout, start by opening the layout editing tool and loading the sample data to begin designing your custom layout.

### Task: Generate Sample Data from the Report

The layout tools require sample data to enable the mapping of data fields to layout components in the report. You can generate sample data in the following ways:

- From the report data model
- From the report viewer

#### To generate sample data from the data model:

1. Navigate to the report data model in the BI Presentation catalog and click **Edit**.

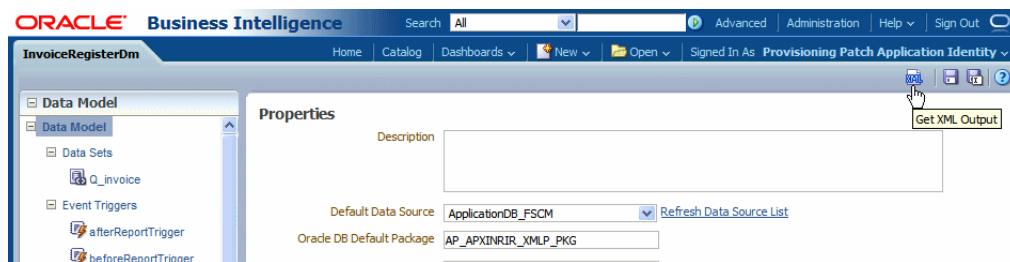
---

**Tip:** If you are not sure which data model is the source for a particular report, click the report **Edit** link. The data model is displayed in the upper left corner of the report editor.

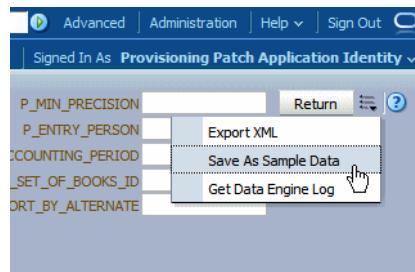
---

2. In the data model editor, click **Get XML Output** as shown in [Figure 8–2](#).

**Figure 8–2 Getting XML Output from a Data Model**



3. Enter values for any required parameters, select the **Number of rows to return**, and click **Run**.
4. To save the sample data to the data model, click the **Actions** menu and then click **Save As Sample Data**, as shown in [Figure 8–3](#):

**Figure 8–3 Saving Sample Data to a Data Model**

If you are designing an RTF template, you may also wish to **Export the XML** to save the file to a local client for use with the Template Builder for Microsoft Word.

5. Click **Return**. Then save the data model.

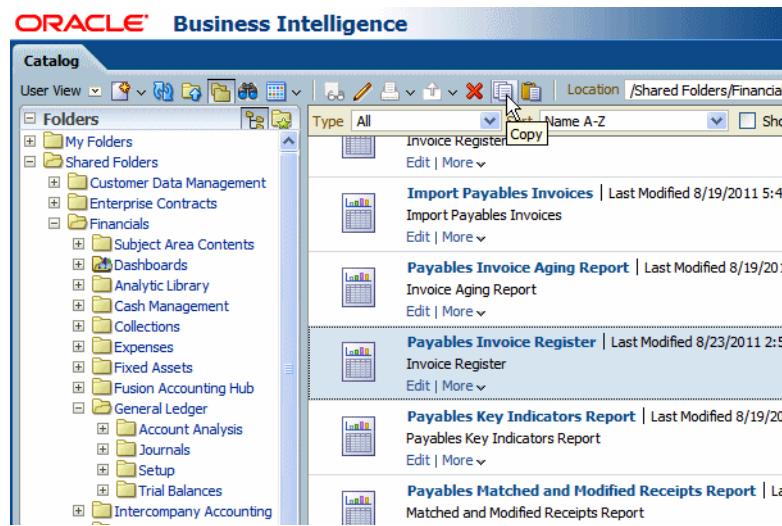
#### To save sample data from the report viewer:

1. Navigate to the report in the Business Intelligence catalog.
2. Click **Open** to run the report in the report viewer with the default parameters.
3. On the **Actions** menu, click **Export**, then click **Data**.
4. Save the data file.

#### **Task: Make a Copy of the Original Report**

Navigate to the report in the BI Presentation catalog. To make a copy:

1. Select the report by clicking anywhere in the row. On the catalog toolbar, click **Copy** as shown in [Figure 8–4](#):

**Figure 8–4 Copying a Predefined Report in the BI Presentation Catalog**

2. Click **Paste** to place the copy in the current folder. When you paste into the same folder, the copy is created as "copy of original report".
3. Rename the copied report. For example: Payables Invoice Register Custom, as shown in [Figure 8–5](#)

**Figure 8–5 Renaming the Copied Report**

4. (Optional) Update the report description. In the catalog, click the **Edit** link. In the report editor, click the **Properties** link at the top of the page. Enter the **Description** for your report, for example: "Payables invoice register report with custom layout".

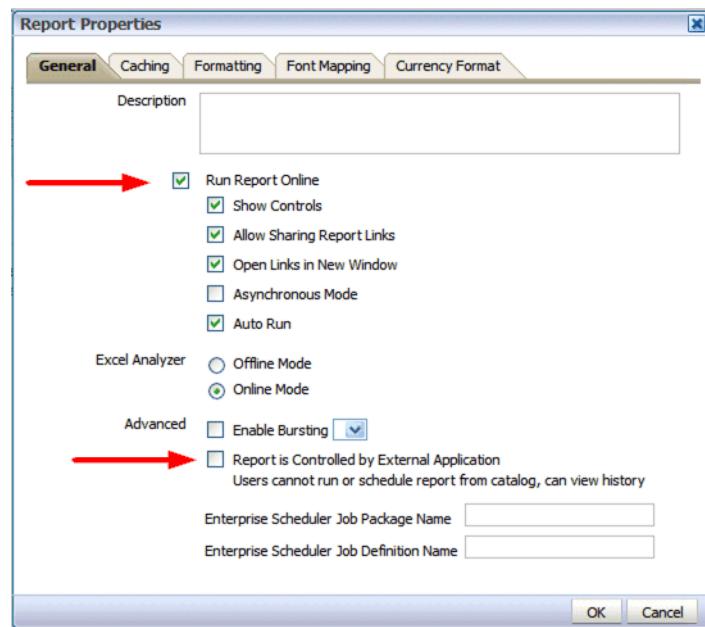
#### **Task: Review Report Settings for Online Viewing**

Some reports are configured to view only through an external application or through the Oracle Enterprise Scheduler. If you wish to view your report online while you are customizing it, ensure that the following properties are set as noted.

- Report Properties Settings
  - **Run Report Online** - must be enabled
  - **Report is Controlled by External Application** - must be disabled

To navigate to the report **Properties** dialog:

1. Navigate to your report copy in the catalog and click **Edit**.
2. In the report editor, click the **Properties** link at the top of the page.
3. In the **Properties** dialog, select **Run Report Online** and clear **Report is Controlled by External Application**. These properties are shown in [Figure 8–6](#).

**Figure 8–6 Report Properties Dialog**

- Layout Setting

The layout setting **View Online** must be enabled.

To view the layout settings:

In the report editor, click **View a List**. Ensure that the **View Online** property is enabled.

#### **Task: Edit or Create the Layout**

To design an RTF layout, see [Section 8.2.2.1, "Customizing RTF Templates."](#)

To design a layout using the BI Publisher layout editor, see [Section 8.2.2.2, "Customizing BI Publisher Templates."](#)

To design one of the other supported layout types, see the corresponding chapter in the *Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher*:

- Creating PDF Templates
- Creating Excel Templates
- Creating eText Templates

#### **Task: Upload the Template File to the Report Definition**

If you created a layout using the layout editor, the layout is automatically saved to the report definition and you can skip this step. For all other layout types upload the template file to the report definition as follows:

1. Navigate to your custom report in the catalog and click **Edit**.
2. On the report definition page, click **View a List**. On the table that lists the layouts, click **Create** (the "+" button).
3. Click **Upload** to upload the template file from your local directory.
4. Save the report definition.

#### **Task: Configure the Layout Settings**

---

**Tip:** To hide the original layout from users, clear the **Active** box.

---

To view or edit the current settings applied to a layout:

1. In the report editor, click **View a List**. The List View is shown in [Figure 8–7](#)

**Figure 8–7 Report Layouts Shown in the List View**

Name	Template File	Type	Output Formats	Default Format	Default Layout	Apply Style Template	Active	View Online	Locale	Reorder
Invoice Register Report	InvoiceRegisterReport.rtf	rtf	HTML,PDF,RTF,Excel	HTML	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	English	
Custom Invoice Register	InvoiceRegisterReport_c.rtf	rtf	HTML,PDF,RTF,Excel	HTML	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	English	

Set the following properties for your custom layout:

- Output Formats

Output formats are the file formats available for the generated report, such as PDF, HTML, RTF, Excel. Depending on the requirements of a report you may want to limit the output formats available to users. The output formats available will depend on the Template File Type.

- Default Output Format

If multiple output formats are available for the report, the default output format will be generated by default when the report is run in the report viewer.

- Default Layout

If multiple layouts are available for the report, the default layout will be presented first in the report viewer. One and only one layout must be selected as the default layout.

- Apply Style Template

If a style template is assigned to this report, use this field to apply the style template to the layout.

- Active

Active layouts are displayed to report consumers. Inactivate the layout to make it unavailable to report consumers.

- View Online

Layouts that can be viewed online are available to report consumers from the report viewer. If this property is not checked, the layout is available only for scheduled jobs.

#### **Task: Delete a Layout**

To delete a layout from the report:

1. In the report editor, click **View a List**.
2. Locate the layout that you wish to delete in the table and click anywhere within its row to select it.
3. Click the **Delete** toolbar button. Click **OK** in the confirmation dialog.

#### **Task: (Conditional) Create the Oracle Enterprise Scheduler Job to Run the Custom Report**

If this report replaces a report that relies on an Oracle Enterprise Scheduler job for submission, you must create a custom Oracle Enterprise Scheduler job to point to your report copy. See [Section 8.2.6, "Tasks Required to Run Custom Reports with Oracle Enterprise Scheduler Service."](#)

#### **Task: (Conditional) Enable Access to the Report Through the Reports and Analytics Pane**

See [Section 8.2.8, "Making Reports Available to Users in the Reports and Analytics Pane."](#)

#### **8.2.2.1 Customizing RTF Templates**

Most templates delivered with Oracle Fusion Applications are RTF templates. An RTF template is a rich text format file that contains the layout instructions for BI Publisher to use when generating the report. RTF templates are created using Microsoft Word. BI Publisher provides an add-in to Microsoft Word to facilitate the coding of layout instructions. For more information see the chapter "Creating RTF Templates Using the

"Template Builder for Word" in the *Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher*.

---

**Note:** If you are designing a new layout for the report, consider using the BI Publisher layout editor. The layout editor is an online layout editing tool launched from the report editor. See [Section 8.2.2.2, "Customizing BI Publisher Templates."](#)

---

### Before you begin:

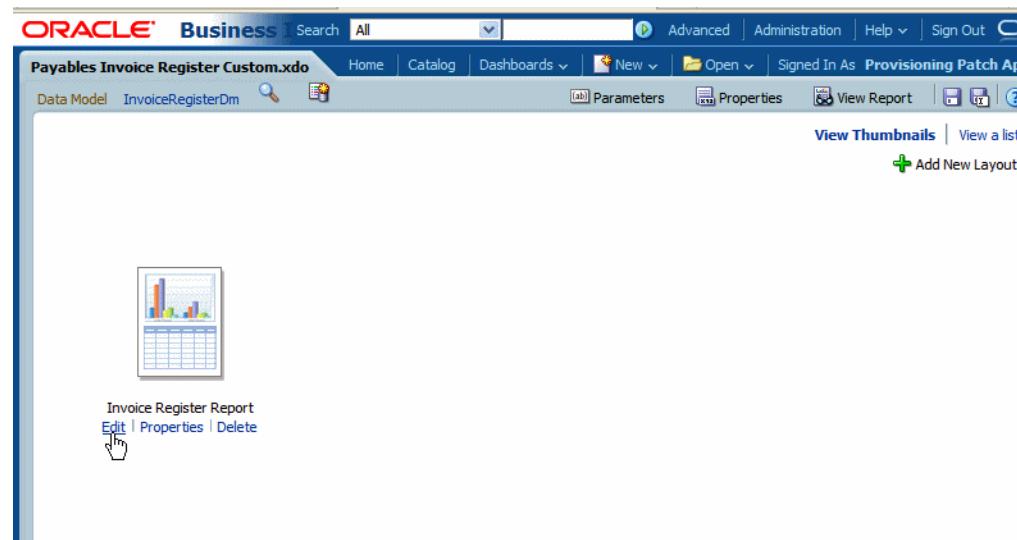
Ensure that your local client has a supported version of Microsoft Word. BI Publisher provides the Template Builder for Microsoft Word to facilitate RTF template design. Download the tool from the Oracle Business Intelligence home page. For more information see the chapter "Creating RTF Templates Using the Template Builder for Word" in the *Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher*.

### Task: Download the Template File

If you are creating a new layout, skip this step.

If you are modifying a predefined layout, navigate to the report in the catalog and click **Edit**. In the report editor, click the **Edit** link of the layout to download the RTF file to your local client, as shown in [Figure 8–8](#):

**Figure 8–8 Downloading the Predefined Layout**



### Task: Edit the RTF File in Microsoft Word

Open the downloaded RTF template file in Microsoft Word; or, if you are creating a new template, open Microsoft Word.

Load the sample data to the Template Builder for Word Add-in.

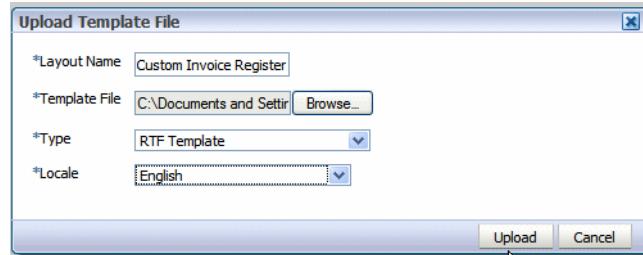
Edit or create the layout following the guidelines in the Template Builder help or in the chapter "Creating RTF Templates Using the Template Builder for Word" and "Creating an RTF Template" in the *Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher*.

Ensure that you save the file as Rich Text Format (rtf).

### Task: Upload the Template File to the Report Definition

In the catalog, open the report in the report editor and click **View a List**. On the table that lists the layouts, click **Create** (the "+" button). Click **Upload** to upload the RTF file from your local directory as shown in [Figure 8–9](#).

**Figure 8–9 Uploading the Template File**



### Task: Add Translations for the Layout

If this report requires translations, see [Section 8.2.5, "Adding Translations."](#).

**8.2.2.1.1 Customizing an RTF Template: Examples** This section includes two examples of RTF template customizations:

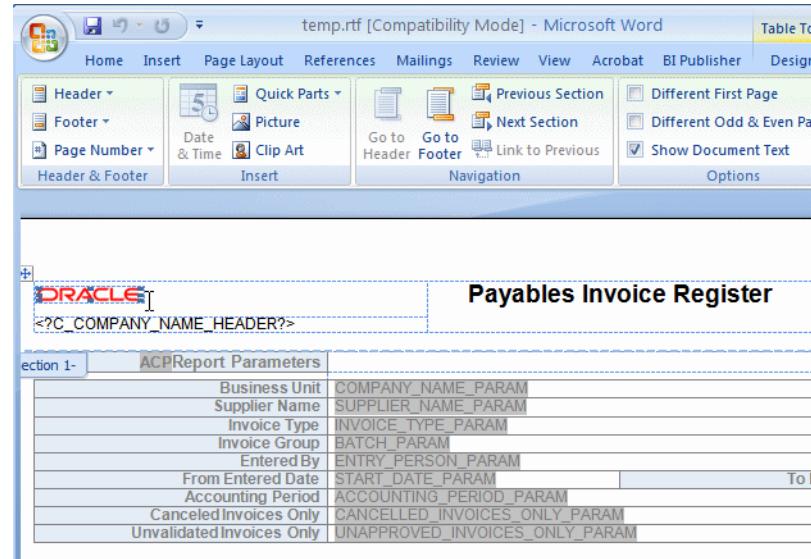
- [Changing the Inserted Logo in a Predefined Template](#)
- [Customizing an RTF Template Using an Existing Data Model](#)

#### **Example 8–1 Changing the Inserted Logo in a Predefined Template**

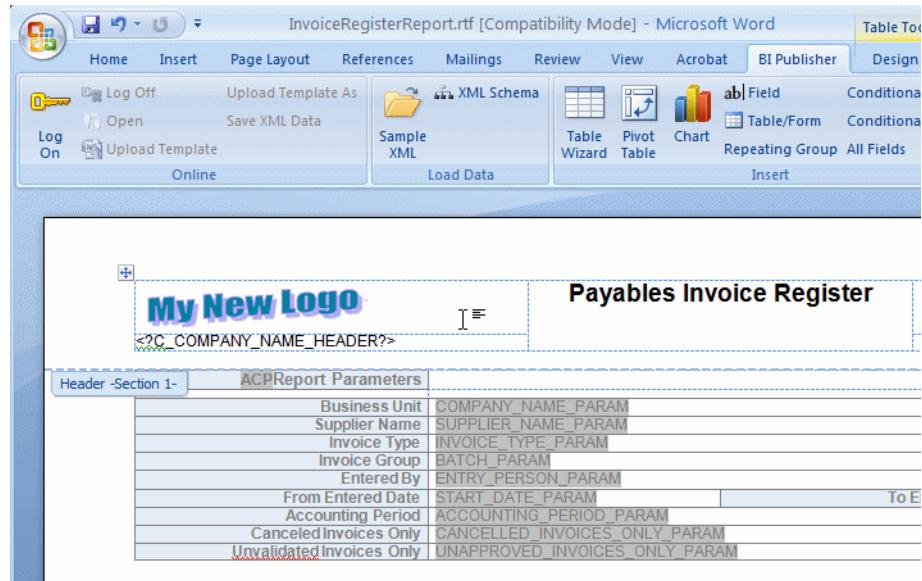
The Payables Invoice Register report layout includes a standard logo in the report header. To change the inserted logo using Microsoft Word 2007:

1. In Microsoft Word, delete the Oracle logo as shown in [Figure 8–10](#).

**Figure 8–10 Selecting the Oracle Logo Prior to Deletion**

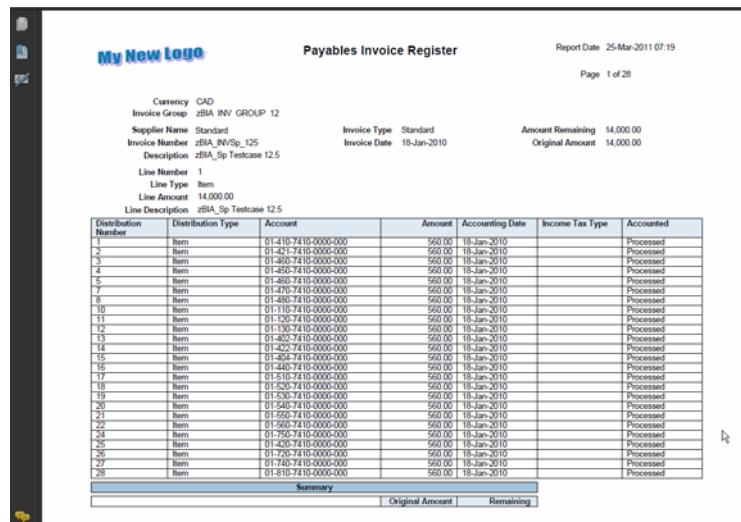


2. On the **Insert** tab in the **Illustrations** group click **Picture**. Select your company logo image file to insert it to the Word document. Resize the image as necessary. An example is shown in [Figure 8–11](#).

**Figure 8–11 Inserting the Logo in Microsoft Word**

**Tip:** If the template file includes section breaks, you must insert the new logo for each section header.

3. If you downloaded sample data, you can test the template on your desktop: On the BI Publisher tab, in the **Preview** group click **PDF**. The Template Builder will apply the sample data you loaded and generate a PDF output document, as shown in [Figure 8–12](#):

**Figure 8–12 Preview of Custom Layout Template****Example 8–2 Customizing an RTF Template Using an Existing Data Model**

This example demonstrates the general steps for customizing an RTF template using an existing data model. In this example, the Payables Invoice Register data model is used to create a new layout to display a summary for each currency. This example demonstrates general report layout concepts and features of the BI Publisher Template

Builder for Microsoft Word. Follow the steps in this topic and the guidelines in *Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher*.

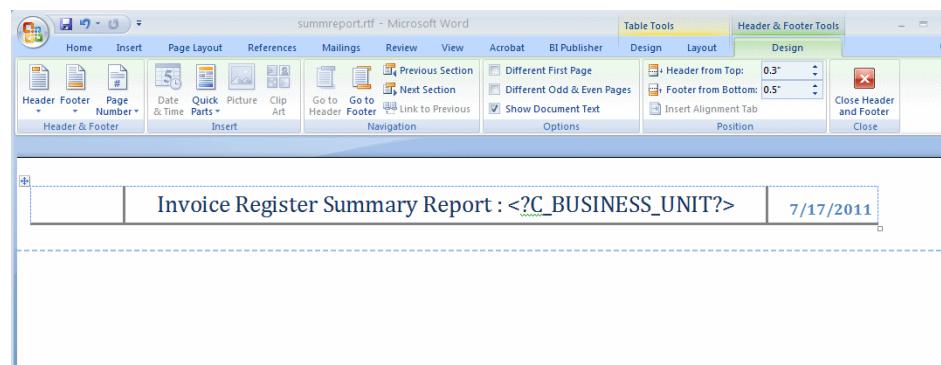
The final report layout is shown in the following figure:

Invoice Register Summary Report : Vision Operations					7/17/2011
Currency: CAD					
Supplier	Invoice	Date	Invoice Amount	Amount Remaining	
Company 789	INV00012398756	1/14/2010	1,000.00	1,000.00	
Company 123	CO123 INVSp_125	1/18/2010	14,000.00	14,000.00	
Company 123	CO123 Inv_1	1/22/2010	5,000.00	5,000.00	
CV SuppA04	CO123 INVSp_084	1/8/2010	16,000.00	16,000.00	
Currency Total Remaining: 36,000.00					
Currency: EUR					
Supplier	Invoice	Date	Invoice Amount	Amount Remaining	
Company 789	INV00012398756	1/14/2010	1,000.00	1,000.00	
Paper Supplier, Inc	CO123_INVS_096	1/17/2010	6,400.00	6,400.00	
Currency Total Remaining: 7,400.00					
Currency: GBP					
Supplier	Invoice	Date	Invoice Amount	Amount Remaining	
Company L	KK Approval Test 2901 01	1/28/2010	5,000.00	5,000.00	
Company L	KK Approval Test 2901 02	1/28/2010	2,500.00	2,500.00	
Amenity Supplier	100000015121640	12/11/2009	1.00	1.00	
Supplier C320	56812023 SuppC	1/14/2010	1,000.00	1,000.00	
Office Supplies, Inc.	CO123_INVS_063	1/17/2010	12,000.00	12,000.00	
Currency Total Remaining: 20,500.00					

To create this layout:

1. Download to your local client sample data from the Payables Invoice Register data model (InvoiceRegisterDM).
2. In Microsoft Word, on the **BI Publisher** tab, in the **Load Data** group, click **Sample Data**. Select your downloaded file and click OK.
3. Using Microsoft Word functionality, insert the page header. Type the text for the header, and insert the field for the Business Unit as shown in [Figure 8–13](#):

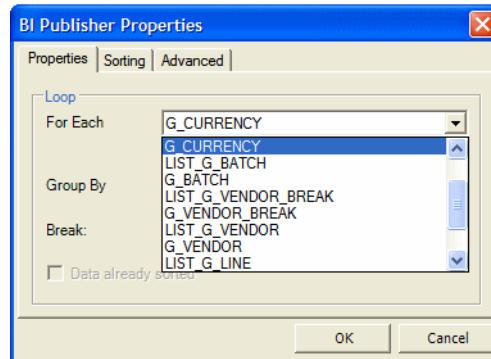
**Figure 8–13 Inserting the Header to the RTF Template**



4. In this example, the report will repeat the table of invoices for each occurrence of the currency code. To create this behavior, insert a repeating group based on the element C\_CURRENCY\_CODE. To insert the repeating group:
  - a. On the **BI Publisher** tab, in the **Insert** group, click **Repeating Group**.

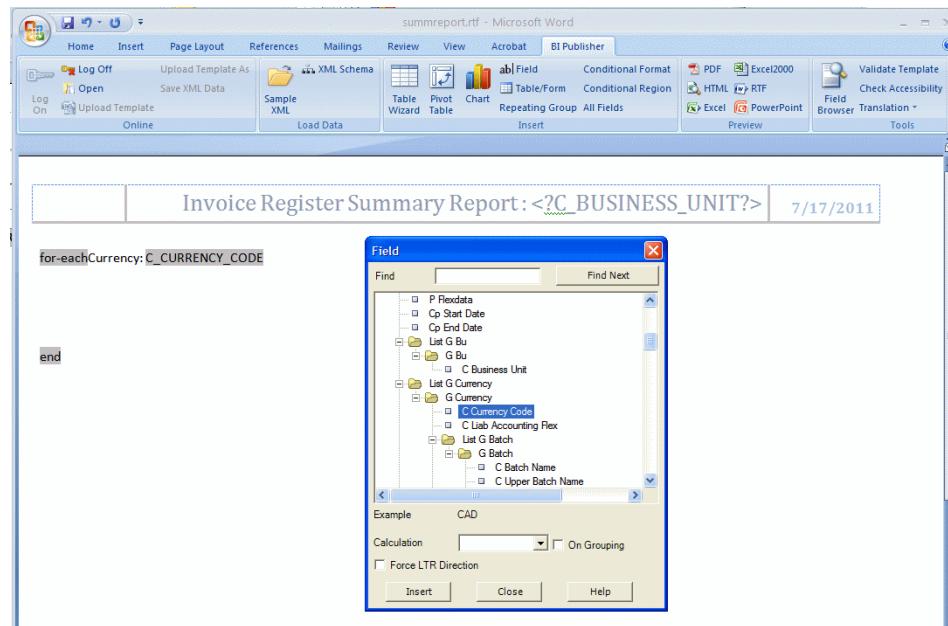
- b. In the **BI Publisher Properties** dialog, select the G\_CURRENCY group as shown in [Figure 8–14](#):

**Figure 8–14 Selecting a Repeating Group**

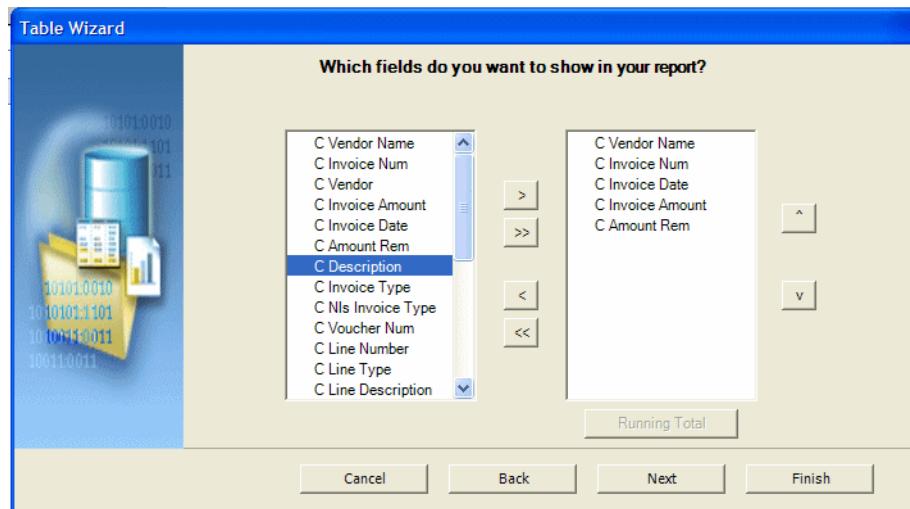


- c. To display the field value, type the text "Currency:" after the for-each tag. To insert the element from the data: On the **BI Publisher** tab, in the **Insert** group, click **Field**. The **Field** dialog will display. Select the C\_CURRENCY\_CODE element, as shown in [Figure 8–15](#)

**Figure 8–15 Inserting the Currency Code Field**



5. Use the table wizard to insert the table: On the **BI Publisher** tab in the **Insert** group, click **Table Wizard**. Make the following selections:
- For the report format, select **Table**.
  - For the **Data Set** select the VENDOR group.
  - Select the fields to display in your table: C Vendor Name, C Invoice Num, C Invoice Date, C Invoice Amount, and C Amount Rem, as shown in [Figure 8–16](#):

**Figure 8–16 Selecting Fields for the Table**

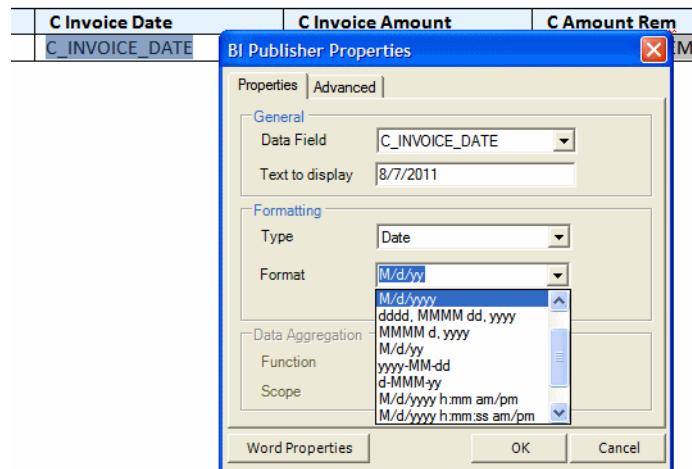
- Click **Finish**. The inserted table will display with the column names from the data; also, if you preview the report, you will notice that no formatting is applied to number and date fields.
6. Edit the column names by simply editing the text in the column header row.
  7. Apply formatting to the date and number fields. To apply formatting to the date field:

---

**Note:** This example shows simple number formatting. If your report requires locale-driven number and date formatting, see the topic "Number, Date, and Currency Formatting" in the *Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher*.

---

- a. Right-click the date field in the table and select **BI Publisher** then **Properties** from the menu.
- b. In the **BI Publisher Properties** dialog, update the following (shown in [Figure 8–17](#)):  
Set the **Type** to Date.  
Select the date **Format** from the list.  
Enter **Text to display**, for example: 8/7/2011.

**Figure 8–17** *Formatting the Date Field*

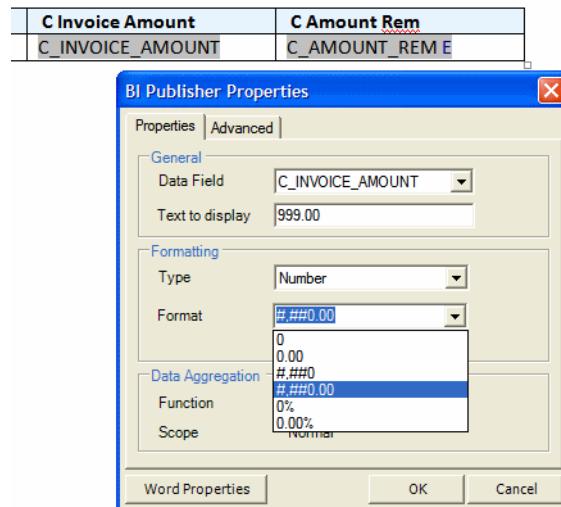
To apply formatting to a number field:

- Right-click the amount field in the table and select **BI Publisher** then **Properties** from the menu.
- In the **BI Publisher Properties** dialog, update the following (shown in [Figure 8–18](#)):

Set the **Type** to Number

Select the number **Format** from the list.

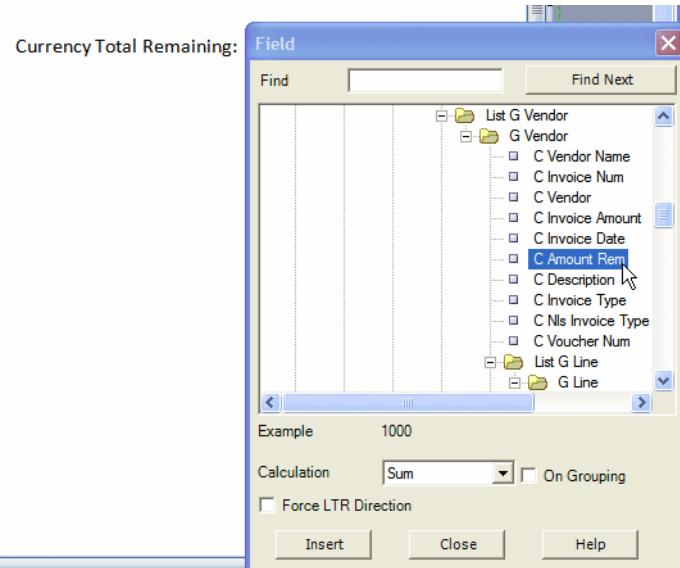
Enter **Text to display**, for example: 999.00.

**Figure 8–18** *Formatting the Number Field*

- To display the total for each currency, enter the text: "Currency Total Remaining:" beneath the table, but inside the for-each / end tags. Insert the field as follows:
  - On the **BI Publisher** tab, in the **Insert** group, click **Field**.

- b. In the **Insert Field** dialog, click the "C Amount Rem" field (under the G Vendor group).
- c. In the **Calculation** field, select **Sum** from the list as shown in [Figure 8–19](#)

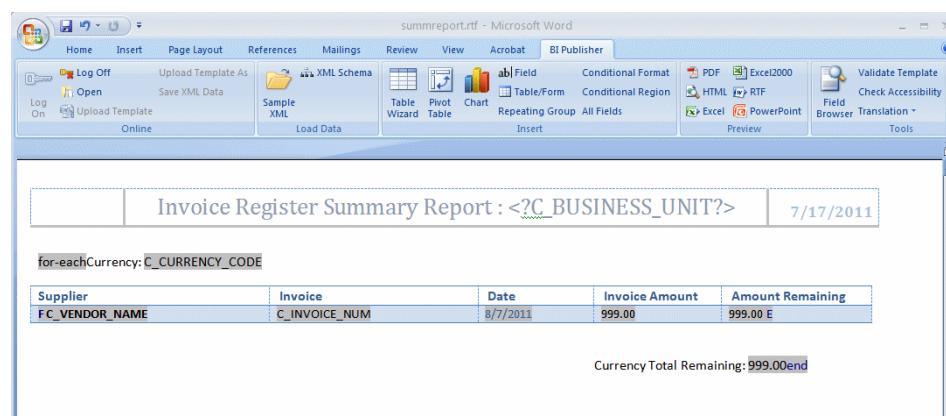
**Figure 8–19 Inserting and Summing the Total Field**



- d. Click **Insert**.
  - e. Format the field as a number, as described in Step 7.
9. Perform any additional formatting of colors, fonts, borders, and text strings using Microsoft Word functionality.

The completed template will appear as shown in [Figure 8–20](#). To preview the template, click the **PDF** button in the BI Publisher **Preview** group.

**Figure 8–20 Finished RTF Template**



### 8.2.2.2 Customizing BI Publisher Templates

BI Publisher templates are created using the BI Publisher Layout Editor - a design tool that provides an intuitive, drag and drop interface for creating pixel perfect reports in PDF, RTF, Excel, PowerPoint, and HTML. It also provides dynamic HTML output that supports lightweight interaction through a browser.

BI Publisher layouts are best suited for reports of simple to medium complexity. The interactive view is only available for BI Publisher layouts, therefore choose this layout type when you want your report consumers to interact with the report (change sorting, apply filters, and so on).

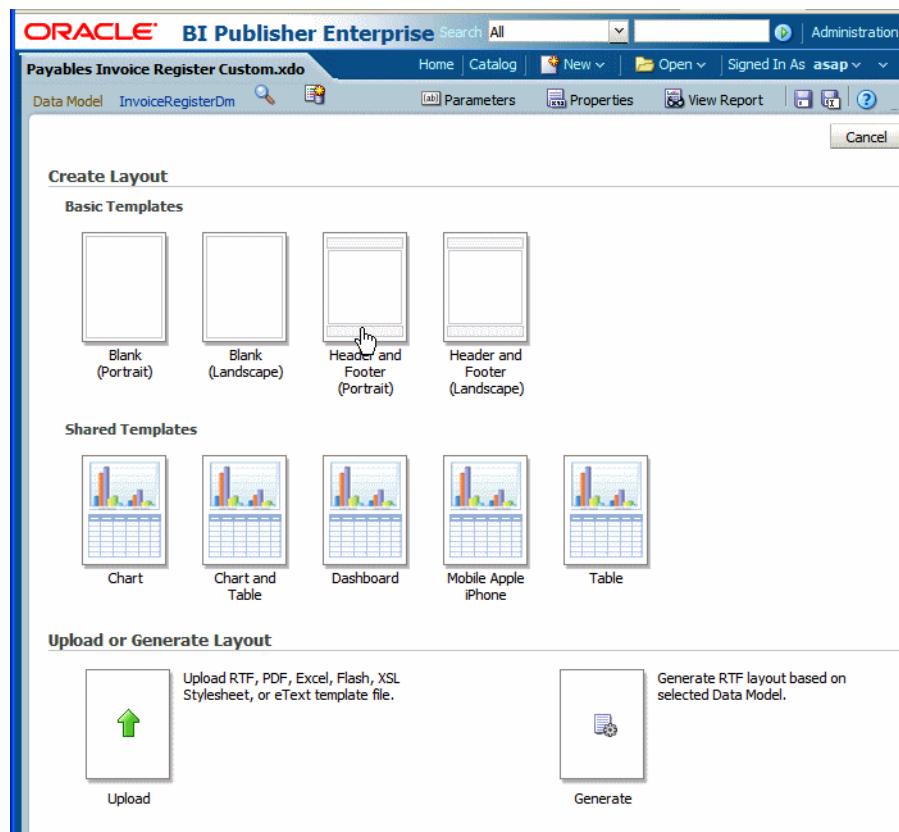
### Before you begin:

The BI Publisher layout editor requires the data model to include sample data. To save sample data to the data model, you must generate data according to the first option described in "[Task: Generate Sample Data from the Report](#)".

### Task: Launch the Layout Editor from the Report Definition

Navigate to the report and click **Edit**. Click **Add New Layout**. Under the **Create Layout** region, click one of the Basic Templates or Shared Templates to launch the layout editor, as shown in [Figure 8–21](#).

**Figure 8–21 Selecting a Boilerplate to Launch the Layout Editor**



### Task: Create and Save the Layout

Create the layout using the guidelines in the online help or in the chapter "Creating a BI Publisher Layout Template" in the *Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher*. Click **Save** to save the layout to the report definition.

### Task: Add Translations for the Layout

If this report requires translations, see [Section 8.2.5, "Adding Translations."](#).

## 8.2.3 Customizing Data Models

A data model defines the source and structure of the data for a report. At runtime BI Publisher executes the data model to supply the XML data for a report. Create a custom data model when the data models supplied by your application do not provide the data required in your report. If you need to customize the data that is captured by the report data model, you can either edit an existing data model or create a custom data model.

### **Before You Begin: Understand the Use of Parameter VOs with Oracle Enterprise Scheduler**

If the report requires user input for parameter values and the report is submitted by the Oracle Enterprise Scheduler to BI Publisher, the Oracle Enterprise Scheduler uses a parameter VO to present and validate parameter values in the Oracle Fusion application. The values are then sent by Oracle Enterprise Scheduler to BI Publisher for execution of the data model.

In the parameter VO the parameters are defined as attributes and must be named incrementally as ATTRIBUTE1, ATTRIBUTE2, and so on. In the BI Publisher data model, you must define the parameters in the same order as they are defined in the parameter VO. The mapping of the value passed by Oracle Enterprise Scheduler to the BI Publisher data model is by order alone.

For example, in a BI Publisher data model assume you have defined the following parameters in this order:

- P\_BUSINESS\_UNIT
- P\_VENDOR\_ID
- P\_INVOICE\_TYPE

In the parameter VO you must define ATTRIBUTE1 to retrieve the value for P\_BUSINESS\_UNIT; ATTRIBUTE2 to retrieve the values for P\_VENDOR\_ID; and ATTRIBUTE3 to retrieve the values for P\_INVOICE\_TYPE.

Ensure that any edits you make to the ordering of parameters in the parameter VO, the BI Publisher data model, or the Oracle Enterprise Scheduler job definition are reflected in all places. See [Section 8.2.6.2, "Customizing Parameters for Reports Submitted Through Oracle Enterprise Scheduler."](#)

### **8.2.3.1 Editing Existing Data Models**

Do not directly edit a data model delivered with an Oracle Fusion application. Instead, make a copy and edit the copy. To ensure that the proper privileges are inherited by the copied object, maintain the copy in the same folder as the original.

#### **Task: Copy the Existing Data Model**

Navigate to the data model in the BI Presentation catalog. To make a copy:

1. Click anywhere in the object's row to select the data model.
2. On the catalog toolbar, click the **Copy** toolbar button; then click the **Paste** toolbar button to paste the copy into the same folder.
3. To rename the copy, click the **More** link, and then click **Rename**. Enter the new name, for example: InvoiceRegisterDM Custom.

**Task: Customize the Data Model in the Data Model Editor**

Click the **Edit** link in the catalog to open the data model in the data model editor. See "Using the Data Model Editor" in the *Oracle Fusion Middleware Data Modeling Guide for Oracle Business Intelligence Publisher (Oracle Fusion Applications Edition)* for general information about using the data model editor and the specific chapter for the component you wish to edit, for example:

- To add or delete a field from the SQL query, see the topic "Editing an Existing Data Set" in the chapter "Creating Data Sets."
- To add or delete a bursting definition, see the chapter "Adding Bursting Definitions."
- To edit parameters, see "Adding Parameters and Lists of Values."

---

**Important:** If the report will use the Oracle Enterprise Scheduler to collect parameter values from end users, then the parameter logic, list of values and display attributes that are presented in the application interface are defined in a parameter VO and the Oracle Enterprise Scheduler job definition. The parameter values are then passed to BI Publisher when the job is submitted.

In this case, edit the parameters in the parameter VO then ensure that the parameters in the BI Publisher data model are in the same order as they are defined in the parameter VO. Do not create the list of values in the BI Publisher data model for reports submitted via Oracle Enterprise Scheduler.

---

### 8.2.3.2 Creating a New Data Model

To create a data model:

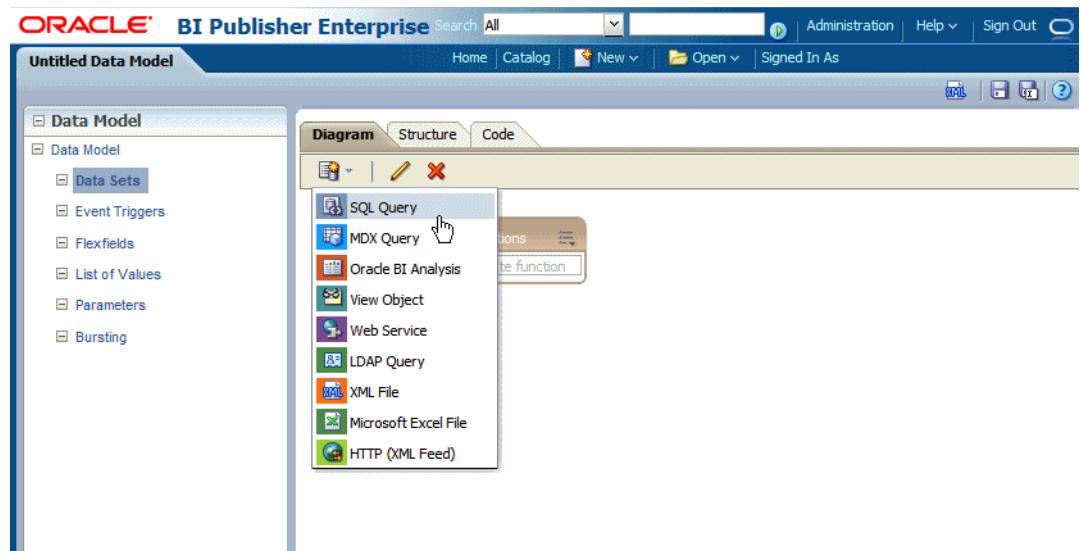
1. Open the Data Model editor.

On the global header, click **New**, then click **Data Model** to open the data model editor.

2. Configure the data model properties. For more information see "Setting Data Model Properties" in the *Oracle Fusion Middleware Data Modeling Guide for Oracle Business Intelligence Publisher (Oracle Fusion Applications Edition)*.
3. If your data model will include event triggers you must enter the **Oracle DB Default Package**.
4. Create the data set.

You will most likely create data sets from SQL queries against your Oracle Fusion application data tables. The data model editor also supports using an Oracle BI analysis as its source of data as well as entity view objects (VOs) created in Oracle JDeveloper. See "Creating Data Sets" in the *Oracle Fusion Middleware Data Modeling Guide for Oracle Business Intelligence Publisher (Oracle Fusion Applications Edition)* for more information about all supported data set types and how to create them.

[Figure 8–22](#) shows the menu of data set types available.

**Figure 8–22 Creating a SQL Data Set**

**5.** Create the optional components.

A data model can include the following components:

- Event triggers
- Flexfields
- Lists of values
- Parameters

---

**Important:** See "[Before You Begin: Understand the Use of Parameter VOs with Oracle Enterprise Scheduler](#)" for information about how to define parameters in the BI Publisher data model when the report is submitted by the Oracle Enterprise Scheduler.

---

- Bursting definition

See the *Oracle Fusion Middleware Data Modeling Guide for Oracle Business Intelligence Publisher (Oracle Fusion Applications Edition)* for details on creating these components.

**6.** Add sample data to your data model. See "[Task: Generate Sample Data from the Report](#)" for the steps for adding sample data to a data model.

#### 8.2.4 Creating Custom Reports

Create a custom report when the reports delivered with your Oracle Fusion application do not provide the data you need; or, if you want to use a predefined data model but change other properties of the report.

##### **Task: Create the Data Model**

If you are using a predefined data model, skip this step.

To create a data model, see [Section 8.2.3.2, "Creating a New Data Model."](#)

**Task: Create the Report Definition in the Catalog and Choose the Data Model**

On the global header, click **New**, then click **Report**. Select the data model to use for the data source for this report.

**Task: Create and Add the Layout**

Follow the tasks described in the section "Creating Custom Layouts" beginning with "[Task: Edit or Create the Layout](#)".

**Task: Configure Report Properties**

You can configure a variety of properties to set specific formatting, caching, and processing options for your report. To access the **Properties** dialog, click **Properties** in the report editor. For information on report properties see "Configuring Report Properties" in the *Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher*.

**Task: (Conditional) Create an Oracle Enterprise Scheduler Job to Run the Custom Report**

If you will need to schedule this report from an Oracle Fusion application, you must create an Oracle Enterprise Scheduler job and job definition. This may also require creating a parameter VO. See [Section 8.2.6, "Tasks Required to Run Custom Reports with Oracle Enterprise Scheduler Service."](#)

**Task: (Conditional) Enable Access to the Report Through the Reports and Analytics Pane**

See [Section 8.2.8, "Making Reports Available to Users in the Reports and Analytics Pane."](#)

## 8.2.5 Adding Translations

Template translation is a feature of BI Publisher that enables the extraction of translatable strings from a single RTF-based template or a single BI Publisher layout template (.xpt file). Use this option when you need multiple translations of the final report document; for example, you need to generate invoices for both German and French customers.

For information on adding translations for your custom report layouts, see the chapter "Translating Individual Templates" in the *Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher*.

## 8.2.6 Tasks Required to Run Custom Reports with Oracle Enterprise Scheduler Service

If you created a new report, to run it using Oracle Enterprise Scheduler, you must create a new Oracle Enterprise Scheduler job definition. If you customized an existing report (for example, added a custom layout) for which an Oracle Enterprise Scheduler job definition was defined, you will need to create a new job definition to point to the custom report.

Creating a custom Oracle Enterprise Scheduler job definition is described in [Chapter 14, "Customizing and Extending Oracle Enterprise Scheduler Jobs."](#)

Information specific to creating a custom BI Publisher job is in the section: "Extending a Custom Oracle BI Publisher Oracle Enterprise Scheduler Job."

This section summarizes the tasks:

- [Creating a New Oracle Enterprise Scheduler Job Definition](#)

- [Customizing Parameters for Reports Submitted Through Oracle Enterprise Scheduler](#)

### **8.2.6.1 Creating a New Oracle Enterprise Scheduler Job Definition**

To create an Oracle Enterprise Scheduler Job Definition:

Follow the instructions for creating a job definition in the "["Extending Custom Oracle Enterprise Scheduler Jobs" on page 14-2](#). Note the following for BI Publisher jobs:

- **Job Type:** Select BIPJobType
- **ReportID:** Enter the path to the report in the BI Presentation catalog, starting with the folder beneath Shared Folders, for example: Financials/Payables/Payables InvoiceRegisterCustom.xdo

---

**Tip:** Ensure that you include the .xdo extension for the report object.

---

- **Default Output:** Select a default output format.
- **Bursting Job:** If the output from this job is to be burst, select this box. The BI Publisher report must have a bursting definition to use this option. When the report is executed, the output and delivery options are determined by the bursting definition. For information on setting up a bursting definition, see "Adding Bursting Definitions" in the *Oracle Fusion Middleware Data Modeling Guide for Oracle Business Intelligence Publisher (Oracle Fusion Applications Edition)*.
- Define the property parametersVO to point to the parameter VO you defined, if your custom job requires parameter input.

### **8.2.6.2 Customizing Parameters for Reports Submitted Through Oracle Enterprise Scheduler**

The parameter VO is a view object used by Oracle Enterprise Scheduler to collect user input for report parameters that the Oracle Enterprise Scheduler then sends to BI Publisher. The parameter VO defines the display of the parameters in the Oracle Enterprise Scheduler interface and performs validation of the input. Use JDeveloper to edit the parameter VO.

#### **Task: Create or Customize the Parameter View Object**

To customize a parameter VO, see the following information:

- [Chapter 11, "Customizing and Extending ADF Application Artifacts"](#) for information on how to customize view objects in Oracle Fusion Applications.
- "Defining SQL Queries Using View Objects" chapter in the *Oracle Fusion Middleware Fusion Developer's Guide for Oracle Application Development Framework* for the full description view objects and creating them in JDeveloper.

#### **Task: Align Parameter Order in the BI Publisher Data Model**

Ensure that the attributes defined for the parameters in the view object are in the same order as the parameters in the BI Publisher data model. See "["Before You Begin: Understand the Use of Parameter VOs with Oracle Enterprise Scheduler"](#) for more information.

**Task: Integrate the Parameter VO in the Oracle Enterprise Scheduler Job Definition**

Follow the instructions for creating a job definition in "[Extending Custom Oracle Enterprise Scheduler Jobs](#)" on page 14-2.

## 8.2.7 Securing Custom Reports and Related Components

When you create a custom report you may wish to create a duty role to enable only users that have been assigned the specific report duty role to run the report. If you have also created an Oracle Enterprise Scheduler job to run the report, your users must also be assigned execution permissions for the job. All the tasks in this section are required when you create a custom duty role.

If you choose to enable the custom report for an existing duty role, ensure that this role is assigned to the objects in the BI Presentation catalog and to the Oracle Enterprise Scheduler job definition. In this case, you need only perform the tasks: [Task: Configure Permissions in the BI Presentation Catalog](#) and [Task: Grant Permissions to the Oracle Enterprise Scheduler Job Definition](#).

**Task: Create the Custom Report Duty Role in the OBI Stripe**

To create the custom report duty role:

Only a system administrator can create a new role, and optionally include the role in an existing role hierarchy. For information about creating application roles, see the "Managing Security Artifacts" chapter in the *Oracle Fusion Middleware Oracle Authorization Policy Manager Administrator's Guide (Oracle Fusion Applications Edition)*

**Task: Configure Permissions in the BI Presentation Catalog**

Read permissions must be granted in the BI Presentation catalog to every object that is used in the report. This will always include at least two objects: the report and the data model. If your report also references a subtemplate or a style template, you must also grant read permissions on those objects. The report object requires additional grants to run, schedule, and view output.

If you create the custom report within an existing product folder, for example Payables/Invoices, the report will inherit permissions that are granted on all objects in the folder. You may wish to delete permissions from your custom report.

See "Managing Objects in the BI Presentation Catalog" in the *Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition (Oracle Fusion Applications Edition)* for more information about catalog permissions.

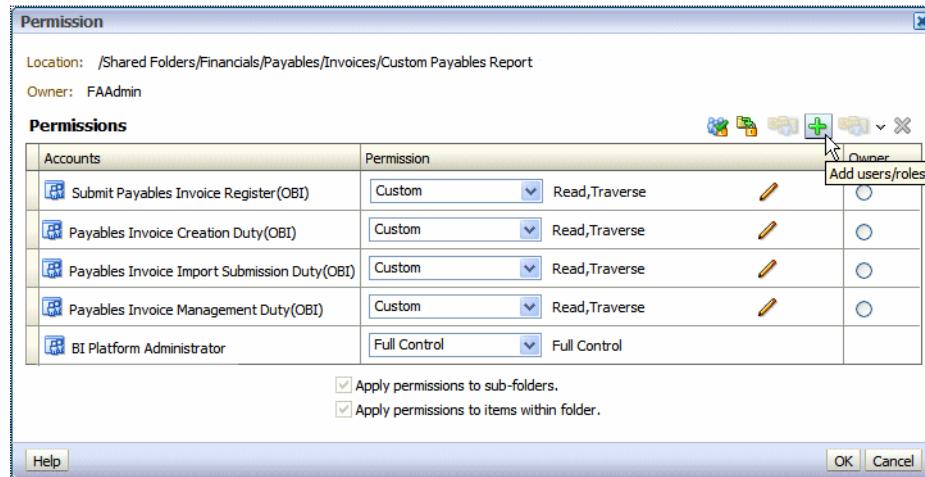
Configuring permissions in the BI Presentation catalog consists of the following subtasks:

- ["Grant the Role Permissions to the Report"](#)
- ["Grant the Role Permissions to the Data Model and Other Referenced Objects"](#)
- ["Delete Permissions"](#)

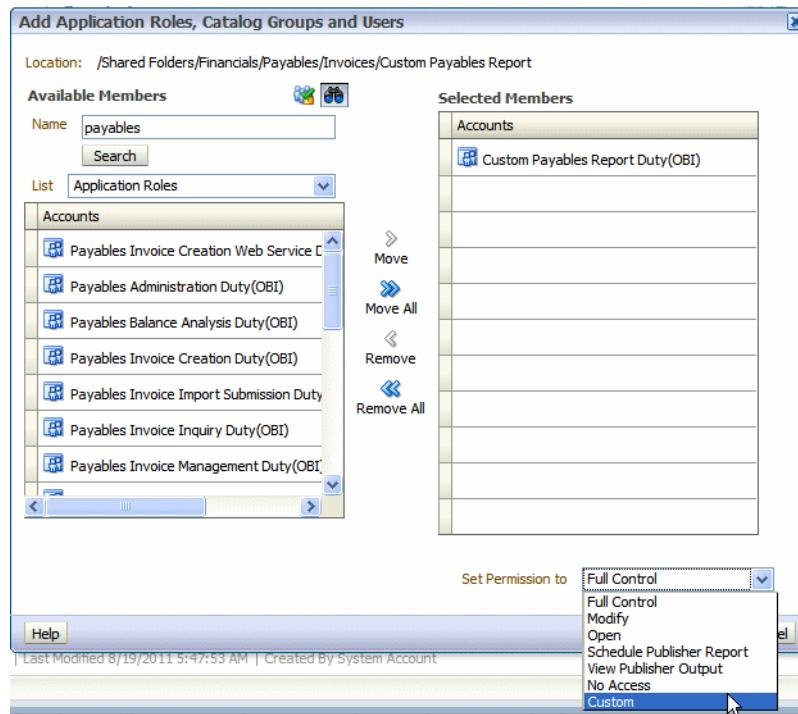
**Grant the Role Permissions to the Report**

To grant permissions in the catalog:

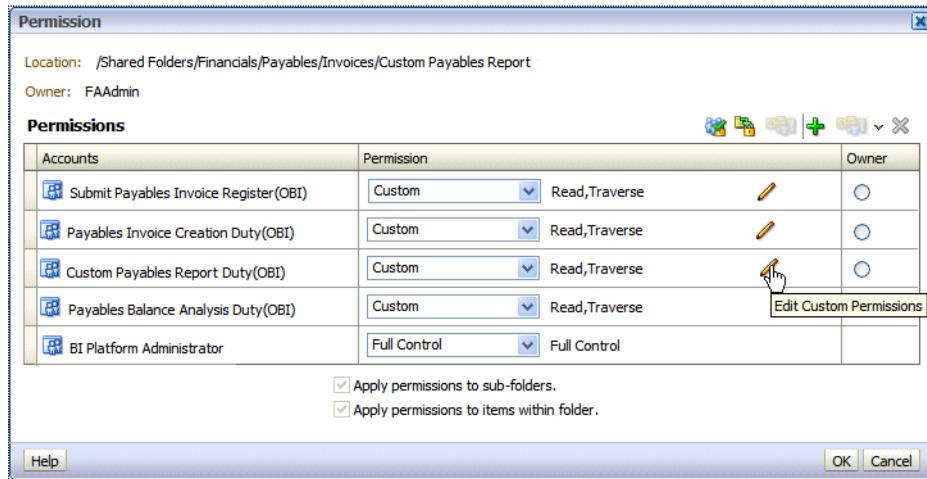
1. Navigate to the report in the catalog and click **More** and then click **Permissions**. The **Permissions** dialog launches and the inherited permissions are shown.
2. In the **Permissions** dialog, click **Add users/roles** as shown in the following figure:



3. In the **Add Application Roles, Catalog Groups and Users** dialog, search for your custom duty and use the shuttle buttons to move it to the **Selected Members** list. In the **Set Permission to** list, select **Custom**, as shown in the following figure, and then click OK.

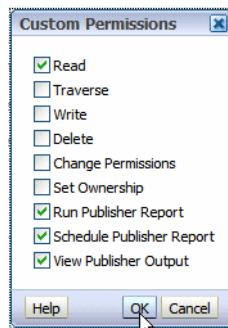


4. In the **Permissions** dialog, locate the duty you added and click the **Edit** button as shown in the following figure:



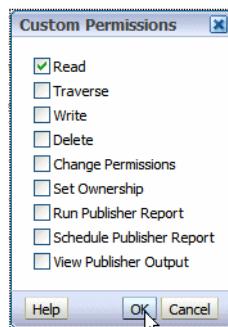
- In the **Custom Permissions** dialog, select the permissions to enable. Typically, you will enable the following for a BI Publisher report:
  - Read - gives authority to access, but not modify, the report
  - Run Publisher Report - gives authority to read, traverse the folder that contains the report, and run the report.
  - Schedule Publisher Report - gives authority to read, traverse the folder that contains the report, and schedule the report
  - View Publisher Output - enables the user to view the report output generated by the scheduler

The **Custom Permissions** dialog is shown in the following figure:



### Grant the Role Permissions to the Data Model and Other Referenced Objects

- Navigate to the data model in the catalog and click **More** and then click **Permissions**. The **Permissions** dialog launches and the inherited permissions are shown.
- Follow the instructions in "Grant the Role Permissions to the Report" but in the **Custom Permissions** dialog, enable only the **Read** permission, as shown in the following figure:

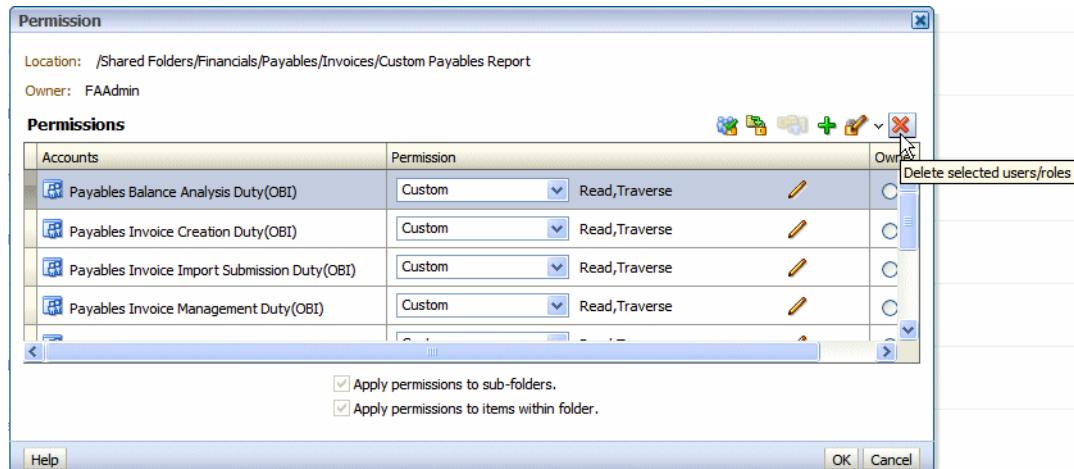


3. Repeat this procedure for any other referenced objects (subtemplates or style templates).

### Delete Permissions

If the custom report inherited permissions that you want to remove from the report, you can delete permissions as follows:

1. Navigate to the object in the catalog and click **More** and then click **Permissions**. The **Permissions** dialog launches and the inherited permissions are shown.
2. Select the permission to delete and click the delete toolbar button, as shown in the following figure:



### Task: Grant Permissions to the Oracle Enterprise Scheduler Job Definition

If this report is scheduled through the Oracle Enterprise Scheduler, execution permissions must also be granted to enable users belonging to submit the job. See [Task: Grant Relevant Permissions](#) in Chapter 14, "Customizing and Extending Oracle Enterprise Scheduler Jobs."

## 8.2.8 Making Reports Available to Users in the Reports and Analytics Pane

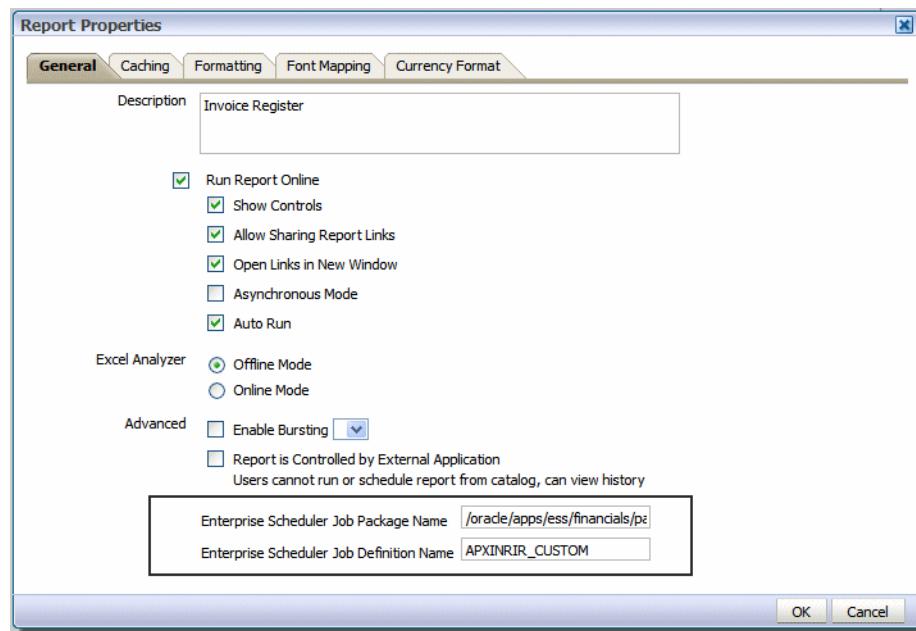
To make a report available to users through the Reports and Analytics pane, map the report to the work areas of the user roles that will need access. For information on mapping reports to work areas, see "Define Application Toolkit Configuration" in the *Oracle Fusion Applications Common Implementation Guide*.

To enable scheduling through the Reports and Analytics pane, configure the report properties:

1. Navigate to the report in the Business Intelligence catalog and click **Edit**.

2. In the report editor, click **Properties**.
  3. On the **Properties** dialog enter the following fields:
    - Enterprise Scheduler Job Package Name  
Enter the Path for the Job Definition. For example:  
/oracle/apps/ess/financials/payables/invoices/transactions/Jobs
    - Enterprise Scheduler Job Definition Name  
Enter the Name for the Job Definition. For example: APXINRIR
- The **Report Properties** dialog is shown in [Figure 8–23](#):

**Figure 8–23 Report Properties to Enable Scheduling Through the Reporting Pane**



## 8.3 Customizing Analytics

This section describes how to use Oracle Business Intelligence Enterprise Edition to customize and extend analytics for Oracle Fusion Applications.

### 8.3.1 About Customizing Analytics

Analytics are analyses and dashboards built with Oracle Business Intelligence Presentation Services, based on objects in the Oracle BI repository. Analyses are queries based on real-time, transactional or operational data that provide answers to business questions. Dashboards provide personalized views of corporate and external information. A dashboard consists of one or more pages that contain content, such as analyses, links to Web sites, BI Publisher reports, and so on.

You can customize analyses using the Oracle BI Composer interface from within Oracle Fusion Applications. You can customize dashboards using Oracle Business Intelligence Enterprise Edition.

You can also customize objects in the Oracle BI repository (RPD) using the Administration Tool in either online or offline mode. Use online mode only for small changes that do not require running consistency checks. Running consistency checks

against the full online repository can take a long time. Instead, make more complex changes that require consistency checks in offline mode against a project extract of the repository.

**Table 8–4** provides guidelines for when to perform online and offline edits. See *Oracle Fusion Middleware Metadata Repository Builder's Guide for Oracle Business Intelligence Enterprise Edition (Oracle Fusion Applications Edition)* for full information about how to use the Administration Tool to edit RPD files.

**Table 8–4 Guidelines for Online and Offline RPD Edits**

Mode	Use This Mode For:	Example Use Cases	Example Operations Information
Online	<ul style="list-style-type: none"> <li>▪ Changes that do not require running a consistency check</li> <li>▪ Small changes that are required to fix things in a running system</li> <li>▪ Changes that need to be deployed quickly</li> </ul>	<ul style="list-style-type: none"> <li>▪ Renaming Presentation Layer metadata</li> <li>▪ Reorganizing Presentation Layer metadata</li> </ul>	<ol style="list-style-type: none"> <li>1. Connect to the RPD in online mode.</li> <li>2. Check out, modify, then check in the appropriate objects.</li> <li>3. In a clustered system, restart all Oracle BI Servers except for the master server to propagate the changes.</li> </ol> <p>You can use the Cluster Manager in the Administration Tool to identify the master Oracle BI Server.</p>
Offline	<ul style="list-style-type: none"> <li>▪ Full-scale development or customization activities that require running consistency checks multiple times and iterating</li> </ul>	<ul style="list-style-type: none"> <li>▪ Configuring Descriptive Flexfields and Key Flexfields for Oracle Business Intelligence</li> <li>▪ Customizing existing fact or dimension tables</li> <li>▪ Adding new fact or dimension tables</li> </ul>	<ol style="list-style-type: none"> <li>1. Copy the RPD from the production computer to the Windows development computer.</li> <li>2. Open the RPD in offline mode and make the appropriate changes.</li> <li>3. Upload the repository using Fusion Applications Control and restart all Oracle Business Intelligence system components.</li> </ol>

### 8.3.1.1 What You Can Customize in Analytics

You can customize analyses and dashboards, as well as objects in the Oracle BI repository (RPD).

Customizations to analyses and dashboards result in changes to the Oracle BI Presentation Catalog. Be aware that some patches include updates to the Oracle BI Presentation Catalog. All new objects are preserved during the patch process; in addition, changes to existing objects are preserved when the patch does not include a new version of that object.

If you change an existing presentation catalog object and subsequent patches do include a new version of the object, the patch process detects and logs conflicts, and patching will stop. The catalog administrator must resolve any conflicts manually using Catalog Manager and then rerun the patch.

In the Oracle BI repository, you can create new repository objects such as physical columns, logical table sources, logical columns, and presentation columns. Be aware that some patches include updates to the Oracle BI repository. New objects are

preserved during the patch process; in addition, changes to existing objects are preserved when the patch does not include a new version of that object.

If you change an existing object and subsequent patches do include a new version of the object, the Merge Wizard in the Administration Tool provides a method to merge the changes. For most typical customizations, the merge process is straightforward. The exception is when presentation columns have been moved across presentation tables; in this situation, it is important to plan ahead and track the changes carefully to ensure your changes are preserved during the merge.

See "Oracle BI Applications Patching" in *Oracle Fusion Middleware Reference Guide for Oracle Business Intelligence Applications* for more information about patching the Oracle BI Presentation Catalog and Oracle BI repository.

### 8.3.1.2 Before You Begin Customizing Analytics

Before you customize analytics, ensure you have proper permissions for editing and creating Oracle Business Intelligence Presentation Catalog objects and understand how to set permissions in the catalog. For more information about setting permissions in the catalog, see "Managing Objects in the Oracle BI Presentation Catalog" in *Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition (Oracle Fusion Applications Edition)*.

In addition, you must have the BIAuthor role to customize analytics (either explicitly granted, or inherited from another role).

Follow these guidelines when customizing analytics:

- When customizing referenced objects (such as embedded dashboards or targets of navigation actions), consider customizing them in place using "Save." Note that objects for Oracle Transactional Business Intelligence and Oracle Business Intelligence Applications provide conflict detection so that your customizations will not be overwritten during future patches.
- When customizing objects that are not referenced, consider using "Save As." You have the following choices when using Save As:
  - Existing folder structure (recommended)

Saving to the existing folder structure extends the organization of your existing reports to include the custom reports. To use this approach, make sure that an Oracle BI administrator (a user with the BIAdmin role) grants Write permissions to the BIAuthor role for the given folders. Note that the reports inherit folder permissions that control which roles have Read and Write access.

- New folders under Shared Folders

To use this approach, an Oracle BI administrator must create these folders and then grant Write permission to the BIAuthor role, as well as Read permission to other application roles as needed.

- My Folders

Because nobody else can access My Folders, you do not typically save analytics to that location except for testing purposes.

## 8.3.2 Customizing Analytics

You can customize analytics from the Reports and Analytics pane in Oracle Fusion Applications.

### Task: Customizing Analytics

To customize analytics, go to the Reports and Analytics pane and locate to the object you want to customize. For analyses, click the object and then select **Edit** to use the Oracle BI Composer to edit the object. For dashboards, click the object and then select **More** to go to the Catalog page in Oracle Business Intelligence Enterprise Edition.

For information on customizing analyses using Oracle BI Composer, see "Using BI Composer to Work with Analyses" in *Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition (Oracle Fusion Applications Edition)*.

For information on customizing dashboards in the Catalog page, see "Building and Using Dashboards" in *Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition (Oracle Fusion Applications Edition)*.

### 8.3.3 Customizing the Oracle BI Repository (RPD)

You can customize and extend the Oracle BI repository (RPD file).

#### Task: Modifying Existing Fact or Dimension Tables

In some cases, you might want to modify existing fact or dimension tables in the Oracle BI repository. For example, say you want to deploy Fusion Projects, but use the PeopleSoft Procurement application as a source. In this situation, you would set up a custom table in Fusion Applications that populates Commitments data from PeopleSoft. Then, you would need to change the Commitments fact table in the Oracle BI repository (RPD file) to point to the new custom table.

To accomplish the task described in this example:

1. Define the custom VO for the custom table. You must follow the VO guidelines for Oracle Transactional Business Intelligence. See "Designing and Securing View Objects for Oracle Business Intelligence Applications" in *Oracle Fusion Applications Developer's Guide* for more information.
2. Use the Import Metadata Wizard in the Oracle BI Administration Tool to import the new VO into the Physical layer of the RPD under the appropriate database object. Then, join the new VO to the existing dimension VOs. You must connect as the FUSION\_APPS\_BI\_APPID user in the Select Data Source screen of the Import Metadata Wizard.

See "Importing Metadata from ADF Business Component Data Sources" and "Working with Physical Foreign Keys and Joins" in *Oracle Fusion Middleware Metadata Repository Builder's Guide for Oracle Business Intelligence Enterprise Edition (Oracle Fusion Applications Edition)* for more information.

3. Create a new logical table source under the existing Commitment logical fact table, and map all metrics to the physical columns from the new VO. Then, deactivate the existing Commitments logical table source.

See "Managing Logical Table Sources (Mappings)" in *Oracle Fusion Middleware Metadata Repository Builder's Guide for Oracle Business Intelligence Enterprise Edition (Oracle Fusion Applications Edition)* for more information.

Using this approach, all Presentation layer metadata, analyses, and dashboards will continue to work with data coming from the new physical columns.

#### Task: Adding New Fact or Dimension Tables

In some cases, you might want to add new fact or dimension tables to your Oracle BI repository. Possible sources include custom tables in Oracle Fusion Applications, additional tables in the data warehouse, or new physical data sources.

To add new fact or dimension tables to your RPD:

1. For Oracle Fusion Applications sources, ensure that the custom VOs follow the VO guidelines for Oracle Transactional Business Intelligence. See "Designing and Securing View Objects for Oracle Business Intelligence Applications" in *Oracle Fusion Applications Developer's Guide* for more information.
2. Use the Import Metadata Wizard in the Oracle BI Administration Tool to import the new VO (for Oracle Fusion Applications) or physical table (for warehouse or other physical sources) into the Physical layer of the RPD. For non-warehouse physical sources, you must create a new connection pool as part of the import process. You must connect as the FUSION\_APPS\_BI\_APPID user in the Select Data Source screen of the Import Metadata Wizard.

For more information, see the following resources in *Oracle Fusion Middleware Metadata Repository Builder's Guide for Oracle Business Intelligence Enterprise Edition (Oracle Fusion Applications Edition)*:

- "Importing Metadata from ADF Business Component Data Sources" for Oracle Fusion Applications sources
  - "Importing Metadata and Working with Data Sources" for other physical sources
3. Define new logical dimensions and measures to extend the semantic model, and add physical and logical joins.

See "Working with Logical Tables, Joins, and Columns" and "Working with Physical Foreign Keys and Joins" in *Oracle Fusion Middleware Metadata Repository Builder's Guide for Oracle Business Intelligence Enterprise Edition (Oracle Fusion Applications Edition)* for more information.

4. Add corresponding Presentation layer metadata.

See "Creating and Maintaining the Presentation Layer" in *Oracle Fusion Middleware Metadata Repository Builder's Guide for Oracle Business Intelligence Enterprise Edition (Oracle Fusion Applications Edition)* for more information.

### **Task: Changing How Metadata Is Displayed in Answers Reports**

In some cases, you might want to change how the names of facts and dimensions in the Presentation layer appear in Answers reports, to comply with naming standards or for other reasons. [Table 8–5](#) summarizes considerations for different use cases.

**Table 8–5 Use Cases for Changing How Metadata Is Displayed**

Use Case	For More Information
<p>For warehouse sources, display names are typically externalized into a database table. To customize the names, you can change them in the externalized tables with no impact to the metadata itself.</p> <p>Note that for situations where display names are externalized into a database table, changing the names of Presentation layer objects in the RPD has no impact on the names displayed in Answers reports.</p>	<p>See "Localizing Metadata Names in the Repository" in <i>Oracle Fusion Middleware System Administrator's Guide for Oracle Business Intelligence Enterprise Edition</i> for more information about externalizing display names.</p>

**Table 8–5 (Cont.) Use Cases for Changing How Metadata Is Displayed**

Use Case	For More Information
<p>For Oracle Transactional Business Intelligence sources, display names are typically customized using UI hints (labels and tooltips) within Oracle Fusion Applications. Changing the UI hint name does not impact metadata.</p> <p>Note that for situations where display names are customized using UI hints, changing the names of Presentation layer objects in the RPD has no impact on the names displayed in Answers reports.</p>	<p>See "Propagating Labels and Tooltips from ADF Business Component Data Sources" in <i>Oracle Fusion Middleware Metadata Repository Builder's Guide for Oracle Business Intelligence Enterprise Edition (Oracle Fusion Applications Edition)</i> for more information about how UI hints are propagated in the RPD.</p>
<p>For situations where Presentation layer names are not externalized or tied to UI hints, display names must be modified directly in the RPD. Existing reports will continue to work because the old names are stored as aliases.</p>	<p>See "Renaming Presentation Columns to User-Friendly Names" in <i>Oracle Fusion Middleware Metadata Repository Builder's Guide for Oracle Business Intelligence Enterprise Edition (Oracle Fusion Applications Edition)</i> for more information.</p>

### Task: Reorganizing Presentation Layer Metadata

Note the following about reorganizing Presentation layer metadata in the RPD:

- Reordering presentation columns within a presentation table will not cause existing reports to break. When subsequent patches are applied, the new custom order is preserved when the patch does not include changes to the column order for that table.
- Moving presentation columns across different presentation tables can cause existing reports to break and is not recommended. If you do move presentation columns across tables, it is important to plan ahead and track the changes carefully.

### Task: Configuring Descriptive Flexfields and Key Flexfields for Oracle Business Intelligence

You can use the Import Metadata Wizard in the Administration Tool to incrementally import flexfield changes to the Physical layer of the Oracle BI repository (RPD).

**Tip:** See [Chapter 5, "Using Flexfields for Custom Attributes"](#) for information about changing flexfields. In particular, see "[Task: Incorporate Custom Attributes into the Business Intelligence Structure](#)" for information about enabling flexfields for BI.

In addition, you can use the Map to Logical Model screen of the Import Metadata Wizard to automatically propagate the flexfield changes to the Business Model and Mapping layer.

Finally, for Oracle BI Applications customers, you can configure and enable the BI Extender functionality to propagate flexfield changes to the data warehouse.

See the following resources in *Oracle Fusion Middleware Metadata Repository Builder's Guide for Oracle Business Intelligence Enterprise Edition (Oracle Fusion Applications Edition)* for more information about these topics:

- "[Using Incremental Import to Propagate Flex Object Changes](#)"
- "[Automatically Mapping Flex Object Changes to the Logical Model](#)"

- "Using the BI Extender to Propagate Flex Object Changes"

**Task: Moving RPD Changes to Production Systems**

Typically, data source connection pool settings are different in production repositories. You can use the Oracle BI Server XML API to programmatically update these settings in the repository when moving changes to production systems. See "Moving from Test to Production Environments" in *Oracle Fusion Middleware Integrator's Guide for Oracle Business Intelligence Enterprise Edition* for more information.

# Customizing Security for Custom Business Objects

This chapter describes how to use CRM Application Composer to define and edit role-based security policies on custom business objects.

Currently, customizing security is only supported for certain Oracle Fusion CRM applications, limited to the Sales, Marketing, Customer Center, Trading Community Architecture, or Order Capture applications.

This chapter includes the following sections:

- [Section 9.1, "About Defining Security Policies"](#)
- [Section 9.2, "Defining Security Policies for Custom Business Objects"](#)
- [Section 9.3, "Enabling End User Instance-Level Security Customization"](#)
- [Section 9.4, "Preventing Corrupted Security Policies in CRM Application Composer"](#)

## 9.1 About Defining Security Policies

Security for Oracle Fusion Applications is configured to protect the data and business functions of the enterprise from unintended access. By default, new business objects and the web pages that display them are inaccessible to any user other than the user of CRM Application Composer. This means that when you create a security policy in CRM Application Composer, you specifically *grant* access to resources that would otherwise be protected. Additionally, security policies defined in CRM Application Composer are enforced on *all* the data records of the business object. Controlling access to individual data records is not supported for custom objects.

To enable access to the data records, you can use CRM Application Composer to create security policies for new business objects that they add to the following CRM applications:

- Sales (Partner Center)
- Marketing
- Customer Center
- Trading Community Architecture
- Order Capture

---

**Note:** For information about how to define security policies for custom business objects in other Oracle Fusion applications, see [Chapter 15, "Customizing Security for ADF Application Artifacts."](#)

---

In Oracle Fusion Applications, the business object defines the available operations that may be performed over a particular set of data. The business object also encapsulates the data as business object instances, corresponding to data records from a database table. Typical operations are business functions like viewing, editing, or creating an instance of the business object. A security policy essentially needs to specify "who can perform what operations on what specific data."

Security policies in Oracle Fusion Applications provide *role-based access control* to the data records encapsulated by the business object, as well as the application artifacts, like web pages that interact with those data records. Role-based security ensures that the person creating the security policy does not require information about the individuals comprised by the enterprise at any given time. Rather, a security policy is always associated with a predefined role that end users are anticipated to fill when interacting with Oracle Fusion Applications.

For example, in a sales organization, duties such as `Manage_Accounts` and `Manage_Invoices` exist for roles, such as `Sales_Manager` or `Sales_Associate`. A security policy might give end users who belong to the `Sales_Associate` role the ability to view and edit the data records exposed by a particular business object, such as a customer invoice, but not to delete the records. Whereas, another security policy could grant end users who belong to the `Sales_Manager` role, the right to view, edit, and delete the same data records.

A security administrator for the enterprise completes the security configuration task by provisioning end users of the enterprise with one or more roles, based on the variety of duties the end user is expected to perform. The security policies defined for that role, in turn, confer to its member end users specific access rights, or privileges.

---

**Note:** Security-related configuration tasks such as configuring the enterprise identity store, configuring roles, and provisioning end user identities are not supported in CRM Application Composer. For details about security configuration, see the "Securing Oracle Fusion Applications" chapter in the *Oracle Fusion Applications Administrator's Guide*.

---

In summary, a security policy for Oracle Fusion Applications considers the duties end users perform and then grants a role specific rights to:

- Access the page that supports the duty
- Access the specific data records, or instances of the business object, required to complete the duty
- Perform only those operations on that data required by the duty.

### 9.1.1 About the Implementation of Security Policies in CRM Application Composer

Although CRM Application Composer does not implement the security policy directly on the business object, the user interface focuses on business objects as a convenient way to represent and manage the actual security policies of the enterprise. Specifically, CRM Application Composer security policy screens simplify the task of choosing a

business object and then creating a complete security policy to grant the level of access needed by any role in Oracle Fusion Applications.

A complete security policy is one that controls access to the selected business object's operations, its instances, as well as the web pages that display the actual data records exposed by the business object. In the background, when you create a security policy for a custom business object and a role, CRM Application Composer interacts with the Oracle Fusion Applications security repositories to create or update the specific security artifacts that define the policy.

Specifically, the artifacts created in the Oracle Fusion security repositories by CRM Application Composer correspond to Oracle Fusion Data Security policies and Oracle Platform Security Service (OPSS) function security policies. A security policy that defines the level of access to the data records of the business object is known as a *data security policy*. A security policy that defines the level of access to the application resources that display the object is known as a *function security policy*. To completely specify access, both types of security policies must exist for the role.

While both types of security policies are conceptually similar, the repository for storing the security artifacts, as well as the representation of the artifacts, differ. CRM Application Composer defines the data security policy in Oracle Fusion Data Security database tables and defines the OPSS function security policy as hierarchically organized objects in an LDAP directory service.

For the user of CRM Application Composer, the distinctions of the type of security policy and the specific repository used to store them are not relevant. CRM Application Composer security policy screens do not label policies as data policies and function policies. In CRM Application Composer, the security policy screens hide these distinctions and instead allow you to focus on the business object. The security policy screen lets you view the business objects by name and modify the privileges granted to the various Oracle Fusion Applications roles to access the data records exposed by the business object and to access the web page created to display those records.

To understand the implementation details of data security and function security, you can read about the tools developers use to interact directly with the security repositories, as described in [Chapter 15, "Customizing Security for ADF Application Artifacts."](#)

### 9.1.2 What You Can Do With Security Policies at Runtime

After you create a custom business object and then create the web page to display the data records of the business object in CRM Application Composer, these application artifacts will be secured in Oracle Fusion Applications by default. This means end users will be denied access until you grant them access through a role-based security policy that you define.

To enable access, you can use CRM Application Composer to create role-based security policies for new business objects that are added to the following CRM applications:

- Sales (Partner Center)
- Marketing
- Customer Center
- Trading Community Architecture
- Order Capture

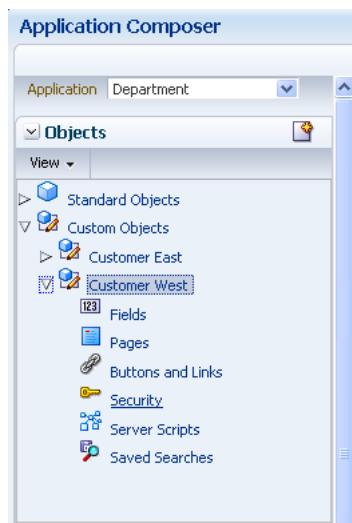
---

**Note:** For information about how to define security policies for custom business objects in other Oracle Fusion applications, see [Chapter 15, "Customizing Security for ADF Application Artifacts."](#)

---

**Figure 9–1** shows the Application Navigator in CRM Application Composer with the **Custom Object** list expanded to display the **Security** option for a custom business object. The **Security** option is displayed in the Application Navigator only for custom business objects. Once selected, it opens the object-centric security policy screen and displays the policies for the expanded business object (as shown in [Figure 9–1](#)).

**Figure 9–1 Navigator Displays Security Customization Option for Custom Objects in CRM Application Composer**




---

**Note:** The term *custom object* is used in CRM Application Composer to distinguish business objects that you create from standard objects that are part of the Oracle Fusion Applications security reference implementation. Security policies for standard objects are not exposed in CRM Application Composer. For more information about configuring security for the reference implementation, see [Section 15.2, "About Extending the Oracle Fusion Security Reference Implementation."](#)

---

Because security policies provide role-based access, in CRM Application Composer a security policy specifies a role name, a custom business object name, and one or more privileges that specify the level of access granted to the role. As described in [Section 9.1.1, "About the Implementation of Security Policies in CRM Application Composer,"](#) when you use the security policy screens in CRM Application Composer, you will not need to create the underlying security artifacts; the tool will create those for you in the appropriate Oracle Fusion security repository.

The security screens in CRM Application Composer let you grant and revoke access privileges to roles in one of two formats.

**Figure 9–2** shows the screen that lets you display a single *custom object* and view all the roles and the level of access that each one defines for that custom business object. In this example, the object-centric security screen displays the custom business object

**CustomerWest** and shows a default security policy defined on the **CRM Application Administrator Duty** role (note the default role to use for testing security can be configured for the Sales, Marketing, Customer Center, Trading Community Architecture, and Order Capture applications). CRM Application Composer creates this security policy by default so that you can view and customize the custom object in CRM Application Composer. In this screen, no other policies have been defined.

**Figure 9–2 Object-Centric Security Policy Screen: Viewing and Modifying All Security Policies for a Given Custom Business Object**

The screenshot shows a 'Define Policies' dialog box titled 'CustomerWest'. At the top right are 'Save', 'Save and Close', and 'Cancel' buttons. Below the title is a 'Roles' section with a detailed description. A grid table follows, with columns for 'Role' and then eight permission types: Create, View, Update, Delete, View All, Update All, and Grant Access. The rows list various roles such as 'Data Steward Manager Duty', 'Partner Portal User Duty', etc. Most roles have 'Create' checked, while 'View' and 'Update' are often checked. 'Delete', 'View All', 'Update All', and 'Grant Access' are typically unchecked or grayed out.

Role	Create	View	Update	Delete	View All	Update All	Grant Access
Data Steward Manager Duty	<input type="checkbox"/>	<input type="checkbox"/>					
Partner Portal User Duty	<input type="checkbox"/>	<input type="checkbox"/>					
Sales Analyst Duty	<input type="checkbox"/>	<input type="checkbox"/>					
CRM Application Administrator Duty	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Sales Catalog Administrator Duty	<input type="checkbox"/>	<input type="checkbox"/>					
Master Data Management Application Administrator	<input type="checkbox"/>	<input type="checkbox"/>					
Sales Manager Duty	<input type="checkbox"/>	<input type="checkbox"/>					
Sales VP Duty	<input type="checkbox"/>	<input type="checkbox"/>					
Customer Data Steward Duty	<input type="checkbox"/>	<input type="checkbox"/>					
Sales Representative Duty	<input type="checkbox"/>	<input type="checkbox"/>					

Figure 9–3 shows the alternative screen you can open to display a single *role* and view the level of access it grants to *all* the custom objects in the Sales, Marketing, Customer Center, Trading Community Architecture, or Order Capture applications. In this example, the role-centric security screen displays the **Sales Manager Duty** role with access granted to the **CustomerEast** business object.

**Figure 9–3 Role-Centric Security Policy Screen: Business Viewing and Modifying All Security Policies for a Given Role**

The screenshot shows a 'Define Policies' dialog box titled 'Sales Manager Duty'. At the top right are 'Save', 'Save and Close', and 'Cancel' buttons. Below the title is an 'Objects' section with a detailed description. A grid table follows, with columns for 'Object' and then eight permission types: View, Update, Create, and Delete, each with sub-columns for 'Access' and 'Related Roles'. The rows list objects like 'CustomerEast\_c' and 'CustomerWest\_c'. For 'CustomerEast\_c', 'View', 'Update', and 'Create' are checked under 'Access', while 'Delete' is checked under 'Related Roles'. Other objects like 'CustomerWest\_c' show different patterns of checked boxes.

Object	View		Update		Create		Delete				
	Access	Related Roles	View All	Update All	Grant Access						
CustomerEast_c	<input checked="" type="checkbox"/>	<input type="checkbox"/>									
CustomerWest_c	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The selection choices presented by the columns of both security policies screens (the object-centric screen and the role-centric screen) have the same meaning:

- The first four columns **View**, **Update**, **Create**, and **Delete** correspond to the privileges that confer rights to the web page that you create to display the data records of the custom business object.

The column selections define a function security policy in the LDAP security repository and determine whether the end user may view the web page, and then, assuming the page is displayed, whether the buttons that enable operations to edit a data record, create a new data record, or delete a data record will themselves appear enabled or disabled (grayed out) in the page.

At runtime, in the Oracle Fusion application, the end user may have the right to view the data records displayed by the web page, but unless their role also confers the right for example to edit the page, the user interface displays the page with the Edit button disabled to prevent this operation. Until **View**, **Update**, **Create**, and **Delete** columns are selected for a role, no function security policy exists in the LDAP security repository and the custom business object's web page remain protected by default, thus preventing all end users provisioned with that role from accessing the page and, consequently, also the data.

- The next two columns, **ViewAll** and **UpdateAll**, confer rights to view and manipulate the data records of the custom business object in the web page.

The column selections define a data security policy in the Oracle Fusion Data Security security repository and determine whether the end user may view the data records and, assuming the records are displayed in the web page, whether the end user has the rights to edit or delete the data records exposed by the custom business object. When you select **UpdateAll**, as a side-effect, CRM Application Composer automatically enables the corresponding function security privileges to give the end user the right to select the Edit buttons in the web page. Until **ViewAll** or **UpdateAll** columns are selected for a role, no data security policy exists in the repository and the data records remain protected by default, thus preventing all end users provisioned with that role from accessing the data.

- The last column, **Grant All**, enables a runtime security configuration feature that gives end users the ability to share their security entitlements with another end user.

When you enable "sharing" of entitlements for a specific custom business object, you allow one user to confer their privileges to another end user. The **Grant All** option enables the feature at the level of the business object so it will be effective in any page that displays the data records of the custom business object.

Figure 9–4 shows an alternative way to enable the entitlement sharing feature. When you use the page creation screen that you display for the custom business object, the option labeled **Allow Access Grant** lets you to enable the feature for the custom business object at the level of a single page.

**Figure 9–4 Create Work Area Flow: Enabling Entitlement Sharing**



When you use CRM Application Composer, you can optionally elect to do your work in a sandbox, and once you publish your sandbox, all business objects, pages, and the security policies you define become part of the running application. When you are ready to edit security policies, you can initiate the security sandbox setup operation. This setup operation will duplicate the schema for Oracle Fusion Data Security tables and is necessarily a lengthy one that must be allowed to complete before customization can begin. After you complete the customizations, published security

policies will be merged into the Oracle Fusion security policy repository as part of the native application and they will overwrite any previous customizations.

---

**Note:** Because inconsistencies can result when multiple users edit the security policies associated with the same object in different sandboxes, users should coordinate so they avoid customizing the same object concurrently. For more information about runtime customization and the sandbox, see [Chapter 2.2, "Using the Sandbox Manager."](#)

---

In summary, using CRM Application Composer, you can perform these tasks to define security policies for a custom business object:

- Grant and revoke access privileges made to specific roles (such as Sales Manager or Sale Representative). For details, see [Section 9.2, "Defining Security Policies for Custom Business Objects."](#)
- Enable end users to elevate the privileges of other end users by conferring their own rights to view, edit, or delete individual data records. For details, see [Section 9.3, "Enabling End User Instance-Level Security Customization."](#)

### 9.1.3 What You Cannot Do With Security Policies at Runtime

CRM Application Composer does not expose the underlying implementation details of the actual security policies created in the Oracle Fusion security repositories. Other tools in the Oracle Fusion Applications environment provide the enterprise security administrator and other appropriately authorized end users with complete control over the creation and viewing of those security artifacts.

Because CRM Application Composer provides an abstracted view of the security policy implementation, it also limits your ability to edit security policies. For example, a developer may need to control access to specific records of the custom business object that they implement, and they may use other tools to interact directly with the security repository to make this type of customization. Whereas, in CRM Application Composer, when you grant access privileges to a given role for a custom business object, CRM Application Composer creates a global instance set that specifies all data records of the business object. Therefore, no capability exists currently in CRM Application Composer to stripe individual data records with specific access privileges.

While you can create role-based security policies using CRM Application Composer, the following are more advanced use cases for which you will need to use development and administration tools:

- Create custom roles or modify the role inheritance hierarchy provisioned by Oracle Fusion Applications. In those cases where you will need to use a custom role, consult a system administrator. Only a system administrator may create a new role, and optionally include the role in an existing role hierarchy. For information about creating application roles, see the "Managing Security Artifacts" chapter in the *Oracle Fusion Middleware Oracle Authorization Policy Manager Administrator's Guide (Oracle Fusion Applications Edition)*.
- Define or edit a security policy contained in an application that is not Sales, Marketing, Customer Center, Trading Community Architecture, or Order Capture. In those cases, you will need to use other tools instead of CRM Application Composer to define your security policies. For more information, see [Chapter 15, "Customizing Security for ADF Application Artifacts."](#)

- Define or edit a data security policy for the standard business objects defined by any Fusion application. CRM Application Composer supports defining security for custom business objects only. Only an authorized IT security manager can manage the Oracle Fusion security reference implementation where they use other tools to edit policies for standard objects. For more information, see [Chapter 15.2, "About Extending the Oracle Fusion Security Reference Implementation."](#)
- Define data security policies on individual business object instances or groups of instances. Security policies that you define in CRM Application Composer are enforced on all the data records of the business object (referred to as a *global instance set*). Controlling access to individual data records is not supported on custom objects. Only customization developers and IT security managers can manage data security policies. For more information, see [Section 15.3.4, "Scenarios Related to Extending and Securing Data Model Components."](#)
- Enforce column-level security. Security policies that you define in CRM Application Composer are enforced on the data records (or rows) of the business object. Controlling access to columns of data requires using JDeveloper to create a customization workspace for the application. For more information, see [Chapter 15.3.4, "Scenarios Related to Extending and Securing Data Model Components."](#)
- Define function security policies on individual application artifacts. Security policies that you define in CRM Application Composer will automatically be enforced on the application resources that reference the custom business object based on the View, Edit, Update, and Create privileges you select. Enforcing security on specific application resources, such as a customized task flow and its web pages or components in a web page, requires using JDeveloper to create a customization workspace for the application. For more information, see [Chapter 15.3.5, "Scenarios Related to Extending and Securing User Interface Artifacts."](#)

#### 9.1.4 Before You Begin Customizing Security

Before you begin customizing security in CRM Application Composer, you should be familiar with the Oracle Fusion application architecture that enables customization, as described in [Chapter 1, "Customizing and Extending Oracle Fusion Applications."](#) You should also understand the typical workflows for working with customizations, as described in [Chapter 2, "Understanding the Customization Development Lifecycle."](#)

You will need to do the following before you can begin customizing security:

- Obtain the privileges needed to define security policies in CRM Application Composer.

If you will be defining or editing security policies in Oracle Fusion Applications, you will need the correct privileges. When you have the correct privileges, CRM Application Composer will give you access to the security customization user interface. Please contact your security administrator for details.

- Optionally, set up a sandbox.

CRM Application Composer can use sandboxes to manage your customizations. For more information, see [Section 2.2, "Using the Sandbox Manager."](#)

**Note:** Because setting up the security sandbox requires duplicating the schema for Oracle Fusion Data Security tables, this will always be a lengthy operation in CRM Application Composer. Be sure to allow sufficient time for the process to complete and do not terminate it early. You may want to defer customizing security and

- enabling the security sandbox until you are sure that you need to make customizations.
- Create the business object, as needed.

Unless the business object appears in the Application Navigator of CRM Application Composer, you will not be able to define security policies using CRM Application Composer. You can create custom business objects for Sales, Marketing, Customer Center, Trading Community Architecture, or Order Capture applications in CRM Application Composer, as described in [Chapter 4, "Customizing Objects."](#) Business objects for all other applications must be created by a developer, administrator, or security manager, as described in [Chapter 15, "Customizing Security for ADF Application Artifacts."](#)
  - Consult the system administrator to create custom roles, as needed.

The access privileges specified by security policies you define for the custom business object are granted to application roles. Oracle Fusion Applications defines a large number of application roles based on the duties of its member end users. When an application role does not exist that adequately describe the duties pertaining to the custom business object, then a custom application role will need to be created. In those cases where you will need to use a custom role, consult a system administrator. Only a system administrator may create a new role, and optionally include the role in an existing role hierarchy.

## 9.2 Defining Security Policies for Custom Business Objects

Until you define a security policy for a custom business object, the data records exposed by that business object will be protected and end users will not have access to the data. When you want to make the custom business object accessible, you define a security policy using CRM Application Composer.

The security policy that you define in CRM Application Composer consists of the following access privileges that you select to control access to the custom business object by end users provisioned to particular roles:

- Grant **View**, **Update**, **Create**, and **Delete** privileges on the web page that displays the data records. Minimally, you must grant the **View** privilege to allow the end user to open the web page. You can also grant **Update**, **Create**, and **Delete** privileges to enable the buttons in the web page that the end user clicks to initiate these operations on the data records.

**Note:** If an **Update**, **Create**, and **Delete** privilege is not granted, the corresponding button will appear grayed out (disabled) in the web page.

- Grant **ViewAll** and **UpdateAll** privileges on the data records themselves. Minimally, you must grant the **ViewAll** privilege to populate the web page with the data records for the end user. You can also grant the **UpdateAll** privilege to enable the end user to modify the data contained in any data record exposed by the custom business object.

**Note:** When you grant the **UpdateAll** privilege, CRM Application Composer automatically grants the privileges for the edit operation button. You can enable or disable individual buttons (including edit, new, and delete) in the web page and thereby deny end users access to individual operations on the data record by selecting or deselecting the corresponding **Update**, **Create**, and **Delete** privilege.

**Before you begin:**

Create the business object. You can only define security policies on custom business objects that you create in CRM Application Composer. The custom business object must exist before you define the security policy. For more information, see [Chapter 4, "Customizing Objects."](#)

**Task: Grant View and Update Access to Multiple Roles Using the Object-Centric User Interface**

The data records exposed by a custom business object can be accessed by members of more than one application role. You can grant access privileges to the view, update, create, or delete operations for a particular custom business object for each application role. In the navigator for CRM Application Composer, you select the custom business object and then you click **Security**. In the Define Policies screen, you grant access privileges to any of the displayed application roles for the previously selected custom business object as follows:

- When you want to grant view-only access, you select only the **View** and **ViewAll** privileges.
- When you want to grant view and update access, you select the **ViewAll** and **UpdateAll** privileges.

After you select the **UpdateAll** privilege, the security policy screen automatically displays the **Edit** privilege as selected.

- When you want to allow or deny access to individual operations to edit, create, or delete data records, you can select or deselect the corresponding **Edit**, **Create**, and **Delete** privilege and leave the **UpdateAll** privilege selected.

For more information, see the "Securing Custom Objects: Explained" topic in the *Oracle Fusion Applications CRM Extensibility Guide*.

**Task: Grant View and Update Access to a Specific Role Using the Role-Centric User Interface**

Members of an application role may have access to multiple custom business objects. You can grant access privileges to view, update, create, or delete operations for each of the custom business objects for a particular application role. In CRM Application Composer, you select **Security Roles** from the Common Setup panel. In the Security Roles screen, you select a role and then you click the **Define Policies** button. In the Security Policies screen, you grant access privileges to any of the displayed custom business objects for the previously selected role as follows:

- When you want to grant view-only access, you select only the **View** and **ViewAll** privileges.
- When you want to grant view and update access, you select the **ViewAll** and **UpdateAll** privileges.

After you select the **UpdateAll** privilege, the security policy screen automatically displays the **Edit** privilege as selected.

- When you want to allow or deny access to individual operations to edit, create, or delete data records, you can select or deselect the corresponding **Edit**, **Create**, and **Delete** privilege and leave the **UpdateAll** privilege selected.

For more information, see the "Securing Custom Objects: Explained" topic in the *Oracle Fusion Applications CRM Extensibility Guide*.

## 9.3 Enabling End User Instance-Level Security Customization

In certain situations one end user may require temporary access to the data records of another end user. In this scenario, Oracle Fusion Applications supports a runtime security customization feature that lets end users elevate the privileges of another end user by conferring their own rights to view, edit, or delete individual data records. Because each data record corresponds to a business object instance, this type of runtime customization is known as *instance-level security*.

In CRM Application Composer, this end user security configuration feature is enabled on the custom business object during page customization. At runtime, the page that displays the data records of the enabled custom business object will display a **Manage Permissions** button that opens a dialog that displays the list of end users to whom additional privileges may be granted. The privileges the dialog displays will be limited to the privileges available to the conferring end user, as defined in CRM Application Composer for the user's provisioned roles and the currently displayed custom business object.

Additionally, to complete the configuration of this runtime security customization feature in CRM Application Composer, you must grant sufficient privileges to the roles which may be conferred a higher level of access by another end user in order to enable the Edit and Delete buttons in the user interface so that the user with elevated privileges can invoke edit or delete operations on the data record.

### Before you begin:

Create the appropriate security policy on the custom business object for the conferring end user. The end user can only confer the access privileges to a data record that they already possess. This requirement means that the conferring end user's role must have the **ViewAll** or **UpdateAll** privileges granted in CRM Application Composer to be able to confer the right to view, edit, and delete a particular data record.

Create the appropriate security policy on the custom business object to be accessed by the target end user. At runtime, in Oracle Fusion application, the end user to whom the rights are granted must also have the privileges needed to select the buttons the web page displays to invoke the create, edit, or delete operations on the data records of the custom business object. This requirement means at least one role of the target end user must have the **View**, **Update**, and **Delete** privileges granted for the specific custom business object in CRM Application Composer. Otherwise, without these privileges, the Oracle Fusion application will display the web page with the Edit and Delete buttons grayed out (disabled) for the business object.

### Task: Enabling End Users to Elevate the Access Privileges of Other End Users for a Business Object in a Specific Page

The data records of a custom business object represent instances of the object. You can enable a runtime security configuration feature that allows one end user to elevate the rights of another end user to access individual business object instances displayed in a specific page. Instance-level security lets one end user confer their own access privileges to other end users of the Oracle Fusion application in the enterprise. In the navigator for CRM Application Composer, to enable this runtime security configuration feature, you select the custom business object and then you click **Page**. In either of the **Pages** panels, you click through the page creation workflow until you reach the **Configure Landing and Creation Pages** task, and you then select **Allow Access Grant**. For more information, see the "Securing Custom Objects: Explained" topic in the *Oracle Fusion Applications CRM Extensibility Guide*.

**Task: Enabling End Users to Elevate the Access Privileges of Other End Users for a Business Object on Any Page**

The data records of a custom business object represent instances of the object. You can enable a runtime security configuration feature that allows one end user to elevate the rights of another end user to access individual business object instances when they appear in any page. Instance-level security lets one end user confer their own access privileges to other end users of the Oracle Fusion application in the enterprise. In the navigator for CRM Application Composer, to enable this runtime security configuration feature, you select the custom business object and then you click **Security**. In the object-centric Define Policies screen, you select **Grant Access** for the desired application role. Alternatively, you can use the role-centric Define Policies screen to enable the same runtime security configuration feature. For more information, see the "Securing Custom Objects: Explained" topic in the *Oracle Fusion Applications CRM Extensibility Guide*.

## 9.4 Preventing Corrupted Security Policies in CRM Application Composer

CRM Application Composer creates a variety of security artifacts, which together provide security for the CRM application. Once you define or edit a security policy in CRM Application Composer, authorized developers or security managers may be able to access the security repository and view the security policy. However, in the current release of Oracle Fusion Applications, even browsing the security policies for custom objects in tools such as Oracle Authorization Policy Manager or Oracle Fusion Functional Setup Manager may corrupt the security artifacts created in CRM Application Composer.

---

**Important:** Security managers must not use Oracle Authorization Policy Manager or Oracle Fusion Functional Setup Manager to browse or edit the security policies that you create in CRM Application Composer. Security policies created for custom objects, should therefore only be edited within CRM Application Composer.

---

# **Part III**

---

## **Developer Customizations and Extensions**

Part III contains the following chapters:

- [Chapter 10, "Using JDeveloper for Customizations"](#)
- [Chapter 11, "Customizing and Extending ADF Application Artifacts"](#)
- [Chapter 12, "Customizing and Extending SOA Components"](#)
- [Chapter 13, "Customizing and Extending Oracle BPM Project Templates"](#)
- [Chapter 14, "Customizing and Extending Oracle Enterprise Scheduler Jobs"](#)
- [Chapter 15, "Customizing Security for ADF Application Artifacts"](#)
- [Chapter 16, "Translating Custom Text"](#)
- [Chapter 17, "Configuring End User Personalization"](#)
- [Chapter 18, "Customizing Help"](#)



# 10

---

## Using JDeveloper for Customizations

This chapter describes how to configure JDeveloper for implementing customizations.

This chapter includes the following sections:

- [Section 10.1, "About Using JDeveloper for Customization"](#)
- [Section 10.2, "Customizing Oracle ADF Artifacts with JDeveloper"](#)
- [Section 10.3, "Customizing SOA Composites with JDeveloper"](#)

### 10.1 About Using JDeveloper for Customization

You use JDeveloper when you need to customize or create business objects or security outside of CRM applications, or when you need to make more sophisticated changes, like changes to SOA composites, ESS jobs, BPM project templates, or embedded help. While you use JDeveloper to both customize existing standard objects and to create new custom objects, the procedures you use for each are different.

New custom objects created in JDeveloper are not saved into the MDS repository, and so are done in a standard application workspace using the Oracle Fusion Applications Developer role. However, when you customize standard objects, those customizations *are* saved into the MDS repository, and so must be done using the Oracle Fusion Applications Administrator Customization role. Doing the customizations using the customization role ensures that your changes are saved to the upgrade-safe MDS repository, and not written directly to the standard object. In the future, when you patch or upgrade your Oracle Fusion Applications, your customizations held in these metadata files will not be touched, and so, you will not have to redo them. For more information about customizations and the MDS repository, see [Chapter 1, "Customizing and Extending Oracle Fusion Applications."](#)

When customizing ADF artifacts, you create a special customization application workspace, using the developer role. This workspace includes a connection to a deployed Oracle Fusion Applications environment (normally a test environment), which allows you to import the artifacts you want to customize into your workspace. This customization workspace is automatically configured to work within Oracle Fusion Applications, so that when you test and deploy your customizations, they will behave as though they were native Oracle Fusion Applications. When customizing SOA composite applications, you create a SOA Composite application workspace in the developer role.

Once the workspace is created, you switch roles to the customization role and import the ADF artifact or the SOA archive you want to customize. You then make your customizations to the imported artifact. Once done, you package and deploy the artifacts in the workspace to the Oracle Fusion Applications environment.

Often, you will need to perform both customizations (customizing an existing standard object) and extensions (creating a new object). For example, say you want to create a new entity object and expose that new object in an existing application module. First, because you are creating a new custom entity object, you would create a standard application workspace and then create your entity object. Once complete, you would package the workspace as an ADF Library, and place it into the exploded EAR directory for your test environment. Next, you would create a customization application workspace, and import both the new entity object library and the library that contains the application module to which you need to add the entity object. Once both are imported, you log in using the customization role and make the customizations to the application module. Once customizations are complete, you would deploy the customizations to the test environment.

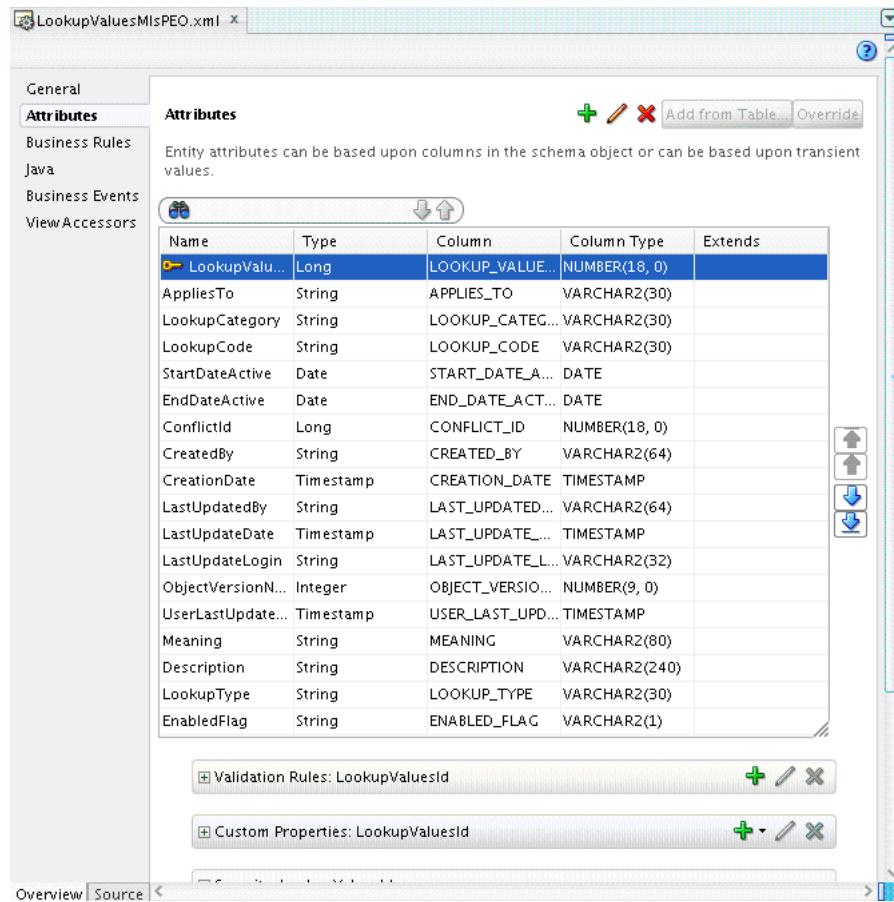
### 10.1.1 About Customizing Oracle ADF Artifacts

Oracle Fusion applications are built using Oracle ADF artifacts on Oracle Fusion Middleware, including the following:

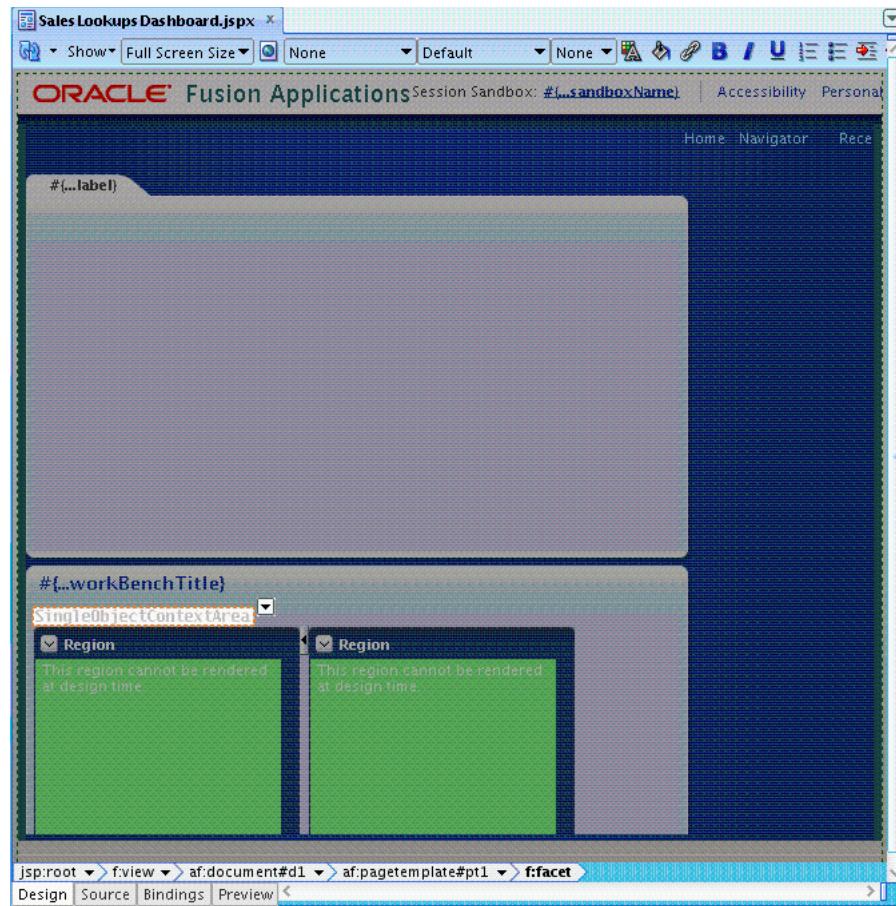
- Application modules: An application module is the transactional component that UI clients use to work with application data. It defines an updateable data model along with top-level procedures and functions (called service methods) related to a logical unit of work related to an end-user task.
- Entity objects: An entity object represents a row in a database table and simplifies modifying its data by handling all data manipulation language (DML) operations for you. It can encapsulate business logic to ensure that your business rules are consistently enforced. You associate an entity object with others to reflect relationships in the underlying database schema to create a layer of business domain objects to reuse in multiple applications.
- View objects: A view object represents a SQL query and simplifies working with its results. You use the SQL language to join, filter, sort, and aggregate data into the shape required by the end-user task being represented in the user interface. This includes the ability to link a view object with other view objects to create master-detail hierarchies of any complexity. When end users modify data in the user interface, your view objects collaborate with entity objects to consistently validate and save the changes.
- Task flows: Task flows determine the flow of control throughout an application. They also can be included in a page as a region, where users can navigate through a series of page fragments, without leaving the original page.
- JSPX pages and page fragments: The view layer of Oracle Fusion Applications consists of a small number of pages per application. These pages then contain task flows, which in turn contain a number of page fragments.

For more information about Oracle ADF components, please refer to the *Oracle Fusion Middleware Developer's Guide for Oracle Application Development Framework*.

When you customize Oracle ADF artifacts, you usually work in an overview editor that allows you to make your customizations declaratively. For example, Figure 10–1 shows the editor for an entity object. Among other things, you can set validation or change how the UI displays the data.

**Figure 10–1 Overview Editor for Entity Object**

For JSP pages, you work in a WYSIWYG environment using the Design tab in the editor window, as shown in [Figure 10–2](#).

**Figure 10–2 Design Editor for JSP Pages**

### 10.1.2 About Using JDeveloper to Customize SOA Composites

Oracle Fusion applications are built using SOA composite artifacts on Oracle Fusion Middleware, which include the following:

- Service components: Service components implement the business logic or processing rules of a SOA composite. Available service components include the following:
  - BPEL processes that enable you to integrate a series of business activities and services into an end-to-end business process flow.
  - Business rules that enable you to create business decisions in your business process flow based on rules.
  - Human tasks that enable you to create human workflows that describe the tasks for users or groups to act upon as part of an end-to-end business process flow. You use the graphical interface tool Oracle BPM Worklist to act upon the tasks during runtime.
  - Mediators enable you to define services that perform message and event routing, filtering, and transformations within the SOA composite.
- Binding components: Binding components establish the connection between a SOA composite and the external world. There are two types of binding components:

- Services provide the outside world with an entry point to the SOA composite. The WSDL file of the service advertises its capabilities to external applications. These capabilities are used for contacting the SOA composite components. The binding connectivity of the service describes the protocols that can communicate with the service (for example, SOAP/HTTP or a JCA adapter).
- References enable messages to be sent from the SOA composite application to external services in the outside world.
- Wires connect services, service components, and references into a complete SOA composite.

For more information about SOA composites, see the *Oracle Fusion Middleware Developer's Guide for Oracle SOA Suite*.

### 10.1.3 Before You Begin Using JDeveloper to Customize

Before you use JDeveloper to customize, you should be familiar with the Oracle Fusion application architecture that enables customization, as described in [Chapter 1, "Customizing and Extending Oracle Fusion Applications."](#) You should also understand the typical workflows for working with customizations, as described in [Chapter 2, "Understanding the Customization Development Lifecycle."](#)

You will need to do the following before you can use JDeveloper to customize:

- The application you are customizing must be deployed to a test environment, and you must have access to the exploded EAR directory for that application.
- Download and install JDeveloper, and set up your development environment, as documented in "Chapter 2 Setting Up Your Development Environment" of the *Oracle Fusion Applications Developer's Guide*.

## 10.2 Customizing Oracle ADF Artifacts with JDeveloper

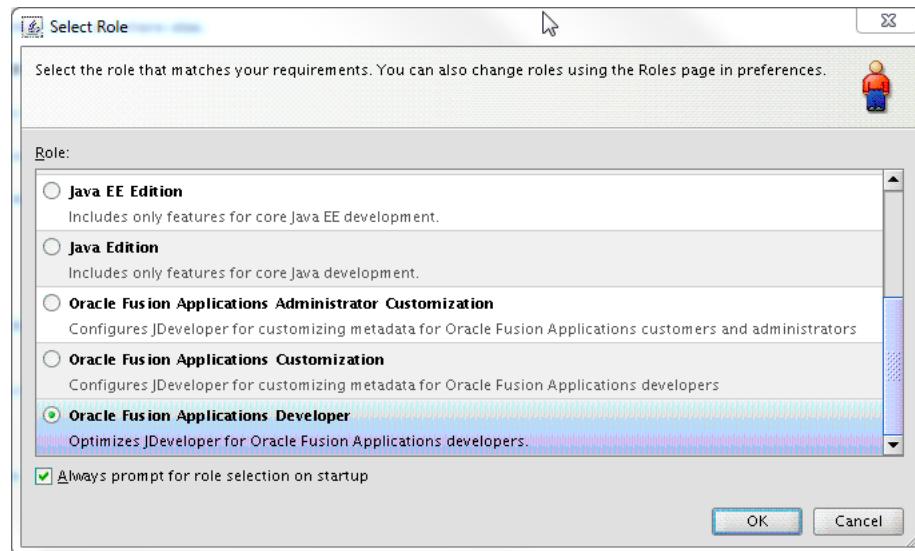
To customize ADF artifacts, you first create a customization application workspace, using the **Oracle Fusion Applications Developer** role in JDeveloper. Once the workspace is created, you exit JDeveloper and then reenter, using the **Oracle Fusion Applications Administrator Customization** role and import and customize your artifacts.

### 10.2.1 Creating the Customization Application Workspace

You need to set up a customization workspace in JDeveloper to create the application that will hold your customizations.

#### To create the Application Workspace

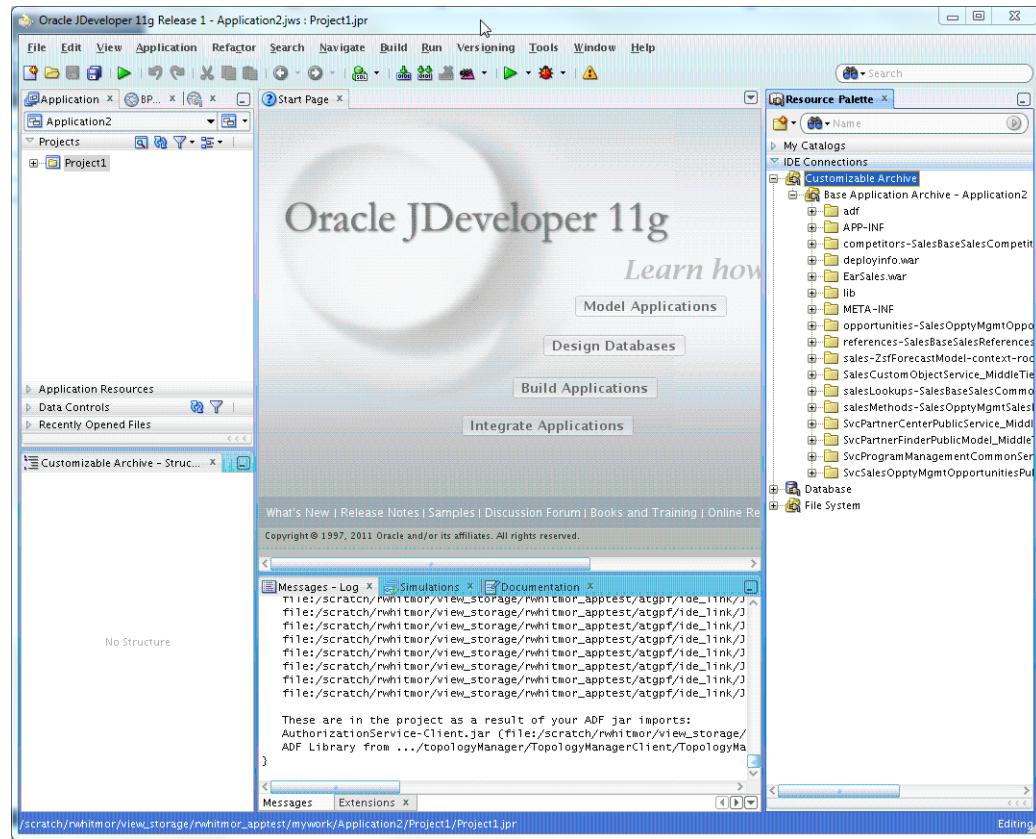
1. Start JDeveloper using the Oracle Fusion Applications Developer role, as shown in [Figure 10–3](#).

**Figure 10–3 Oracle Fusion Applications Developer Role**

2. In JDeveloper, choose **File > New** to open the New Gallery. In the New Gallery, select **Applications > Fusion Applications Customization Application**.
3. In the Step 1 page of the FA Customization Application dialog, enter the following and click **Next**:
  - **Application Name and Directory:** This will be the name and location of your customization application, and can be anything you like.
  - **Fusion Database:** Enter the connection to your Fusion database.
  - **Application Package Prefix:** This can be anything, but must not start with `oracle`.
  - **Deployed Application Ear:** Browse to the exploded ear for the application you want to customize.
  - **Policy Store Security Information:** Browse to the imported `jazn-data.xml` file. You only need to do this if you will be customizing security policies. For more information, see [Chapter 15, "Customizing Security for ADF Application Artifacts."](#)
4. Complete the wizard by changing any default settings as needed.

Once you complete the wizard, an application with a project is created for you. This application is configured to be the same as a deployed Oracle Fusion application. For example, it is connected to the same database, same metadata repository, and has similar `web.xml` and `weblogic.xml` settings. This configuration allows it to work correctly when deployed into your Oracle Fusion Applications environment, and also ensures that when you test your customizations locally in the JDeveloper integrated WebLogic server, the customizations will behave as they will in the full test environment.

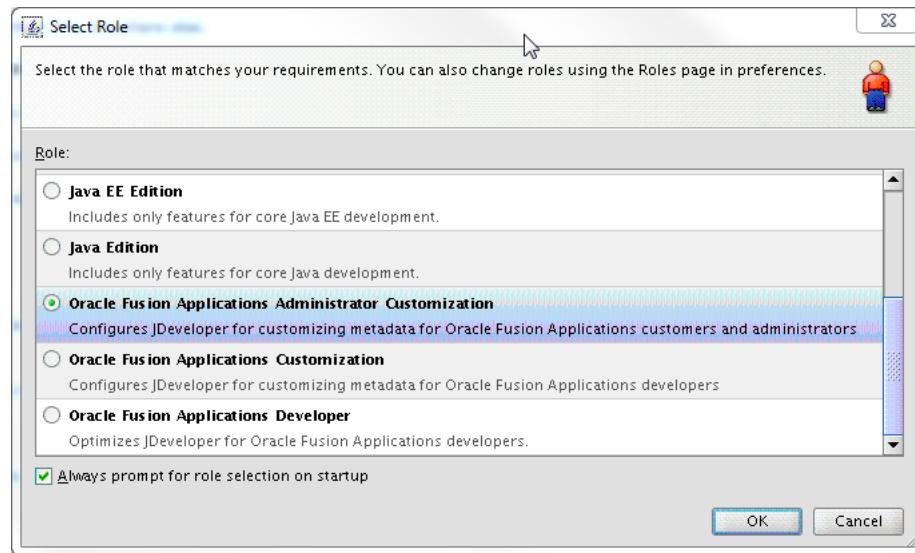
JDeveloper also creates a connection to the exploded EAR directory named **Customizable Archive**, which is accessible from the Resource Palette. [Figure 10–4](#) shows the connection to the exploded EAR directory for the Sales application.

**Figure 10–4 Resource Palette Connection to Exploded Ear Contents**

## 10.2.2 Customizing the Artifacts

You need to switch to the **Customization Developer** role before you can begin customizing.

1. Restart JDeveloper and select the **Oracle Fusion Applications Administrator Customization** role, as shown in [Figure 10–5](#).

**Figure 10–5 Oracle Fusion Applications Administrator Customization Role**

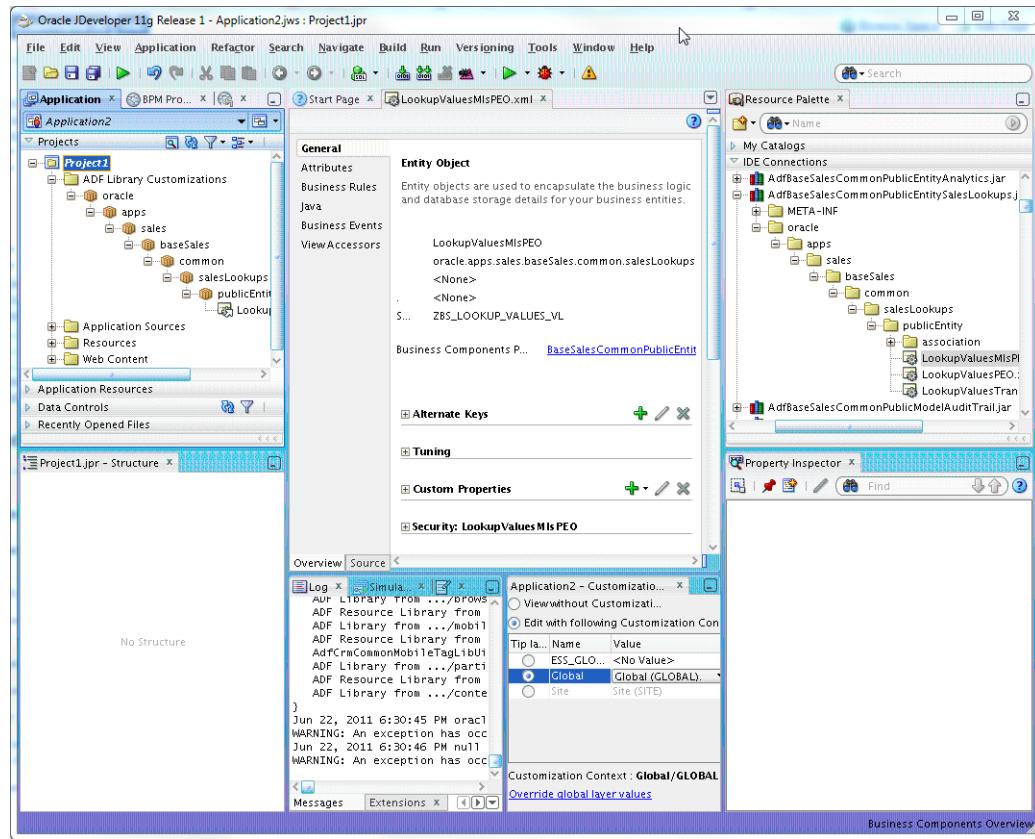
2. In the Resource Palette, expand the **IDE Connection** section, expand the exploded ear, and browse to find the artifact you want to customize.

**Tip:** you can use the **Search** field to find the artifact. Click the Search icon to choose to search by name, file type, or description. To do an advanced search, right-click the folder for search in and choose **Advanced Search**.

For help in determining which artifacts you may need to customize, see [Section 10.2.3, "Determining What ADF Artifacts You Need to Customize."](#)

3. Right-click the artifact, and choose **Customize**, and choose to add the associated library to the project.

The artifacts from the imported library now display in the Application Navigator pane, under the **ADF Library Customizations** node, and the artifact you selected to customize opens in the editor window, as shown in [Figure 10–6](#).

**Figure 10–6 JSPX Page Open in Editor and Ready to Customize**

**Note:** If imported data controls are not displaying in the Data Controls panel, do the following:

1. In the JDeveloper menu, go to **Tools > Preferences** to open the Preferences dialog.
2. Expand the **Business Components** node.
3. Select **General**.
4. Select **Display Imported ADF Libraries in Data Control Palette**.

4. In the Customization Context window (by default, displayed at the bottom of JDeveloper), select the layer that you want the customizations written to.

All customizations for ADF business components must be done in the Global layer. View layer customizations can be made in any other layer except User. For more information about customization layers, see [Section 1.2, "Understanding Customization Layers."](#)

You are now ready to begin customizing your artifact. For more information about customizing specific artifacts, see the following chapters:

- [Chapter 11, "Customizing and Extending ADF Application Artifacts"](#)
- [Chapter 14, "Customizing and Extending Oracle Enterprise Scheduler Jobs"](#)
- [Chapter 15, "Customizing Security for ADF Application Artifacts"](#)
- [Chapter 17, "Configuring End User Personalization"](#)

- [Chapter 18, "Customizing Help"](#)

### 10.2.3 Determining What ADF Artifacts You Need to Customize

Most often, the customizations you want to make will be surfaced on an existing page. For example, say you want to add a field to a page. So you first need to determine the page to customize, which may actually be a page fragment within a task flow. You then need to determine which business objects you'll need to customize to add the field.

The easiest way to determine what artifacts you will need to customize is to follow this path:

1. In a runtime environment, access the page you want to customize and open it in the Source view of Oracle Composer. The page's structure is displayed, and from here, you can determine the page name, or if the customization is actually on a page fragment within a task flow, you can determine the task flow name. For more information about using Oracle Composer, see [Chapter 3, "Customizing Existing Pages."](#)
2. If you need to customize a page fragment (.jspx) file within a task flow, from Oracle Composer, click **Customization Manager**, to open the page in Customization Manager. From here, you can determine the .jspx file name.
3. In JDeveloper, once you have created a connection to the exploded ear directory, you can use the search field to search for the .jspx file or the task flow file.

**Tip:** you can use the **Search** field to find the artifact. Click the Search icon to choose to search by name, file type, or description. To do an advanced search, right-click the folder for search in and choose **Advanced Search**.

4. Right-click the file and choose **Customize** to import the file and open it in JDeveloper.
5. Right-click the file, and choose **Go to Page Definition**.  
The page definition file will show you the view objects being used by the components on the page to return the data.
6. Open the view object in JDeveloper.

The view object can be customized, or if needed, you can determine the associated entity object and customize that. You can also determine the application module from here.

### 10.2.4 Importing Customizations into Your Workspace

There may be occasions when you need to import other customizations into your workspace. For example, someone else may have made customizations to an application module to which you need to make changes as well. Before you make your customization, you need to import that application module into your customization workspace.

If you need to import customizations made to a single page or page fragment, you can use Customization Manager to download the file, as described in [Section 2.3.3, "Downloading and Uploading Customization Files."](#) Save the customization file(s) to a zip or JAR file.

If you need to import multiple customizations available in the metadata repository for an application, you use the `exportMetadata` WebLogic scripting tool command. For more information, see the "Application Metadata Management Commands" section of *Oracle Fusion Middleware WebLogic Scripting Tool Command Reference*. This command saves the customization files in a JAR file that you can import into your workspace. For procedures, see the "Viewing ADF Library Runtime Customizations from exported JARs" section of the *Oracle Fusion Middleware Fusion Developer's Guide for Oracle Application Development Framework*.

**Tip:** You can also use Fusion Middleware Control to import and export customization files. For more information, see the "Transferring Metadata Using Fusion Middleware Control" section of the *Oracle Fusion Middleware Administrator's Guide*.

If you want to use extensions (for example, if you want to add a custom entity object to an existing application module), that extension must be deployed into the environment to which you have a connection. For more information, see [Section 11.11, "Deploying ADF Customizations and Extensions."](#)

## 10.3 Customizing SOA Composites with JDeveloper

Before you begin customizing, you must identify the SAR file to customize, retrieve the configuration plan from the default composite in the MDS repository, and set up the workspace and composite project for MDS customization in JDeveloper using the **Oracle Fusion Applications Developer** role. Once the workspace is created, you must exit and reenter JDeveloper using the **Oracle Fusion Applications Administrator Customization** role.

### 10.3.1 Before You Begin Using JDeveloper to Customize

Perform the following tasks before you begin customizing SOA composites with JDeveloper:

1. Identify the SAR file to customize, and locate it in the `APPLICATIONS_BASE/fusionapps/applications/product_family/deploy` directory. This directory includes the following files:
  - Composite SAR (`sca_*.jar`)
  - BPM template (`bta_*.jar`)
  - List resource bundle classes (`jar_*.jar`)
2. Ensure that the SAR file is marked as customizable by Oracle Fusion Applications. Otherwise, customizations do not survive patching or are not properly patched and merged. For information about which SOA composites are customizable, see the product-specific documentation from Oracle Enterprise Repository available from Oracle Support.

If you encounter the following message when importing the SAR for customization, it means that Oracle Fusion Applications did not mark the composite for customizations in JDeveloper and your changes cannot survive patching.

The composite from the archive was not created for customization. If you import the composite for customization, you can customize it but you will have problems to merge your customizations to any new versions of that composite.

Do you want to continue?  
Otherwise, uncheck "Import for Customization" box, and  
click "Finish" option.

3. Get the configuration plan from the default composite in the MDS repository using the following WLST commands:

- a. Determine the default revision of the composite with `sca_getDefaultCompositeRevision`. For example:

```
wls:/mydomain/ServerConfig> sca_getDefaultCompositeRevision("myhost",
"7001", "weblogic", "weblogic",
"FinGlCurrencyUserPreferredCurrencyComposite")
```

- b. Export the full composite corresponding to the default revision with `sca_exportComposite`. For example:

```
wls:/offline/mydomain/ServerConfig> sca_
exportComposite('http://myhost:8001', 'none', '/tmp/sca_
FinGlCurrencyUserPreferredCurrencyComposite.0.jar',
'FinGlCurrencyUserPreferredCurrencyComposite',
'1.0')
```

- c. Extract the configuration plan used originally with the export action with `sca_extractPlan`. For example:

```
wls:/mydomain/ServerConfig> sca_extractPlan("/tmp/sca_
FinGlCurrencyUserPreferredCurrencyComposite_
rev1.0.jar", "/tmp/FinGlCurrencyUserPreferredCurrencyComposite_
configPlan.xml")
```

For information about using these commands, see *Oracle Fusion Middleware WebLogic Scripting Tool Command Reference*.

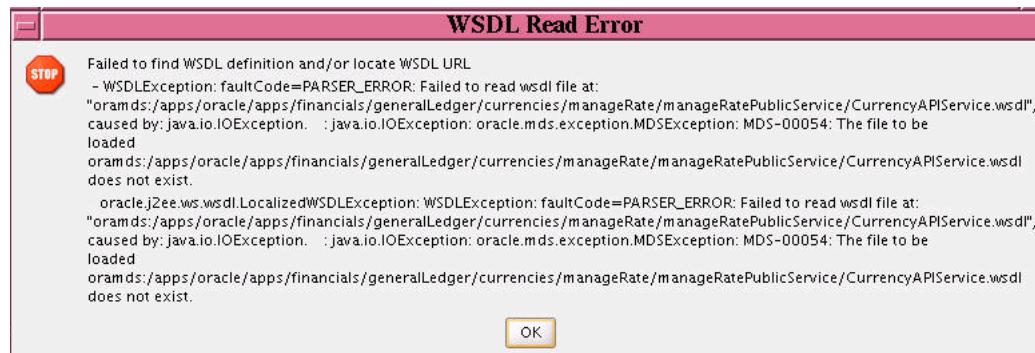
### 10.3.2 Setting Up the JDeveloper Workspace and Composite Project for MDS Customization

#### To set up the JDeveloper workspace and composite project for MDS customization:

1. Start JDeveloper using the **Oracle Fusion Applications Developer** role.
2. From the **File** main menu, select **New > Applications > SOA Application > OK** to create a SOA application with an XX prefix in the application name.

The XX prefix identifies an artifact or object created by the customer and distinguishes it from artifacts of Oracle Fusion Applications. You can delete the SOA project named **Project1** that was created by default.

The Oracle Fusion Applications composite references shared artifacts through the SOA-shared repository stored in MDS instead of replicating the shared artifact throughout the Oracle Fusion Applications code source. If the references to the SOA shared repository are not resolved, you receive the error message shown in [Figure 10–7](#).

**Figure 10–7 WSDL Read Error Message**

3. To resolve references to the SOA-shared repository (oramds:/apps), define an MDS entry in the `adf-config.xml` file to point to the SOA Infrastructure MDS partition in the MDS schema corresponding to the SOA cluster where you plan to deploy the customized composite. Add a `<namespace>` attribute with `path="/apps"` to `<metadata-namespaces>`:

```
<namespace metadata-store-usage="mstore-usage_2" path="/apps" />
```

4. Add a `<metadata-store-usage>` attribute to `<metadata-store-usages>` for a database-based MDS that points to the SOA Infrastructure MDS partition in the SOA MDS schema.
5. Replace the database schema name, database server, database port, and database name with actual values. To determine the user name, password, and database connection information, see the configuration for the MDS-SOA data source in the Oracle WebLogic Server Administration Console.

```
<metadata-store-usage id="mstore-usage_2">
  <metadata-store class-name="oracle.mds.persistence.stores.db.
    DBMetadataStore">
    <property value="soa_mds_schema_name" name="jdbc-userid"/>
    <property value="soa_mds_schema_password" name="jdbc-password"/>
    <property value="jdbc:oracle:thin:@database_server:
      database_port:database_name" name="jdbc-url"/>
    <property value="soa-infra" name="partition-name"/>
  </metadata-store>
</metadata-store-usage>
```

The following code shows an `<adf-mds-config>` example in `adf-config.xml`. The `mstore-usage_2` entry resolves references to the SOA shared repository:

```
<adf-mds-config xmlns="http://xmlns.oracle.com/adf/mds/config">
  <mds-config xmlns="http://xmlns.oracle.com/mds/config">
    <persistence-config>
      <metadata-namespaces>
        <namespace metadata-store-usage="mstore-usage_1" path="/soa/shared"/>
        <namespace metadata-store-usage="mstore-usage_2" path="/apps"/>
      </metadata-namespaces>
      <metadata-store-usages>
        <metadata-store-usage id="mstore-usage_1">
          <metadata-store
            class-name="oracle.mds.persistence.stores.file.FileMetadataStore">
            <property value="${oracle.home}/integration"
              name="metadata-path"/>
            <property value="seed" name="partition-name"/>
          </metadata-store>
        </metadata-store-usage>
      </metadata-store-usages>
    </persistence-config>
  </mds-config>
</adf-mds-config>
```

```

        </metadata-store>
        </metadata-store-usage>
        <metadata-store-usage id="mstore-usage_2">
            <metadata-store
                class-name="oracle.mds.persistence.stores.db.DBMetadataStore">
                <property value="FIN_FUSION_MDS_SOA" name="jdbc-userid"/>
                <property value="FIN_FUSION_MDS_SOA" name="jdbc-password"/>
                <property
                    value="jdbc:oracle:thin:@database_server.us.example.com:1521:database_name"
                    name="jdbc-url"/>
                <property value="soa-infra" name="partition-name"/>
            </metadata-store>
        </metadata-store-usage>
        </metadata-store-usages>
    </persistence-config>
</mds-config>
</adf-mds-config>

```

6. From the **File** main menu, select **Import > SOA Archive Into SOA Project** to import the SAR, then click **OK**.
7. In the **Project Name** field, enter the name of the new SOA project with an XX prefix and select a name to identify the base composite that you are extending. For example, specify `XXFinGlCurrencyUserPreferredCurrencyComposite` if you are customizing `FinGlCurrencyUserPreferredCurrencyComposite`.
8. Click **Next**.
9. In the **Composite Archive** field, perform the following steps:
  - a. Click **Browse** to select the SAR to customize that you identified in [Section 10.3.1, "Before You Begin Using JDeveloper to Customize."](#)
  - b. Accept the default setting for the composite name.
  - c. Select the **Import for Customization** checkbox.
  - d. Click **Finish**.

You accept the default composite name to ensure that patching and SOA can determine whether runtime customizations, JDeveloper customizations, or both types have been applied to the composite. If the composite is renamed, patching and SOA have no knowledge of the renamed composite.

You may see an error icon on a partner link in the `composite.xml` design view that reports the following error:

```
Couldn't resolve classpath:/META-INF/wsdl/ServiceException.wsdl
```

This error is addressed in subsequent steps.

10. Right-click the composite project and go to **Project Properties > Libraries and Classpath**.
11. Click **Add Library**, and select the **BC4J Service Client** library.
12. Click **OK** to close the Add Library dialog.
13. Click **OK** to close the Project Properties dialog.

By adding this library to your SOA project, you avoid the design time error you may have received in Step 9d.

14. Click the **Validate** icon in the `composite.xml` design view. The error shown in Step 9d that you may have received for the partner link should now be resolved.

**15.** Make the customization classes and values available in your project.

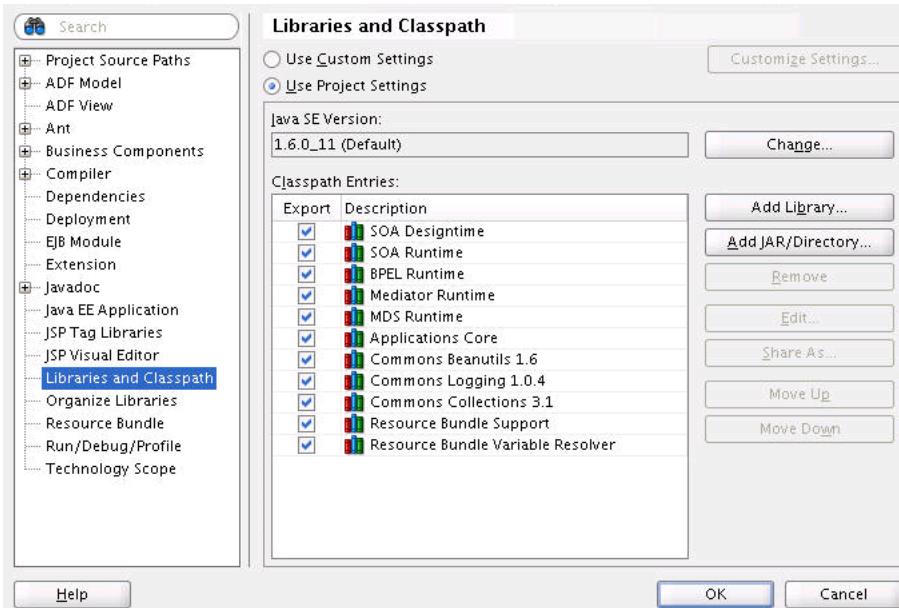
There are two types of customization classes:

- Applications Core customizing classes are available from the Application Core shared library. See [Section 1.2, "Understanding Customization Layers"](#) for the list of Applications Core customization classes permitted in JDeveloper.
- Product team customization classes are available in the appropriate EAR file. These customization classes are bundled in a JAR file in the EAR's APP-INF/lib directory. These JAR files follow a naming convention of Ext...jar. Therefore, you must get these JAR files from the deployed area, and perform the following steps:
  - Put the customization class JAR file under \$JDEV\_HOME/jdev/extensions.
  - Add the JAR file in the new project's library and class path setting.

**16.** Right-click the composite project and go to **Project Properties > Libraries and Classpath**.

**17.** Add the **Applications Core** library to the composite project, as shown in [Figure 10–8](#).

**Figure 10–8 Applications Core Library**



**18.** Go to **Application Resources > Descriptors > ADF META-INF > adf-config.xml**.

**19.** Add the appropriate customization class in the MDS Configuration, such as `oracle.apps.fnd.applcore.customization.SiteCC`.

**20.** Right-click the composite project and go to **Project Properties > Libraries and Classpath**.

The following libraries have now been added:

- Application Core
- BC4J Service Client

### 10.3.3 Customizing the Composite

**To customize the composite:**

1. Start JDeveloper with the **Oracle Fusion Applications Administrator Customization** role.
2. Select the value for the layer in the Customization Context dialog that you want to customize. [Figure 10–9](#) provides details.

**Figure 10–9 Customization Context Dialog**



3. See [Chapter 12, "Customizing and Extending SOA Components"](#) for instructions on customizing the composite during design time in JDeveloper and runtime with Oracle SOA Composer, Oracle BPM Worklist, and Oracle Enterprise Manager Fusion Applications Control.
4. When introducing new components, partner links, and artifacts to the composite, prefix the names with XX to prevent problems with existing and future components that may be introduced in Oracle Fusion Applications patches.
5. Use the configuration plan that you extracted in Step 3 of [Section 10.3.1, "Before You Begin Using JDeveloper to Customize."](#) If any new partner links were added to your composite, add entries to the configuration plan, if needed. For information about configuration plans, see Section "Customizing Your Application for the Target Environment Prior to Deployment" of *Oracle Fusion Middleware Developer's Guide for Oracle SOA Suite*.
6. Deploy the composite using the same revision you found in [Section 10.3.1, "Before You Begin Using JDeveloper to Customize."](#)

### 10.3.4 Customizing SOA Resource Bundles

[Table 10–1](#) describes how to customize SOA resource bundles.

**Table 10–1 Customizing SOA Resource Bundles**

To Modify or Add Translatable Strings For...	Description
An existing human task, activity guide, or BPEL process	<p>This feature is not supported in the first version of Oracle Fusion Applications (for example, modifying the human task title).</p> <p>Runtime modifications do not support this functionality and the .task, .ag, and .agdl files are not customizable in JDeveloper.</p>

**Table 10–1 (Cont.) Customizing SOA Resource Bundles**

To Modify or Add Translatable Strings For...	Description
Human task mapped attributes	<p>This feature is not supported in the first version of Oracle Fusion Applications.</p> <p>Translations for human task mapped attribute labels are defined in the following resource bundle:</p> <pre>oracle.bpel.services.workflow.resource.WorkflowLabels</pre> <p>For this version, the <code>WorkflowLabels</code> resource bundle is deployed to the SOA clusters in the Customer Relationship Management (CRM) and Human Capital Management (HCM) domains. Any customizations to the resource bundle are overwritten with future patches.</p>
Server name in Federated Worklist on the Oracle Fusion Applications home page	<p>The server names that appear in the Federated Worklist on the Oracle Fusion Applications home page are defined in the following file:</p> <pre>oracle/apps/common/acr/resource/ResourcesAttrBundle.xliff</pre> <p>See <a href="#">Section 11.10, "Customizing or Adding Resource Bundles"</a> for instructions on overriding strings in XLIFF resource bundles.</p>

---

**Note:** Oracle Fusion Applications automatically seed human task-protected mapped attributes and labels, but do not seed public mapped attributes. If you require human task mapped attributes, it is recommended that you use the public mapped attributes. However, if protected mapped attributes are required, then prefix your label names with XX to prevent problems with Oracle Fusion Applications seeded labels.

---



---

# Customizing and Extending ADF Application Artifacts

This chapter describes how to use JDeveloper to customize and extend application artifacts.

This chapter includes the following sections:

- [Section 11.1, "About Customizing Oracle ADF Application Artifacts"](#)
- [Section 11.2, "Editing Existing Business Components"](#)
- [Section 11.3, "Editing Task Flows"](#)
- [Section 11.4, "Editing Pages"](#)
- [Section 11.5, "Creating Custom Business Components"](#)
- [Section 11.6, "Creating Custom Task Flows"](#)
- [Section 11.7, "Creating Custom Pages"](#)
- [Section 11.8, "Customizing or Creating a Custom Search Object"](#)
- [Section 11.9, "Editing the UI Shell Template"](#)
- [Section 11.10, "Customizing or Adding Resource Bundles"](#)
- [Section 11.11, "Deploying ADF Customizations and Extensions"](#)

## 11.1 About Customizing Oracle ADF Application Artifacts

With the customization features provided by Oracle Metadata Services (MDS), developers can customize Oracle Fusion Applications using JDeveloper, making modifications to suit the needs of a particular group, such as a specific country or site.

Using JDeveloper, you can implement customizations on existing artifacts that are stored in a metadata repository and retrieved at run time to reveal the customized application. You can also extend your application with new custom artifacts that are packaged into a JAR file, and integrated using customizations on the existing application.

Note that many kinds of customization can be performed in the runtime environment using CRM Application Composer, which allows you to customize existing objects and extend an application with new objects for the following CRM applications:

- Sales
- Marketing
- Customer Center

- Trading Community Architecture
- Order Capture

For more information about using CRM Application Composer to customize these applications, see [Chapter 4, "Customizing Objects."](#)

However some kinds of customization (including all customizations to applications other than those listed above) require a lower level approach, for which you will need to use JDeveloper.

### 11.1.1 Before You Begin Customizing Oracle ADF Application Artifacts

Before you customize application artifacts (such as entity objects, view objects, application modules, and pages) using JDeveloper, you should be familiar with the Oracle Fusion application architecture that enables customization, as described in [Chapter 1, "Customizing and Extending Oracle Fusion Applications."](#) You should also understand the typical workflows for working with customizations, as described in [Chapter 2, "Understanding the Customization Development Lifecycle."](#)

Before you make any changes to the data model such as adding entity objects or attributes, first check to see if there are existing flexfields that meet your needs. For more information, see [Chapter 5, "Using Flexfields for Custom Attributes."](#)

In addition, you will need to perform the following tasks before you can begin customizing your application:

- Set up a test environment.

All application artifact customizations should be deployed to a test environment. For more information, see [Chapter 2, "Understanding the Customization Development Lifecycle."](#)

- Determine which artifacts you want to customize.

Before you can implement customizations using JDeveloper, you must first determine which business objects you want to customize, so that you can create a workspace that imports the necessary parts of the application. For more information, see [Section 10.2, "Customizing Oracle ADF Artifacts with JDeveloper."](#)

- Create an application workspace.

Before you can implement customizations using JDeveloper, you must create a workspace that imports the necessary parts of the application you want to customize. For more information, see [Section 10.2.1, "Creating the Customization Application Workspace."](#)

- Launch JDeveloper in the appropriate role.

If you are implementing customizations on existing application artifacts, you must select the **Oracle Fusion Applications Administrator Customization** role when you launch JDeveloper.

If you are creating new custom application artifacts (such as, entity objects, view objects, and pages), you must select the **Oracle Fusion Applications Developer** role when you launch JDeveloper.

- Select a layer value.

When customizing application artifacts in JDeveloper, you first need to select the layer and layer value to work in. You use the Customization Context window to make this selection. When customizing business components, such as entity

objects and view objects, you must use the `global` layer. For more information about customization layers, see [Section 1.2, "Understanding Customization Layers."](#)

## 11.2 Editing Existing Business Components

When customizing an application in JDeveloper, be aware that the layer in which you choose to implement customizations has an impact on what kinds of customizations you can perform. If you want to customize an ADF Business Components object, such as an entity object or view object, you must use the `global` layer.

### Before You Begin

Before you start customizing business objects, you'll need to determine which business objects you want to customize and create an application customization workspace. For more information, see [Section 11.1.1, "Before You Begin Customizing Oracle ADF Application Artifacts."](#)

Then when customizing ADF artifacts, you need to launch JDeveloper in the **Oracle Fusion Applications Administrator Customization** role, and select the `global` layer.

### Task: Edit Database Tables

Using the SQL Worksheet in JDeveloper, you can issue commands to the database to customize and extend it. When making changes to the database, you can add and modify tables or columns to support the customizations and extensions you want to implement in the application (such as, adding an attribute to an entity object). However, do not remove tables or columns, as this can have adverse affects in other parts of the application.

Also, when adding tables or columns to the database, prefix the name of the table or column with a unique identifier (for example, `xx_`) to prevent collisions with existing tables and columns.

To access the SQL Worksheet, right-click the database connection (under the **Connections** node in the Application Resources panel of the Application Navigator), and choose **Database Navigator** from the context menu. This will open the selected database connection in the Database Navigator and display the SQL Worksheet.

### Task: Edit Attributes

You can customize the properties of an attribute from an entity object or view object using JDeveloper. When you open an entity object or view object in the overview editor, you click the Attributes tab to see the attributes of the object. When you select an attribute, its properties are displayed in the Property Inspector.

It is not necessary to modify the page after customizing the properties of an existing attribute. Customizations to existing attributes are automatically reflected on the pages that show them.

However, if you modify an attribute so that it requires a different UI component, you must also update the page. For example, if you add a list of values (LOV) to an attribute, you will need to edit the page to hide the existing UI component that displays the attribute, and add a new UI component that can display the LOV.

Note that some attribute properties defined in the entity object can be overridden in the view object. For example, you can define the label text for a field in an entity object and subsequently give it a different label in the consuming view object. Then pages that use the view object display the label from the view object.

For more information about attributes in entity objects, see the "Creating a Business Domain Layer Using Entity Objects" chapter in the *Oracle Fusion Middleware Fusion Developer's Guide for Oracle Application Development Framework*.

#### **Task: Add Attributes**

You can add custom attributes to an entity object or view object using JDeveloper. To do this, you must launch JDeveloper in the **Oracle Fusion Applications Administrator Customization** role, and select the global layer. When you open an entity object or view object in the overview editor, you click the Attributes tab to see the attributes of the object. To add a custom attribute, click the **Add** icon.

If you want your custom attribute to be stored in the database, you must first create the column that will be used to store it.

If you want your custom attributes to be displayed in the application, you must also customize the pages to display them. For more information, see [Section 11.4, "Editing Pages."](#)

For more information about attributes in entity objects, see the "Creating a Business Domain Layer Using Entity Objects" chapter in the *Oracle Fusion Middleware Fusion Developer's Guide for Oracle Application Development Framework*.

#### **Task: Edit Entity Objects**

In JDeveloper, you edit entity objects using the overview editor. In the Application Navigator, right-click an entity object, and choose **Open**. Then click on the navigator tabs to view and edit the various features of the entity object.

For more information about entity objects, see the "Creating a Business Domain Layer Using Entity Objects" chapter in the *Oracle Fusion Middleware Fusion Developer's Guide for Oracle Application Development Framework*.

For more information about using entity objects in Fusion applications, see the "Getting Started with Business Services" chapter in the *Oracle Fusion Applications Developer's Guide*.

#### **Task: Edit View Objects**

In JDeveloper, you edit view objects using the overview editor. In the Application Navigator, right-click a view object, and choose **Open**. Then click on the navigator tabs to view and edit the various features of the view object.

For more information about view objects, see the "Defining SQL Queries Using View Objects" chapter in the *Oracle Fusion Middleware Fusion Developer's Guide for Oracle Application Development Framework*.

For more information about using view objects in Fusion applications, see the "Getting Started with Business Services" chapter in the *Oracle Fusion Applications Developer's Guide*.

#### **Task: Edit Validation**

In JDeveloper, you edit declarative validation rules for entity objects and view objects using the overview editor. In the Application Navigator, right-click an entity object or view object, and choose **Open**. Then click the Business Rules navigator tab to view and edit the validation rules.

When implementing customizations on validation rules, you can add rules, modify the error message, and make rules more restrictive. But you should avoid removing rules or making rules less restrictive, because this can cause unpredictable results. Also, you

can edit only declarative validation rules; programmatic validation rules cannot be customized.

For more information, see the "Defining Validation and Business Rules Declaratively" chapter in the *Oracle Fusion Middleware Fusion Developer's Guide for Oracle Application Development Framework*.

#### **Task: Edit Application Modules**

In JDeveloper, you edit application modules using the overview editor. In the Application Navigator, right-click an application module, and choose **Open**.

In JDeveloper, you can make the following kinds of customizations on an application module:

- Add new custom properties. This is done on the General page of the overview editor.
- Add new view object and application module instances. This is done on the Data Model page of the overview editor.
- Add newly created subtype view objects. This is done on the Data Model page of the overview editor.
- Add new application module configurations. This is done on the Configurations page of the overview editor.

It is important to note that you cannot modify the web service interface for a service-enabled application module. You can, for example, add an attribute in a view object that is included in a service-enabled application module, but that attribute cannot be added to the web service interface.

For more information about working with application modules, see the "Implementing Business Services with Application Modules" chapter in the *Oracle Fusion Middleware Fusion Developer's Guide for Oracle Application Development Framework*.

#### **Task: Add Customizations to Existing Reports**

After you have implemented customizations on your application, you can use Oracle Business Intelligence Publisher to include these customizations in your reports. For more information, see [Chapter 8, "Customizing Reports and Analytics."](#)

## **11.3 Editing Task Flows**

You can use JDeveloper to implement customizations on the task flows that are used in your application. A task flow is a set of ADF Controller activities, control flow rules, and managed beans that interact to allow a user to complete a task. Although conceptually similar, a task flow is not the same as a human task, a task in the worklist, or a process flow.

A bounded task flow can be rendered in a JSF page or page fragment (.jsff) by using an ADF region. This is typically done to allow reuse of the task flow, as necessary, throughout the application. If you modify a bounded task flow, the changes apply to any ADF region that uses the task flow. For more information, see the "Using Task Flows as Regions" chapter in the *Oracle Fusion Middleware Fusion Developer's Guide for Oracle Application Development Framework*.

#### **Before You Begin**

Before you start editing task flows, you'll need to determine which task flows you want to customize, and create an application customization workspace. For more

information, see [Section 11.1.1, "Before You Begin Customizing Oracle ADF Application Artifacts."](#)

When editing a task flow in JDeveloper, you must launch JDeveloper in the **Oracle Fusion Applications Administrator Customization** role.

#### **Task: Edit Task Flows**

In JDeveloper, you use the task flow diagram editor to implement customizations on existing task flows. In the Application Navigator, right-click the task flow you want to customize, and choose **Open**. The page is displayed in the diagram editor, where you can make changes to the existing activities and control flow cases, or create new custom ones. For more information, see the "Getting Started with ADF Task Flows" chapter in the *Oracle Fusion Middleware Fusion Developer's Guide for Oracle Application Development Framework*.

## **11.4 Editing Pages**

You can use JDeveloper to implement customizations on the pages that are used in your application. When editing a page in JDeveloper, you must launch JDeveloper in the **Oracle Fusion Applications Administrator Customization** role.

#### **Before You Begin**

Before you start editing pages, you'll need to determine which pages you want to customize, and create an application customization workspace. For more information, see [Section 11.1.1, "Before You Begin Customizing Oracle ADF Application Artifacts."](#)

#### **Task: Edit Pages**

In JDeveloper, you use the visual editor to implement customizations on existing pages. In the Application Navigator, right-click the page you want to customize, and choose **Open**. The page is displayed in the visual editor (accessed by clicking the **Design** tab). Then you can edit the page as you typically would using this editor. For more information about editing pages in JDeveloper, see the *Oracle Fusion Middleware Web User Interface Developer's Guide for Oracle Application Development Framework*.

## **11.5 Creating Custom Business Components**

You can use JDeveloper to extend your application by creating custom business components. When creating custom business components in JDeveloper, you must launch JDeveloper in the **Oracle Fusion Applications Developer** role. This role is used for creating new custom objects that you want to add to the application. You can use the same workspace that you created for customization. Then after you have created the custom business components, you switch to the **Oracle Fusion Applications Administrator Customization** role, to make changes to existing artifacts to integrate the new custom artifacts into the application.

#### **Before You Begin**

Before you start creating business objects, you'll need to determine which business objects you want to create, and create an application customization workspace. For more information, see [Section 11.1.1, "Before You Begin Customizing Oracle ADF Application Artifacts."](#)

### Task: Create Custom Database Tables

Using the SQL Worksheet in JDeveloper, you can issue commands to the database to customize and extend it. When making changes to the database, you can add and modify tables or columns to support the customizations and extensions you want to implement in the application (such as, adding an entity object). However, do not remove tables or columns, as this can have adverse affects in other parts of the application.

Also, when adding tables or columns to the database, prefix the name of the table or column with a unique identifier (for example, xx\_) to prevent collisions with existing tables and columns.

You can use the tool of your choice to create database objects in the Oracle Fusion Applications schema. For example, in JDeveloper you can use the Database Navigator to model database objects, and the SQL Worksheet to issue SQL statements.

To access the SQL Worksheet, right-click the database connection (under the **Connections** node in the Application Resources panel of the Application Navigator), and choose **Database Navigator** from the context menu. This will open the selected database connection in the Database Navigator and display the SQL Worksheet. For information about creating database objects in JDeveloper, see the *Oracle Fusion Middleware User Guide for Oracle JDeveloper*.

### Task: Create Custom Entity Objects

An entity object represents a row in a database table, and encapsulates the business logic and database storage details of your business entities.

In JDeveloper, you can create entity objects using the Create Entity Object wizard, which you can launch from the New Gallery. In the Application Navigator, right-click the project you want to add the entity object to, and choose **New**. Then in the New Gallery, expand **Business Tier**, click **ADF Business Components**, choose **Entity Object**, and click **OK**. Follow the prompts in the wizard to create an entity object.

For more information about creating entity objects, see the "Creating a Business Domain Layer Using Entity Objects" chapter in the *Oracle Fusion Middleware Fusion Developer's Guide for Oracle Application Development Framework*.

For more information about using entity objects and view objects in Fusion applications, see the "Getting Started with Business Services" chapter in the *Oracle Fusion Applications Developer's Guide*.

### Task: Create Custom View Objects

A view object represents a SQL query and also collaborates with entity objects to consistently validate and save the changes when end users modify data in the UI.

In JDeveloper, you can create view objects using the Create View Object wizard, which you can launch from the New Gallery. In the Application Navigator, right-click the project you want to add the view object to, and choose **New**. Then in the New Gallery, expand **Business Tier**, click **ADF Business Components**, choose **View Object**, and click **OK**. Follow the prompts in the wizard to create a view object.

For more information about creating view objects, see the "Defining SQL Queries Using View Objects" chapter in the *Oracle Fusion Middleware Fusion Developer's Guide for Oracle Application Development Framework*.

For more information about using entity objects and view objects in Fusion applications, see the "Getting Started with Business Services" chapter in the *Oracle Fusion Applications Developer's Guide*.

### Task: Create Custom Application Modules

An application module encapsulates an active data model and the business functions for a logical unit of work related to an end-user task.

In JDeveloper, you can create application modules using the Create Application Module wizard, which you can launch from the New Gallery. In the Application Navigator, right-click the project you want to add the application module to, and choose **New**. Then in the New Gallery, expand **Business Tier**, click **ADF Business Components**, choose **Application Module**, and click **OK**. Follow the prompts in the wizard to create an application module.

For more information about creating application modules, see the "Implementing Business Services with Application Modules" chapter in the *Oracle Fusion Middleware Fusion Developer's Guide for Oracle Application Development Framework*.

For more information about using application modules in Fusion applications, see the "Getting Started with Business Services" chapter in the *Oracle Fusion Applications Developer's Guide*.

### Task: Create a Web Service Interface for a Custom Application Module

In JDeveloper, you can edit a custom application module to create a web service interface that exposes the top-level view objects and defines the available service operations it supports. To do this, open the application module in the overview editor, click the **Service Interface** navigation tab, and click the **Enable support for Service Interface** icon. Then use the Create Service Interface wizard to configure the desired options.

It is important to note that the new web service cannot be deployed to the Fusion application. You can deploy it only to a new application.

For more information about creating a web service interface for an application module, see the "Integrating Service-Enabled Application Modules" chapter in the *Oracle Fusion Middleware Fusion Developer's Guide for Oracle Application Development Framework*.

For more information about using application modules in Fusion applications, see the "Getting Started with Business Services" chapter in the *Oracle Fusion Applications Developer's Guide*.

### Task: Add Validation

In JDeveloper, you can create declarative validation rules for entity objects and view objects to help ensure the integrity of the data. To do this, open the entity object or view object in the overview editor, and click the **Business Rules** navigation tab. Then select the attribute you want to provide validation for, click the **Create new validator** icon, and use the Add Validation Rule dialog to configure the rule. For more information, see the "Defining Validation and Business Rules Declaratively" chapter in the *Oracle Fusion Middleware Fusion Developer's Guide for Oracle Application Development Framework*.

### Task: Enforce Data Security for a Custom Business Object

You can use JDeveloper to enforce row and attribute security for custom ADF Business Components objects. This is done using data security policies to secure data from business objects based on the grants made to roles.

When you need to expose data records in an extended application, you can use JDeveloper to create entity objects based on secured database resources, and then opt into data security policies by enabling row-level privilege checking for specific operations on the entity objects. For more information, see [Section 15.5, "Enforcing Data Security in the Data Model Project."](#)

**Task: Add a Business Object to an Existing Report**

After you have extended your application with custom business objects, you can use Oracle Business Intelligence Publisher to include these extensions in your reports. For more information, see [Chapter 8, "Customizing Reports and Analytics."](#)

## 11.6 Creating Custom Task Flows

You can use JDeveloper to create custom task flows that you can include in your application. A task flow is a set of ADF Controller activities, control flow rules, and managed beans that interact to allow a user to complete a task. Although conceptually similar, a task flow is not the same as a human task, a task in the worklist, or a process flow.

**Before You Begin**

Before you start creating custom task flows, you'll need to determine which task flows you want to create, and create an application customization workspace. For more information, see [Section 11.1.1, "Before You Begin Customizing Oracle ADF Application Artifacts."](#)

When extending your application with custom task flows in JDeveloper, you must launch JDeveloper in the **Oracle Fusion Applications Developer** role.

**Task: Create a Custom Task Flow**

You can create a custom task flow in JDeveloper using the New Gallery, and then define its activities using the task flow diagram editor. In the Application Navigator, right-click the project you want to add the task flow to, and choose **New**. Then in the New Gallery, expand **Web Tier**, and click **JSF/Facelets**. Then select **ADF Task Flow**, and click **OK**. In the Create Task Flow dialog, you'll specify the details about the type of task flow you want to create. When you click **OK**, the task flow is created and displayed in the diagram editor.

For information about creating and designing task flows, see the "Getting Started with ADF Task Flows" chapter in the *Oracle Fusion Middleware Fusion Developer's Guide for Oracle Application Development Framework*

## 11.7 Creating Custom Pages

You can use JDeveloper to create custom pages that you can include in your application. When creating custom pages in JDeveloper, you must launch JDeveloper in the **Oracle Fusion Applications Developer** role.

When creating the page (or dropping a view activity onto a task flow), you can create the page either as a JSF JSP or as a JSF JSP fragment. JSF fragments provide a simple way to create reusable page content in a project, and are what you use when you want to use task flows as regions on a page. When you modify a JSF page fragment, the JSF pages that consume the page fragment are automatically updated.

After extending your application with custom pages, you will need to make sure that security for the new pages is implemented appropriately and that the new pages are deployed so that they are accessible from the application. For more information about updating security, see [Chapter 15, "Customizing Security for ADF Application Artifacts."](#) For more information about deployment, see [Section 11.11, "Deploying ADF Customizations and Extensions."](#)

For more information about creating pages in JDeveloper, see the following resources:

- The *Oracle Fusion Middleware Web User Interface Developer's Guide for Oracle Application Development Framework*
- "Getting Started with Your Web Interface" in the *Oracle Fusion Middleware Fusion Developer's Guide for Oracle Application Development Framework*
- "Implementing UIs in JDeveloper with Application Tables, Trees and Tree Tables" in the *Oracle Fusion Applications Developer's Guide*
- "Implementing Applications Panels, Master-Detail, Hover, and Dialog Details" in the *Oracle Fusion Applications Developer's Guide*
- "Creating Customizable Applications" in the *Oracle Fusion Applications Developer's Guide*

### Before You Begin

Before you start creating custom pages, you'll need to determine which pages you want to create, and create an application customization workspace. For more information, see [Section 11.1.1, "Before You Begin Customizing Oracle ADF Application Artifacts."](#)

When creating custom pages in JDeveloper, you must launch JDeveloper in the **Oracle Fusion Applications Developer** role.

#### Task: Create a Custom Page

In JDeveloper, you can create pages either by double-clicking a view activity in a task flow or by using the New Gallery. In the Application Navigator, right-click the project you want to add the page to, and choose **New**. Then in the New Gallery, expand **Web Tier**, and click **JSF/Facelets**. Then select either **Page** or **ADF Page Fragment**, and click **OK**.

#### Task: Add a Custom Page to a Task Flow

If you created the page by double-clicking a view activity in a task flow, it is already added to the task flow. If you created it using the New Gallery, you can add it to a task flow by dragging the page from the Application Navigator and dropping it in the task flow diagram editor. Then you can connect the page using a control flow. For more information, see the "Getting Started with ADF Task Flows" chapter in the *Oracle Fusion Middleware Fusion Developer's Guide for Oracle Application Development Framework*.

#### Task: Enable Runtime Customization for a Custom Page

To enable a custom page to be customized at runtime, you must make sure that the page and the project that contains it are set to allow runtime customizations. For information on how to do this, see the "Authorizing Runtime Customization of Pages and Task Flows" section in the *Oracle Fusion Applications Developer's Guide*.

## 11.8 Customizing or Creating a Custom Search Object

In JDeveloper, you can customize and create saved searches and search forms for your application. To customize a search form or saved search in JDeveloper, you'll need to set up an application workspace as described in [Section 10.2.1, "Creating the Customization Application Workspace."](#) Then, locate and open the object you want to customize. To create a new search form, you open or create the page that will display the form and select a data collection from the Data Controls panel. For more information, see the "Creating ADF Databound Search Forms" chapter in the *Oracle*

*Fusion Middleware Fusion Developer's Guide for Oracle Application Development Framework.*

## 11.9 Editing the UI Shell Template

For CRM applications, you can use Oracle Composer to edit the UI shell template, as described in [Section 3.4, "Editing the UI Shell Template Used by All Pages."](#) For other Oracle Fusion Applications, you will need to use JDeveloper.

To edit the UI Shell template in JDeveloper, you'll need to set up an application workspace as described in [Section 10.2.1, "Creating the Customization Application Workspace."](#) Then, in the **Oracle Fusion Applications Administrator Customization** role, expand the contents of the **Applications Core (ViewController)** library and drill down to the file **oracle/apps/fnd/appcore/templates/UIShelljspx**. This is the UI Shell templates, which you can customize as necessary.

## 11.10 Customizing or Adding Resource Bundles

One method of customizing text is defining a new key in the resource bundle. There is a single override resource bundle for Oracle Fusion Applications. You can use this resource bundle to override values for existing keys, but you cannot add new keys.

Because you cannot define a new key in the shipped resource bundle, you need to create a new override bundle. You can accomplish this in JDeveloper by creating an XLIFF file from the New Gallery. After the file is generated, you can then enter new keys and their associated text in the XLIFF file.

To make the newly created resource bundle available for customization, you need to register the resource bundle with the customization project. You can do this from the Resource Bundle page of the Project Properties dialog.

You can also extend your application by creating a new resource bundle for a project if, for example, you want to customize the text for a label and you don't want to change the value in the global override bundle. To do this, create an XLIFF file from the New Gallery, package it into an ADF Library JAR file, and import the JAR file into the customization project.

---

**Note:** All custom JAR file names must begin with the prefix Xx, for example XxMyJar.jar

---

To test your customizations locally in the JDeveloper integrated WebLogic Server, you must also include the ADF Library JAR file in the APP-INF/lib directory.

For information about translating custom resource bundle strings, see [Section 16.2, "Translating Resource Bundles from Metadata Services Metadata Repository."](#)

For more information about working with resource bundles, see the "Creating a Business Domain Layer Using Entity Objects" chapter in the *Oracle Fusion Middleware Fusion Developer's Guide for Oracle Application Development Framework*.

## 11.11 Deploying ADF Customizations and Extensions

After you have customized existing artifacts, you can use JDeveloper to deploy the customizations to a sandbox or to the Fusion application. For more information on how to use sandboxes to isolate changes from the mainline so you can test and validate the changes, see [Section 2.2.2, "Setting Up Sandboxes."](#)

When you create a customization workspace as described in [Section 10.2.1, "Creating the Customization Application Workspace,"](#) the wizard generates a MAR profile. By default, the name of the MAR profile is *application\_name\_customizations*. It will automatically include the customizations that you implement. You can use this profile to package your customizations for deployment.

When you package customizations from the customization workspace, the MAR file should include only library customizations. Make sure that the MAR profile does not include the **User Metadata** or **HTML Root Dir for Project**.

If you extend your application with new custom artifacts, you can use JDeveloper to package them into an ADF Library JAR and place them into the proper location within the application directory structure.

### **Task: Deploy the Customizations**

You can use JDeveloper to directly deploy the customizations directly or you can use JDeveloper to create a MAR, and then load the MAR using WLST commands or the WebLogic Server Administration Console. If you are using JDeveloper to deploy directly, you have a choice to deploy to available sandboxes or into the already deployed Fusion application.

When you deploy customizations on ADF Business Component objects (such as entity objects and view objects), the server must be restarted for the customizations to be picked up.

For instructions on deploying customizations, see the section on "How to Deploy New Customizations Applied to ADF Library" in the *Oracle Fusion Middleware Fusion Developer's Guide for Oracle Application Development Framework*.

### **Task: Package New Artifacts into ADF Library**

If you have extended your application with new custom artifacts (or you are supplied with new artifacts), you must package these artifacts into an ADF library JAR and place the JAR files in the proper location within the application.

---

**Note:** All custom JAR file must begin with the prefix Xx, for example  
XxMyJar.jar

---

The ADF library JAR for the new model artifacts (such as entity objects and view objects) should be placed into the *ExplodedEarDirectory/APP-INF/lib* directory. The ADF Library JAR for the new user interface artifacts (such as pages) should be placed in the *ExplodedWarDirectory/WEB-INF/lib* directory.

For instructions on creating ADF Library, see the section on "Packaging a Reusable ADF Component into an ADF Library" in the *Oracle Fusion Middleware Fusion Developer's Guide for Oracle Application Development Framework*.

# 12

---

## Customizing and Extending SOA Components

This chapter describes how to customize (edit) service-oriented architecture (SOA) components during runtime in a deployed composite with a runtime tool or customize and extend (create) SOA components during design time in JDeveloper.

This chapter includes the following sections:

- [Section 12.1, "About Customizing and Extending SOA Components"](#)
- [Section 12.2, "Customizing SOA Composites"](#)
- [Section 12.3, "Merging Runtime Customizations from a Previously Deployed Revision into a New Revision"](#)
- [Section 12.4, "Extending or Customizing Custom SOA Composites"](#)
- [Section 12.5, "Deploying SOA Composite Customizations and Extensions"](#)

For information about troubleshooting SOA issues, see Chapter "Troubleshooting Oracle SOA Suite" of the *Oracle Fusion Applications Administrator's Guide*.

---

### Notes:

- This chapter does not describe customizing and extending Oracle BPM Suite. Oracle BPM Suite is installed on top of Oracle SOA Suite, and provides the ability to run Business Process Management Notation (BPMN) processes. To accomplish this task, there are extensions to JDeveloper for working with BPMN (Oracle BPM Studio) and a web-based application for working with BPMN processes (Oracle Business Process Composer). For information about BPMN process flows, see [Chapter 7, "Customizing and Extending BPMN Processes."](#) For information about Oracle BPM project templates, see [Chapter 13, "Customizing and Extending Oracle BPM Project Templates."](#)
- Oracle SOA Suite extensions cannot be used with the Integrated WLS. If an application has references to Oracle SOA Suite shared libraries, then customizations on the application cannot be tested with the Integrated WLS.

---

### 12.1 About Customizing and Extending SOA Components

SOA provides an enterprise architecture that supports building connected enterprise applications to provide solutions to business problems. SOA enables you to develop

enterprise applications as modular business web services that can be integrated and reused, resulting in a flexible, adaptable IT infrastructure. SOA separates business functions into distinct units, or services.

Oracle SOA Suite provides a complete set of service infrastructure components for designing, deploying, and managing composites. A composite is an assembly of services, service components, and references designed and deployed in a single application. Wiring between the services, service components, and references enables message communication.

Oracle SOA Suite consists of SOA components that comprise the business logic and processing rules in a SOA composite. You can include components such as the following in a SOA composite:

- Business rules:

The following categories of rules are available:

- Approval configuration (expirations, escalations, and notifications) and assignment rules:

Define complex task routing slips for approval management by taking into account business documents and associated rules to determine the approval hierarchy for a work item. Additionally, approval management lets you define multistage approvals with associated list builders based on supervisor or position hierarchies. You can also define expiration, escalation, and notification configurations. For example, an expense approval task may use rules to define its approvers.

Approval configuration and assignment rules are within the context of a human workflow.

- Nonapproval business rules:

Define a business decision based on rules that enables dynamic decisions to be made at runtime that automate policies, computations, and reasoning while separating rule logic from underlying application code. For example, you can define a business rule to select a supplier with the lowest shipping price to fulfill a shipping order.

Nonapproval business rules are in the context of Oracle SOA Suite, but outside of human workflow.

- Rules in non-Oracle SOA Suite applications

Use of standalone rules in non-Oracle SOA Suite applications is supported. You can completely control how the rule dictionaries are structured and how these applications are patched. You may structure the rules as recommended for Oracle SOA Suite rules, as described in this chapter.

- Domain value maps:

Operate on actual data values that move through the infrastructure at runtime. Domain value maps enable you to map from one vocabulary used in a given domain to another vocabulary used in a different domain. For example, one domain can represent a city with a long name (Boston), while another domain can represent a city with a short name (BO). In such cases, you can directly map the values by using domain value maps.

- Human tasks:

Extend a workflow that describes the tasks for users or groups to perform as part of an end-to-end business process flow. For example, a vacation request workflow

is assigned to a manager. The manager must act on the request task three days before the vacation starts. If the manager formally approves or rejects the request, the employee is notified with the decision. If the manager does not act on the task, the request is treated as rejected. Notification actions similar to the formal rejection are taken.

- **BPEL processes:**

Integrate a series of business activities and services into an end-to-end process flow. For example, a BPEL process flow calls a credit rating service. When you run this process, you enter a social security number into a user interface. The credit rating service takes the number and returns a credit rating.

- **Oracle Mediators:**

Define services that perform message and event routing, filtering, and transformations. For example, Oracle Mediator can accept data contained in a text file from an application or service, transform it into a format appropriate for updating a database that serves as a customer repository, and then route and deliver the data to that database.

For more information about these components, see *Oracle Fusion Middleware Developer's Guide for Oracle SOA Suite*.

Oracle SOA Suite supports the following types of customizations and extensions of these components:

- Customizing several components during runtime
- Customizing and extending several components during design time

The tool to use depends on the component you are customizing or extending and whether you are performing these tasks during runtime or design time. [Table 12–1](#) provides details.

---

**Note:** If you are customizing approval configuration and assignment rules or nonapproval business rules for a *deployed* project (either for Oracle SOA Suite or Oracle BPM Suite), always use Oracle BPM Worklist or Oracle SOA Composer. If you are customizing approval configuration and assignment rules or nonapproval business rules as part of a *new* Oracle BPM Suite project being extended in Oracle Business Process Composer, then use Oracle Business Process Composer. For information about using Oracle Business Process Composer, see [Chapter 13, "Customizing and Extending Oracle BPM Project Templates."](#)

---

**Table 12–1 Customization and Extension Tools for Oracle SOA Suite**

To Perform These Tasks...	Use This Tool...	Use This Tool At...	Tool User
Customize business rules:			
<ul style="list-style-type: none"> <li>■ Approval configuration and assignment rules</li> <li>■ Nonapproval business rules</li> </ul>	<ul style="list-style-type: none"> <li>■ Oracle BPM Worklist (recommended) or Oracle SOA Composer</li> <li>■ Oracle SOA Composer</li> </ul> <p><b>Note:</b> If you use Oracle SOA Composer to customize approval configuration and assignment rules during runtime, changes in subsequent revision patches are <i>not</i> applied successfully.</p>	Runtime in a deployed composite  Runtime in a deployed composite	Technical analyst  Business analyst

**Table 12–1 (Cont.) Customization and Extension Tools for Oracle SOA Suite**

To Perform These Tasks...	Use This Tool...	Use This Tool At...	Tool User
Customize domain value maps	Oracle SOA Composer	Runtime in a deployed composite	Business analyst
Customize composite endpoint properties such as the following:	Oracle Enterprise Manager Fusion Applications Control	Runtime in a deployed composite	System administrator
<ul style="list-style-type: none"> <li>▪ Attached Oracle Web Services Manager (OWSM) security policies</li> <li>▪ Service and reference binding component properties</li> <li>▪ Customize or extend business rules</li> <li>▪ Customize or extend BPEL processes</li> <li>▪ Customize or extend human tasks</li> <li>▪ Customize or extend Oracle Mediators</li> <li>▪ Customize composite components such as binding components and wires</li> <li>▪ Extend or customize transformations</li> <li>▪ Extend WSDLs or XSDs</li> <li>▪ Extend business rules</li> <li>▪ Extend JCA adapters</li> </ul>	JDeveloper (when logged in with the <b>Customization Developer</b> role)	Design time (when complete, you must deploy the composite)	System integrator

**Notes:**

- You *cannot* customize human tasks, BPEL processes, and Oracle Mediators during runtime in a deployed composite.
- When using Oracle SOA Composer, you can save your customizations in a sandbox environment without applying them to a running instance and later return to the sandbox to make additional customizations. These customizations are only applied to the running instance when you click **Commit**.

### 12.1.1 Before You Begin Customizing SOA Composites

Before you customize SOA components, you should be familiar with the Oracle Fusion application architecture that enables customizations, as described in [Chapter 1, "Customizing and Extending Oracle Fusion Applications."](#) You should also understand the typical workflows for working with runtime customizations, as described in [Chapter 2, "Understanding the Customization Development Lifecycle."](#)

In addition, you will need to perform the following tasks before you can begin customizing your application:

- Install JDeveloper and set up your development environment.

For more information, see Chapter "Setting Up Your Development Environment" of the *Oracle Fusion Applications Developer's Guide*.

- For customizations (changes to existing Oracle Fusion application artifacts), extend a customization application workspace.  
For more information, see [Chapter 10, "Using JDeveloper for Customizations."](#)
- Launch JDeveloper in the appropriate role.  
For more information, see [Chapter 10, "Using JDeveloper for Customizations."](#)

## 12.2 Customizing SOA Composites

As described in [Table 12–1](#), you can customize SOA components during runtime in a deployed composite with a runtime tool. This section provides an overview of these tasks and provides references to additional documentation for more specific instructions.

---

**Note:** You cannot customize SOA components in CRM Application Composer. However, you can extend a business event in CRM Application Composer and use the **Event notification** action to notify a SOA composite by email of the occurrence of the event. For information about extending events in CRM Application Composer, see [Section 4.2, "Editing Objects."](#)

---

### Task: Launch the Runtime Customization Tool

Use a web browser to launch the tools shown in [Table 12–2](#) for customizing approval configuration and assignment rules, nonapproval business rules, domain value maps, and composite endpoint properties at runtime:

**Table 12–2 Launching the Customization Tool**

For Customizing...	Launch...	By Entering...
<b>Business rules</b>		
■ Approval configuration and assignment rules	■ Oracle BPM Worklist (recommended) ■ Oracle SOA Composer	<a href="http://host:port/integration/worklistapp">http://host:port/integration/worklistapp</a> <a href="http://host:port/soa/composer">http://host:port/soa/composer</a>
		<b>Note:</b> If you use Oracle SOA Composer to customize approval configuration and assignment rules during runtime, changes in subsequent revision patches are <i>not</i> applied successfully.
■ Nonapproval business rules	Oracle SOA Composer	<a href="http://host:port/soa/composer">http://host:port/soa/composer</a>
<b>Domain value maps</b>		
	Oracle SOA Composer	<a href="http://host:port/soa/composer">http://host:port/soa/composer</a>
Composite endpoint properties such as OWSM security policies and binding component properties	Oracle Enterprise Manager Fusion Applications Control	<a href="http://host:port/em">http://host:port/em</a>

### Task: Select the Data to Customize

After accessing the runtime customization tool to use, select the data to customize.

- Oracle SOA Composer:

1. From the **Open** list in Oracle SOA Composer, select the data to customize, as shown in [Figure 12–1](#).

**Figure 12–1 Open Menu of Oracle SOA Composer**



[Table 12–3](#) describes the options available for selection.

**Table 12–3 Selecting the Data to Customize**

For Customizing...	Select...
Nonapproval business rules	<b>Open Rules</b>
Domain value maps	<b>Open DVM</b>
Approval configuration and assignment rules	<b>Open Task</b> <b>Note:</b> If you use Oracle SOA Composer to customize approval configuration and assignment rules during runtime, changes in subsequent revision patches are <i>not</i> applied successfully.

- Oracle BPM Worklist:

1. In the **Administration** section, click the **Task Configuration** tab.
2. Select a specific approval configuration and assignment rule task to customize. The **Event Driven** and **Data Driven** tabs are now accessible.
3. Select a task to view or customize from the list of task types.

- Oracle Enterprise Manager Fusion Applications Control:

1. In the navigation pane in Oracle Enterprise Manager Fusion Applications Control, expand the **SOA** folder.
2. Expand **soa-infra**.
3. Expand the partition in which the SOA composites are deployed (for example, **default**).
4. Select the SOA composite to customize.

### Task: Customize Business Rules

Two categories of rules are available:

- Approval configuration and assignment rules:

You can customize approval configuration and assignment rules included in a deployed composite in Oracle BPM Worklist (recommended), as shown in [Figure 12–2](#), or in Oracle SOA Composer, as shown in [Figure 12–3](#).

For more information, see the following:

- Section "Using Approval Management Features of the Oracle BPM Worklist and Workspace" of *Oracle Fusion Middleware Modeling and Implementation Guide for Oracle Business Process Management* (for Oracle BPM Worklist)
- Section "Working with Tasks at Run Time" of *Oracle Fusion Middleware User's Guide for Oracle Business Rules* (for Oracle SOA Composer)

**Figure 12–2 Approval Configuration and Assignment Rule Customizations in Oracle BPM Worklist**

The screenshot shows the Oracle BPM Worklist interface. The top navigation bar includes links for Administration, Evidence Search, Approval Groups, Task Configuration, Home, Administration, Reports, Preferences, Help, and Log. The current view is under the Task Configuration tab, specifically the Event Driven section.

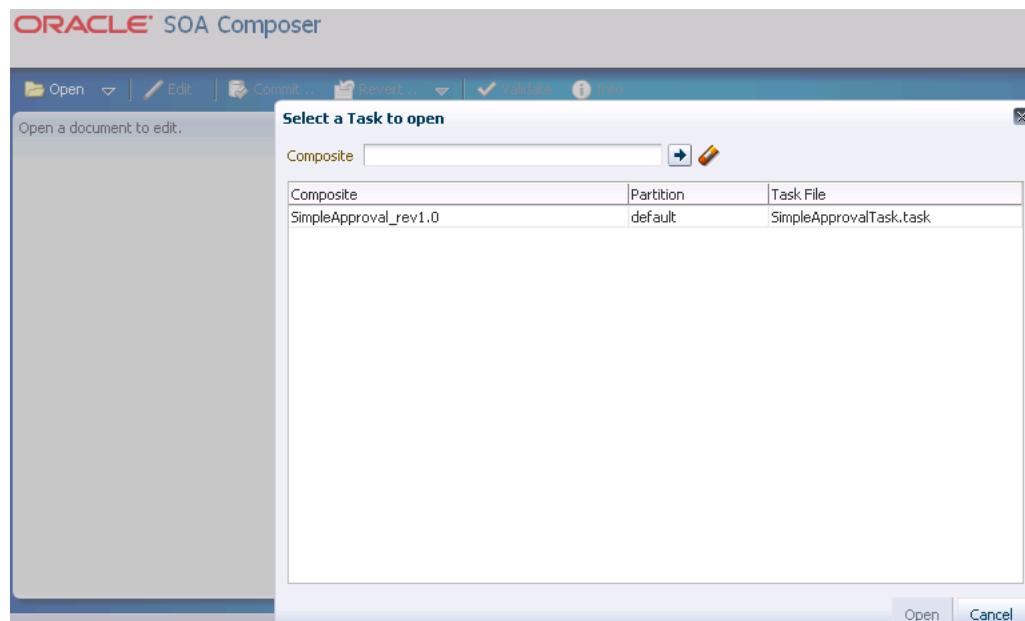
In the left sidebar, there is a list titled "Tasks to be configured" containing various approval tasks, such as FinApHoldApproval, FinApImageTransferRequestForAction, FinApInvoiceApproval, FinArTrxnsCreditMemosApproval, FinArTrxnsCreditMemosManualEntryRequestForAction, FinExmInactiveEmployeeAcceptResp, FinExmInactiveEmployeeSubmitExpensesFyi, FinExmReimToCardIssuerFyi, FinExmReimToEmpByCheckFyi, FinExmReimToEmpByDepositFyi, FinExmWorkflowExpenseApproval, FinFunEnterDistRequestForAction, FinFunTransactionApproval, and FinGJournalApproval. The "SimpleApprovalTask (1.0)" task is selected and highlighted.

The main configuration area for "SimpleApprovalTask : Event Driven Configuration" includes the following sections:

- Task Aggregation:** Set to None.
- On Error Notify:** No options shown.
- Assignment and Routing Policy:**
  - Allow all participants to invite other participants
  - Allow participants to edit future participants
  - Allow initiator to add participants
  - Enable auto claim
  - Complete task when participant chooses
  - Enable early completion of parallel subtasks
  - Complete parent tasks of early completing subtasks
- Expiration and Escalation Policy:** Set to Never Expire.
- Notification Settings:** A table defining notification recipients based on task status:
 

Task Status	Recipient	Action
Assign	Assignees	
Complete	Initiator	
Error	Owner	
- Other Options:**
  - Make notifications secure (exclude details)
  - Make notification actionable
  - Send task attachments with email notifications

**Figure 12–3 Approval Configuration and Assignment Rule Customizations in Oracle SOA Composer**



How to customize the text in notifications in Oracle BPM Worklist is determined by what you want to customize in the task detail page (the page rendered when you click the task in Oracle BPM Worklist):

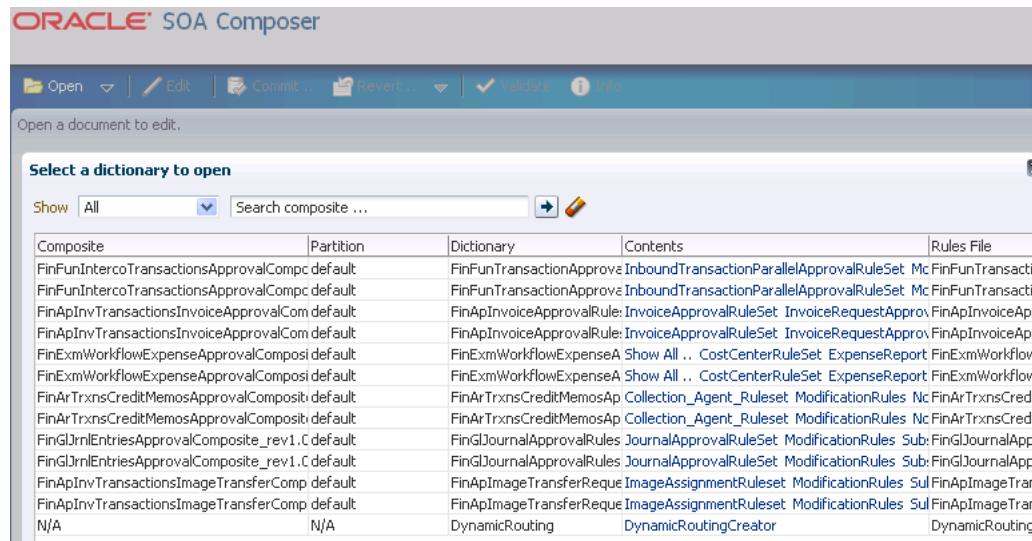
- Some strings are part of Oracle SOA Suite, other strings are part of the Oracle Fusion Applications-owned ADF resource bundle, and other strings are part of the Oracle Fusion Applications-owned SOA resource bundle.
- Task title, task outcome, approval reason, stage name, and participant type strings are stored in the Oracle Fusion Applications-owned SOA resource bundles. You *cannot* customize these because there is no support for that functionality in Oracle SOA Suite.
- Business object-specific text and sections are implemented in ADF and resource bundles are owned by Oracle Fusion Applications. These strings can only be customized in JDeveloper.
- The Oracle SOA Suite-owned strings correspond to those in the **Comments**, **Attachment**, and **History** sections in Oracle BPM Worklist. The actions along the top of the page (excluding the custom actions defined in the .task file) are also part of Oracle SOA Suite. These strings in the Oracle SOA Suite-owned resource bundles can be customized by following the instructions in *Oracle Fusion Middleware Developer's Guide for Oracle SOA Suite*.

How text appears in email notifications for human tasks is also determined by what you want to customize:

- The subject (derived from the task title) and custom outcomes are defined in the Oracle Fusion Applications-owned SOA resource bundle. You cannot customize these because there is no support for that functionality in Oracle SOA Suite.
- You can customize the notification message (the first line of instructions in the email) during runtime in Oracle BPM Worklist.

- The remaining email content is the same as customizing the text in notifications in Oracle BPM Worklist.
- Nonapproval business rules:  
You can view, customize, and commit changes to a rule dictionary included in a deployed composite in Oracle SOA Composer, as shown in [Figure 12–4](#). Supported customizations consist of the following:
  - Customizing dictionary bucketsets
  - Customizing rules in a ruleset
  - Customizing advanced rule settings
  - Customizing conditions and actions
  - Customizing advanced mode rules
  - Customizing decision tables
  - Validating rule dictionaries

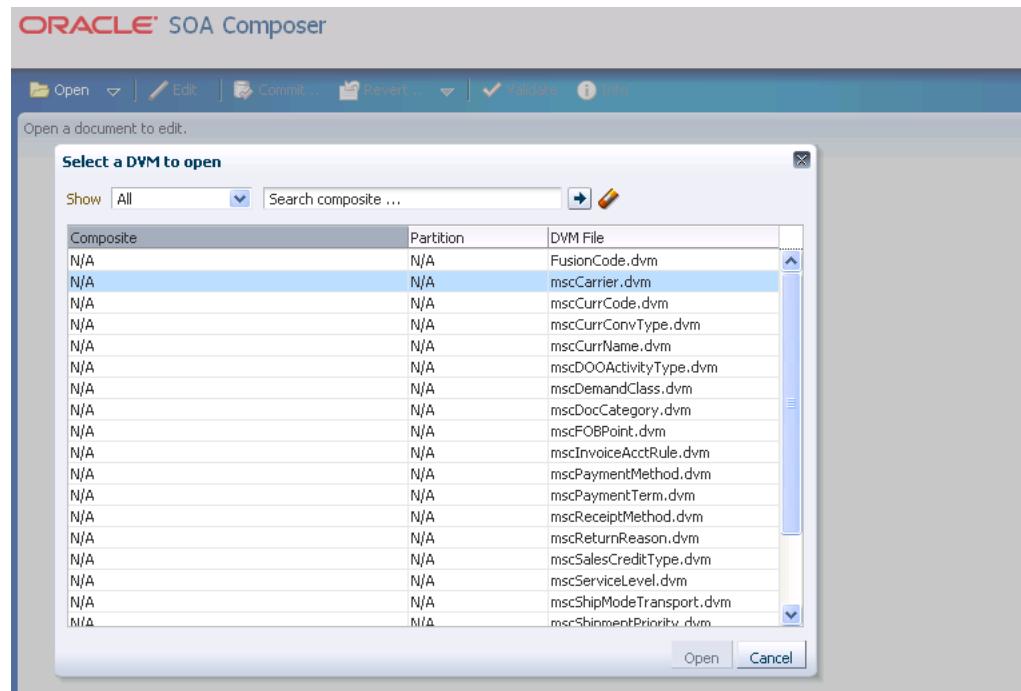
**Figure 12–4 Nonapproval Business Rule Customizations in Oracle SOA Composer**



For more information about customizing business rules in Oracle SOA Composer, see Chapter "Using Oracle SOA Composer with Oracle Business Rules" of the *Oracle Fusion Middleware User's Guide for Oracle Business Rules*.

### Task: Customize Domain Value Maps

You can customize domain value map rows included in a deployed composite in Oracle SOA Composer, as shown in [Figure 12–5](#). For more information, see Chapter "Using Oracle SOA Composer with Domain Value Maps" of the *Oracle Fusion Middleware Developer's Guide for Oracle SOA Suite*.

**Figure 12–5 Domain Value Map Customizations in Oracle SOA Composer**

### Task: Customize Composite Endpoint Properties

You can customize endpoint address properties for an external reference such as OWSM security policies and binding components included in a deployed composite in Oracle Enterprise Manager Fusion Applications Control.

Figure 12–6 provides details about customizing OWSM security policies. For more information, see Section "Managing SOA Composite Application Policies" of the *Oracle Fusion Middleware Administrator's Guide for Oracle SOA Suite and Oracle Business Process Management Suite*.

**Figure 12–6 Security Policy Customizations in Oracle Enterprise Manager Fusion Applications Control**

The screenshot shows the Oracle Enterprise Manager Fusion Applications Control interface. The left sidebar navigation includes 'Farm', 'SOA Infrastructure', 'Topology', 'Financials' (Products, Fusion Applications, Farm\_FinancialDomain, Application Deployments), and 'SOA' (soa-infra (soa\_server1) with default, AppCmmnCompActiv, FinApInvTransactions, FinApInvTransactions, FinApInvTransactions, FinArTrxnsCreditMem, FinExmWorkflow, FinExmWorkflowR, FinExmWorkflowR). The main content area is titled 'FinExmWorkflowExpenseApprovalComposite [1.0]' and shows a table of attached policies:

Policy Name	Attached To	Policy Reference Status	Category	Total Violations
oracle/wss11_saml_or_username_token_with	AddAttachmentToExpenseRepo	Disable	Security	0
oracle/wss_http_token_service_policy	ExpenseApprovalService_ep	Disable	Security	0
oracle/wss11_username_token_with_message	ExpenseApprovalBCService	Disable	Security	0
oracle/wss11_saml_token_with_message_pro	ExpenseApprovalBCService:call	Disable	Security	0
oracle/wss11_saml_token_with_message_pro	ApprovalHistoryUtilService	Disable	Security	0
oracle/wss11_saml_token_with_message_pro	ApprovalHistoryUtilService:callb	Disable	Security	0

Figure 12–7 provides details about customizing binding component properties for services and references. For more information, see Chapter "Configuring Service and Reference Binding Component Properties" of the *Oracle Fusion Middleware Administrator's Guide for Oracle SOA Suite and Oracle Business Process Management Suite*.

**Figure 12–7 Binding Component Property Customizations in Oracle Enterprise Manager Fusion Applications Control**

The screenshot shows the Oracle Enterprise Manager Fusion Applications Control interface. The left sidebar navigation is identical to Figure 12–6. The main content area is titled 'FinApInvTransactionsHoldsResolutionComposite [1.0]' and shows the 'Properties' tab for the 'HoldsApprovalService\_ep (Web Service)' component. The 'General' section contains the following properties:

REST Enabled	False
WSDL Enabled	True
Metadata Exchange Enabled	True
Endpoint Test Enabled	True
Logging Level	NULL
Schema validation	False
Atomic Transaction Version	Default
Atomic Transaction Flow Option	Never

The 'Maximum Request Size' section shows:

- Maximum Request Size: -1
- Unit of Maximum Request Size: Bytes

### Task: Synchronizing Customized Flexfields in the SOA MDS Repository

SOA composites in Oracle Fusion Applications reference copies of the original XSD schema files included in the SOA Metadata Services (MDS) repository. When you customize and deploy Oracle Fusion Applications flexfields (or upgrade the base table, after which the flexfields are automatically re-applied), which result in a new XSD being generated in the Oracle Fusion Applications MDS, the updated XSD files must be synchronized in SOA MDS for use in the fact models in business rules.

To perform this synchronization, a special SOA composite named **UpdateSOAMDS** is included with Oracle Fusion Applications. By default, the **UpdateSOAMDS** composite is automatically deployed. When a synchronization is required, you manually invoke an instance of this composite to synchronize the updated XSD files in SOA MDS. You can view the results of this synchronization in the audit trail in Oracle Enterprise Manager Fusion Applications Control.

1. Invoke the **UpdateSOAMDS** composite.
  - a. Log in to Oracle Enterprise Manager Fusion Applications Control.
  - b. In the navigation pane, expand **soa-infra** and the domain.
  - c. Select the **UpdateSOAMDS** composite.
  - d. At the top of the Dashboard page for **UpdateSOAMDS**, click **Test**.
  - e. In the **Operation** list, select the operation to perform, as shown in Figure 12–8.

**Figure 12–8 Operations to Perform**

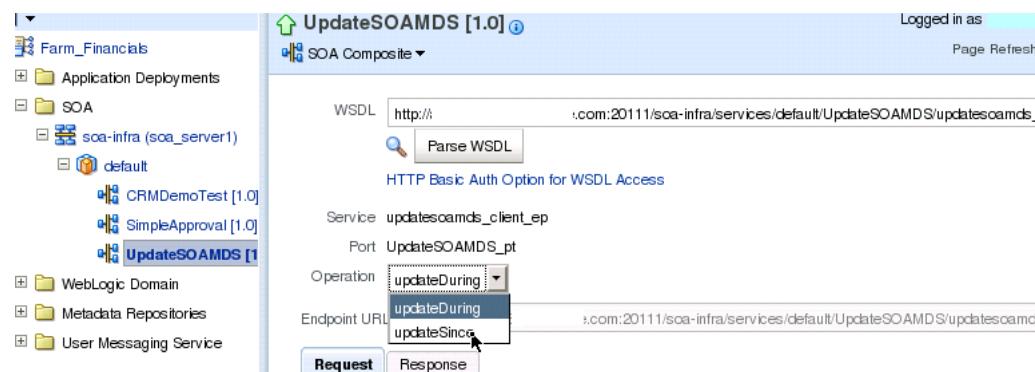


Table 12–4 describes the operations available for selection.

**Table 12–4 Operations**

Operation	Description
<b>updateDuring</b>	Select to specify how far back in time to go to get flexfield updates for synchronizing in SOA MDS.
<b>updateSince</b>	Select to specify the time from which you want to get flexfield updates for synchronizing in SOA MDS.

- f. In the **Value** field of the **Input Arguments** section, enter a value, as shown in Figure 12–9.

**Figure 12–9 Value Field**

Input Arguments		
Name	Type	Value
* payload	duration	P50D

Table 12–5 provides details about the value to specify.

**Table 12–5 Operation Values**

If You Selected...	Description
updateDuring	<p>This operation uses the xsd:duration type as input to obtain the data. For example:</p> <ul style="list-style-type: none"> <li>▪ Enter P50D to go back fifty days to get flexfield updates that occurred.</li> <li>▪ Enter P1M2DT3H to go back one month, two days, and three hours to get flexfield updates that occurred.</li> </ul>
updateSince	<p>This operation uses the xsd:dateTime type as input to obtain the data. For example, entering 2011-02-10T00:00:00 gets flexfield updates that have occurred since February 10, 2011.</p>

**g. Click Test Web Service.**

The list of XSD schema files synchronized in SOA MDS is returned as output in the **Response** tab, as shown in Figure 12–10.

**Figure 12–10 Test Output**

A new composite instance was generated.			Launch Flow Trace
Name	Type	Value	
payload	payload		
result	string	<p>Following files are synched: [/apps/fnd/appcore/crmdemo/flex/cases /CasesDFF.xsd, /apps/fnd/appcore/crmdemo/flex/cases /CasesDFFComputer.xsd, /apps/fnd/appcore/crmdemo/flex/cases /CasesDFFPaper_Mill.xsd, /apps/fnd/appcore/crmdemo/flex/cases</p>	

All rule dictionaries in SOA MDS that use the impacted XSD schemas are altered. The data model of the rule dictionaries is modified and the fact types are re-imported. After re-importing the XSD schemas, the rule dictionary is saved in SOA MDS.

The JAXB 2.0 classes for the fact type model of the rule dictionaries that have been altered are regenerated and compiled into the appropriate composite SCA-INF/gen-classes directories.

Other SOA instances in the cluster are notified of the flexfield customizations.

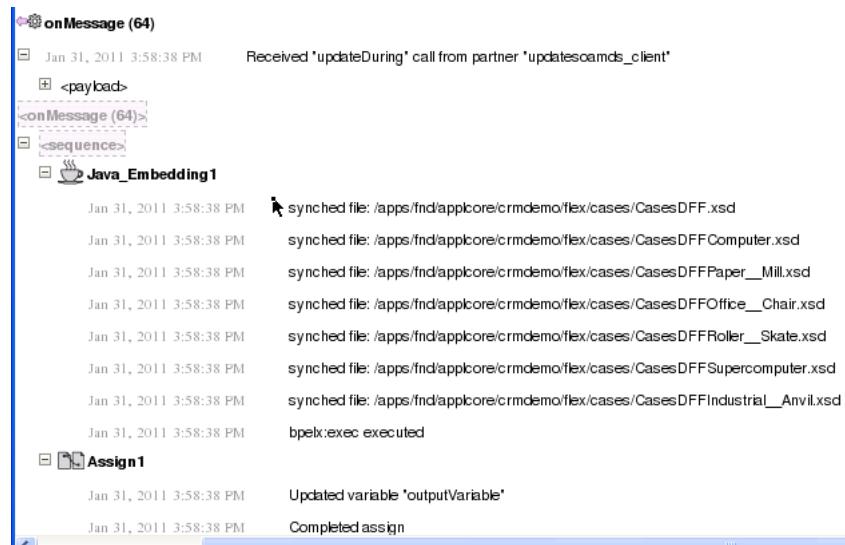
The composite class loader for the SOA composites where the rule dictionary was altered is invalidated and a new class loader is extended with the next request for the composite.

The SOA instances not involved in updating the rule dictionary in SOA MDS regenerate the JAXB 2.0 classes for the composites that comprise a rule dictionary where the fact type model was altered.

**2. View the results in the audit trail.**

**a. In the Recent Instances section of the Dashboard page, click the instance ID.**

- b.** In the **Trace** section of the Flow Trace page, click the **UpdateSOAMDS BPEL** service component.
- c.** View the list of XSD schema files synchronized in SOA MDS in the audit trail, as shown in [Figure 12–11](#).

**Figure 12–11 Audit Trail Results**


---

**Note:** In previous releases, Oracle BPM Worklist included a feature known as flex fields. Starting with Release 11g R1 (11.1.1.4), flex fields are now known as mapped attributes. Do *not* confuse Oracle BPM Worklist flex fields with Oracle Fusion Applications flexfields; they are completely different features.

---

## 12.3 Merging Runtime Customizations from a Previously Deployed Revision into a New Revision

After using a composite customized at runtime for a period of time, a new patch revision of the composite may become available. Repeating the process of customizing the new revision of the composite at runtime can be cumbersome and time-consuming. To avoid these challenges, use the OPatch tool. The OPatch tool is an Oracle-supplied, Java-based utility that enables you to merge customizations made during runtime in a previously deployed composite into a new patch revision of the composite. OPatch preserves your runtime customizations and prevents you from having to re-enter the customizations again for the next patch revision.

OPatch merges a new patch revision into a composite that was previously customized during both design time in JDeveloper and runtime in Oracle SOA Composer, Oracle BPM Worklist, or Oracle Enterprise Manager Fusion Applications Control. For specific procedures on patching SOA composites with OPatch, see *Oracle Fusion Applications Patching Guide*.

**Task: Merge Runtime Customizations from a Previously Deployed Revision into a New Revision**

Before using the OPatch tool to merge runtime customizations from a previously deployed revision into a new revision, review the recommendations in [Table 12–6](#) to ensure that you merge customizations successfully.

**Table 12–6 Recommendations on Merging Patch Revision Customizations and Extensions**

Component	Recommendation
Deletion of base components	Delete only components you added as part of the customization, and not components that are part of the base revision. This is because the deletion of base components does not survive the move to the new revision, but the deletion of the wiring does. If you delete an existing base component, it comes back again when you get the new revision, which still has the component. However, the wire deletion survives the upgrade because the composite.xml file is customizable.

**Table 12–6 (Cont.) Recommendations on Merging Patch Revision Customizations and Extensions**

Component	Recommendation
Business rules	<p>If business rules are customized at runtime, and those runtime customizations must be preserved in subsequent revisions of the base version of the composite, it is recommended that the rules dictionaries be split into two dictionaries and linked using the dictionary linking functionality.</p> <p>The base rule, linked dictionary contains the data model of the dictionary and the custom rules dictionary contains all the rules customized at runtime. The OPatch process preserves the customized dictionary when it merges the customized application with subsequent versions of the application. Business rules are used in different scenarios and the following information identifies how to handle each situation.</p> <ul style="list-style-type: none"> <li>■ Approval configuration and assignment rules           <p>These rules are used within human tasks to determine approvers and the routing of human tasks. Approval rules are always generated as base and custom dictionaries at design time. No further configuration is necessary at design time.</p> <p>Runtime customizations:</p> <p>If you must customize approval configuration and assignment rules during runtime, use only Oracle BPM Worklist to perform this task. Using Oracle BPM Worklist enables:</p> <ul style="list-style-type: none"> <li>-) Approval assignment and configuration rules to automatically be stored in a custom rules dictionary (<code>Rule.rules</code>). The custom rules dictionary is initially shipped with only sample, preseeded rules. The custom rules dictionary is separate from the base rule, linked dictionary (<code>RuleBase.rules</code>). The base rule, linked dictionary contains Oracle Fusion Applications fact definitions. Revision patches are applied to the base rule, linked dictionary.</li> <li>-) Changes in subsequent revision patches to be applied successfully to the base rule, linked dictionary.</li> </ul> <p>If you use Oracle SOA Composer to customize approval configuration and assignment rules during runtime, changes in subsequent revision patches are <i>not</i> applied successfully.</p> <p>Design time customizations:</p> <p>You cannot customize existing rules that are part of the base version of the composite at design time in JDeveloper. However, you can extend new rules that you later customize.</p> </li> <li>■ Nonapproval business rules           <p>These rules are used directly in processes like BPEL and BPMN outside of the context of a human task. These dictionaries are not generated as linked dictionaries in JDeveloper and must be manually split as linked dictionaries.</p> <p>Runtime customizations:</p> <p>If the dictionaries are split as linked dictionaries, ensure that only the linked dictionaries are customized from Oracle SOA Composer. Identification of the base rule and linked rule dictionary is up to you to develop.</p> <p>Design time customizations:</p> <p>You cannot customize existing rules that are part of the base version of the composite at design time in JDeveloper. However, you can extend new rules that you later customize.</p> </li> </ul>

**Table 12–6 (Cont.) Recommendations on Merging Patch Revision Customizations and Extensions**

Component	Recommendation
Default URLs for service binding components	Use default URLs for service binding components. If the revision is used in the URL for service binding components, when the SOA composite is patched using OPatch, the revision of the composite is customized. In this case, the reference to URLs for service binding components fails to work. In this scenario, you must manually update all the URL references for service binding components.
Oracle BPEL Process Manager scope activity	If a base composite team removes the scope activity in the next revision of the composite, when a vertical composite team or customer runs the OPatch utility to apply the new revision of the composite to their customized version, all customizations they performed on that scope activity in the first revision are lost.
Renaming of a composite whose SOA archive (SAR) file is imported in JDeveloper	When importing a SAR file for customization in JDeveloper, the composite must <i>not</i> be renamed. In addition, if you rename a composite, OPatch cannot detect runtime customizations made in Oracle SOA Composer, Oracle BPM Worklist, and Oracle Enterprise Manager Fusion Applications Control. You must manually re-apply those customizations.
Base revision of a composite with JDeveloper customizations	<p>Assume you customize the base revision of a composite with the <b>Customization Developer</b> role in JDeveloper, and then deploy the composite. When the base revision is updated and a newer revision is made available, the customer uses OPatch to apply the patch revision. OPatch may then fail because there are JDeveloper customizations in the deployed composite.</p> <p>To resolve this issue, perform the following steps:</p> <ol style="list-style-type: none"> <li>1. Open the customized composite with the <b>Default Role</b> in JDeveloper.</li> <li>2. Import the patched base version 2 SAR file into this composite project extended in <a href="#">Section 10.3, "Customizing SOA Composites with JDeveloper."</a></li> <li>3. Restart JDeveloper with the <b>Customization Developer</b> role.</li> <li>4. Open the above customized composite. Error messages are shown in case of conflicts.</li> <li>5. Resolve the conflicts in the composite.</li> <li>6. Deploy the composite to the SAR file. The new SAR file should be replaced by the patched base version 2 SAR file.</li> <li>7. Proceed with the OPatch process.</li> </ol> <p><b>Note:</b> Ensure that the backup of the SAR files is taken properly.</p>

## 12.4 Extending or Customizing Custom SOA Composites

You can customize or extend some SOA components during design time in JDeveloper when logged in with the **Customization Developer** role. Components that are extended in JDeveloper can be further customized in JDeveloper when again logged in with the **Customization Developer** role. Customization changes are maintained in separate .xml files from the base component files. Note that you cannot make customizations in Source view in JDeveloper; only customizations made in Design view are supported.

**Notes:**

- New artifacts extended in the composite survive patching.
- Ensure that you provide unique names for any new components and artifacts that you extend. For example, prefix each component and artifact name with a unique identifier.

**Table 12–7** describes which existing base composite artifacts in a composite can be customized and which new artifacts can be extended when logged in to JDeveloper with the **Customization Developer** role.

**Table 12–7 Customizable and Extendable Artifacts in Customization Developer Role**

Artifacts	Existing Artifact in Base Composite is Customizable with Customization Developer Role?	Artifact is Extendable with Customization Developer Role?
Composite Components	Yes	Yes
BPEL process	Yes	Yes
Oracle Mediator	Yes	Yes
Human task	No	Yes
Business rule	No	Yes
XSLT Map	No	Yes
Cross references (XREFs)	No	No
Domain value maps	No	No
XSD	No	Yes
WSDL	No	Yes
Business events	No	Yes
JCA Adapters	No	Yes

**Table 12–8** provides more specific details about which artifacts can be extended when logged in to JDeveloper with the **Customization Developer** role.

**Table 12–8 Artifact Extensibility in JDeveloper with Customization Developer Role**

Artifact	Extendable?	Description
Composite	No	Only one composite per Oracle SOA Suite project is permitted.
BPEL process	Yes	Can drag a BPEL process from the Component Palette into the SOA Composite Editor or Oracle BPEL Designer.
Oracle Mediator	Yes	Can drag an Oracle Mediator from the Component Palette into the SOA Composite Editor or Oracle BPEL Designer.
Human task	Yes	Can drag a human task from the Component Palette into the SOA Composite Editor or Oracle BPEL Designer.

**Table 12-8 (Cont.) Artifact Extensibility in JDeveloper with Customization Developer**

Artifact	Extendable?	Description
Business rule	Yes	Can drag a business rule from the Component Palette into the SOA Composite Editor or Oracle BPEL Designer.
XSLT Map	Yes	Can extend a transformation in a transform activity in Oracle BPEL Designer or the Mediator Editor.
Domain Value Maps	No	The New Gallery dialog is disabled with the <b>Customization Developer</b> role.
Cross References (XREFs)	No	The New Gallery dialog is disabled with the <b>Customization Developer</b> role.
XSD	Yes	Right-click an Oracle SOA Suite project and select <b>SOA</b> , or as the result of extending other SOA artifacts.
WSDL	Yes	Right-click an Oracle SOA Suite project and select <b>SOA</b> , or as the result of extending other SOA artifacts.
Business events	Yes	Subscribe to or publish events for a BPEL process or Oracle Mediator component in the SOA Composite Editor, Oracle BPEL Designer, or Mediator Editor.
JCA adapters	Yes	Drag adapters from the Component Palette into the SOA Composite Editor or Oracle BPEL Designer.

### Task: Customize a Base Composite in JDeveloper

This section provides an overview of the steps for customizing a base composite of Oracle Fusion Applications in JDeveloper. These steps assume you know how to set up the customization layer through the `adf-config.xml` editor and know the customization classes defined by Oracle Fusion Applications. For more information, see Chapter "Customizing SOA Composite Applications" of the *Oracle Fusion Middleware Developer's Guide for Oracle SOA Suite*.

---

**Note:** See [Section 10.3.2, "Setting Up the JDeveloper Workspace and Composite Project for MDS Customization"](#) for instructions on setting up the JWS workspace and composite project when customizing Oracle Fusion Applications composites.

---

1. Install Oracle Fusion Applications with a SOA composite that you want to customize in JDeveloper.
2. In Oracle Enterprise Manager Fusion Applications Control, go to the home page of the SOA composite to export.
3. From the **SOA Composite** menu at the top of the page, select **Export**.
4. Obtain the base SAR file for initially customizing from other locations, including:
  - Checking out the base composite project from the source control system where the base composite project was checked in by the base development team. This way, no SAR file deployment, export command, or import command is involved.
  - Importing the base composite SAR file that was deployed from the base composite project.

- Importing the base composite SAR file that was exported (without runtime changes) from the Export Composite page of the Oracle Enterprise Manager Fusion Applications Control installation from which the SOA server is managed.
5. Extend layer values for customization to the `CustomizationLayerValues.xml` file (can perform this task in JDeveloper or from the directory structure).
  6. Start JDeveloper in the **Default Role**.
  7. Extend a new composite application.
  8. From the **File** main menu, select **Import > SOA Archive Into SOA Project** to import the exported SAR into the new composite in JDeveloper.
  9. In the Import Composite Archive wizard, select the **Import For Customization** checkbox.
  10. From the **Tools** main menu, select **Preferences > Roles > Customization Developer**.
  11. Restart JDeveloper, and customize the layers of the composite.
  12. Right-click the project and select **Deploy** to extend a customized SAR of the SOA composite in Oracle Fusion Applications.

---

**Note:** After performing the initial customizations described in these procedures, you can no longer export the composite from the runtime. This is because the composite is a merged composite, and no longer the original base composite.

---

For more information on exporting SAR files, see Section "Exporting a Running SOA Composite Application" of *Oracle Fusion Middleware Administrator's Guide for Oracle SOA Suite and Oracle Business Process Management Suite*.

#### Task: Extend or Customize Custom Business Rules

You can extend business rules in a composite during design time in JDeveloper when logged in with the **Customization Developer** role. After extending these business rules, you can further customize them in JDeveloper when again logged in with the **Customization Developer** role. You cannot customize existing business rules that are part of the base version of the composite.

For information on customizing business rules during runtime, see [Section 12.2, "Customizing SOA Composites."](#)

#### Task: Extend or Customize Custom BPEL Processes

You can extend or customize BPEL processes in a composite during design time in JDeveloper when logged in with the **Customization Developer** role. For example, you can perform the following tasks:

- Extend or delete a new scope or other activity
- Customize an activity
- Extend a partner link
- Extend a transformation

For more information about extending or customizing BPEL processes, see Part "Using the BPEL Process Service Component" of *Oracle Fusion Middleware Developer's Guide for Oracle SOA Suite*.

#### **Task: Extend or Customize Custom Human Tasks**

You can extend human tasks in a composite during design time in JDeveloper when logged in with the **Customization Developer** role. After extending these human tasks, you can further customize them in JDeveloper when again logged in with the **Customization Developer** role. You cannot customize existing human tasks that are part of the base version of the composite.

For more information on extending human tasks, see Part "Using the Human Workflow Service Component" of *Oracle Fusion Middleware Developer's Guide for Oracle SOA Suite*.

#### **Task: Extend or Customize Custom Oracle Mediators**

You can extend or customize Oracle Mediators in a composite during design time in JDeveloper when logged in with the **Customization Developer** role. For example, you can perform the following tasks:

- Extend a routing rule
- Customize an XPath condition
- Make any other changes, except those that impact files such as XSLs (for transformations), WSDLs, EDLs (for business events), or XSDs. Note that *new* artifacts can be extended or customized.

For more information, see Part "Using the Oracle Mediator Service Component" of *Oracle Fusion Middleware Developer's Guide for Oracle SOA Suite*.

#### **Task: Customize Composite Components**

You can customize composite endpoint properties in a composite during design time in JDeveloper when logged in with the **Customization Developer** role. For example, you can perform the following tasks:

- Extend and delete a reference binding component
- Extend and delete a service binding component (entry point)
- Extend, customize, and delete a wire between components

For more information, see Chapter "Developing SOA Composite Applications with Oracle SOA Suite" of *Oracle Fusion Middleware Developer's Guide for Oracle SOA Suite*.

#### **Task: Extend or Customize Transformations (in a Transform Activity)**

You cannot customize existing transformations that are part of the base composite in JDeveloper. However, you can extend a new transform activity in a BPEL process or in the Transformation Map dialog of an Oracle Mediator during design time in JDeveloper when logged in with the **Customization Developer** role. After extending the transformation, you can further customize it in JDeveloper when again logged in with the **Customization Developer** role. For example, you can perform the following tasks:

- Specify the mapper file (.xsl) to which the transform activity points from the **Mapper File** field of a transform activity in a BPEL process or the Transformation Map dialog of an Oracle Mediator. However, you cannot extend or customize mappings. The mappings are defined in the XSL file (not in the transform activity), which is not customizable.

- Copy an out-of-the-box XSL file into a custom XSL artifact, add the custom logic to the custom XSL, and customize the transform activity to reference the custom XSL. Additionally, you must copy the contents of the XSL file in the base composite into the custom XSL file.

#### **Task: Extend XSD or WSDL Files**

You can extend an XSD schema or WSDL document in JDeveloper when logged in with the **Customization Developer** role.

1. Right-click the Oracle SOA Suite project in the Application Navigator.
2. Select **SOA**.
3. Select the artifact to extend:

- **Create XML Schema**

Invokes the Create XML Schema dialog for extending a new XML schema file in the project. When complete, the new schema file automatically opens.

- **Create WSDL Document**

Invokes the Create WSDL dialog to extend a new WSDL file in the project.

#### **Task: Extend Business Events**

You can extend business events in JDeveloper when logged in with the **Customization Developer** role.

For more information, see Chapter "Using Business Events and the Event Delivery Network" of *Oracle Fusion Middleware Developer's Guide for Oracle SOA Suite*.

#### **Task: Extend JCA Adapters**

You can extend JCA adapters in JDeveloper when logged in with the **Customization Developer** role.

For more information, see *Oracle Fusion Middleware User's Guide for Technology Adapters*.

## **12.5 Deploying SOA Composite Customizations and Extensions**

You must redeploy a customized or extended composite after making changes in JDeveloper. The development and deployment phase is as follows:

- During base composite development, you create a customizable SOA project from the **Default** role in JDeveloper, set up customization layers, and deploy the composite to a base SAR file.
- During customization, you import (for customization) the base composite SAR file to extend a new SOA project, change from the **Default** role to the **Customization Developer** role, perform customizations, and deploy the composite to create a customized SAR file.

For more information, see Chapter "Customizing SOA Composite Applications" of the *Oracle Fusion Middleware Developer's Guide for Oracle SOA Suite*.

# Customizing and Extending Oracle BPM Project Templates

This chapter describes how to use JDeveloper to customize and extend BPM project templates.

This chapter includes the following sections:

- [Section 13.1, "About Customizing Project Templates"](#)
- [Section 13.2, "Customizing or Extending a Project Template"](#)
- [Section 13.3, "Publishing Project Templates"](#)

## 13.1 About Customizing Project Templates

BPM project templates are used to create new BPM projects. Project templates are created by developers and contain all of the elements necessary to create a new BPM project that can be deployed to runtime. This includes all of the necessary BPMN processes and business catalog components.

Oracle Fusion Applications provide default project templates containing the required BPMN processes and business catalog components. Refer to the product-specific documentation from Oracle Enterprise Repository available from Oracle Support for a list of the default BPM project templates provided by Oracle Fusion Applications.

Developers can customize and extend these project templates. Project templates are customized or extended by developers using Oracle BPM Studio. Oracle BPM Studio is an extension to JDeveloper that provides additional editors for creating and customizing BPMN processes and related components. For more information on Oracle BPM Studio see the *Oracle Fusion Middleware Modeling and Implementation Guide for Oracle Business Process Management*.

In the context of Oracle Fusion Applications, developers can customize project templates when it is necessary to customize or extend business catalog components that are part of the default project templates. Refer to the product-specific documentation from Oracle Enterprise Repository available from Oracle Support for a list of the default BPM project templates provided by Oracle Fusion Applications.

After customizing or extending a project template, it can be published to the Oracle BPM repository. Project templates are shared between Oracle BPM Studio and Oracle Business Process Composer using the Oracle BPM MDS repository. Additionally, BPM projects can be shared between Business Process Composer and JDeveloper users via the BPM repository.

---

**Note:** When customizing a project template, you should first make a copy of the existing template using JDeveloper. This enables you to avoid overwriting project templates previously published to the BPM repository.

---

After a template is published to the repository, it is available to Oracle Business Process Composer users. Business Process Composer users can create and deploy BPM projects created using these templates directly to the runtime test environment without having to reedit and deploy a project using JDeveloper. Using Oracle Business Process Composer business users can customize and extend BPMN process flows based on project template.

See "Workflow: Creating Project Templates" in the *Oracle Fusion Middleware Modeling and Implementation Guide for Oracle Business Process Management* for information on the typical workflow for sharing project templates between Oracle BPM Studio and Business Process Composer.

### 13.1.1 About the Business Catalog

The business catalog is a set of reusable components that contain all of the necessary technical implementation to create a BPMN process flow that can be deployed as part of a running Oracle Fusion application.

The business catalog contains the following components:

- Business rules

Define a business decision based on rules that enables dynamic decisions to be made at runtime that automate policies, computations, and reasoning while separating rule logic from underlying application code.

- Human tasks

Create a workflow that describes the tasks for users or groups to perform as part of an end-to-end business process flow.

- Services

Define how a BPMN process connects to other business processes and systems, including databases and web services.

Some elements of the business catalog can be customized using Oracle Business Process Composer. See [Section 7.1.2.2, "What You Can Customize Using Oracle Business Process Composer"](#) for information on those elements.

### 13.1.2 Before You Begin Using JDeveloper to Customize Project Templates

Before you customize the artifacts within a project template, including business catalog components, business processes, SOA components using JDeveloper, you should be familiar with the Oracle Fusion application architecture that enables customization, as described in [Section 1, "Customizing and Extending Oracle Fusion Applications."](#)

You should also understand the typical workflows for working with customizations, as described in [Section 2, "Understanding the Customization Development Lifecycle."](#)

In addition, you will need to do the following before you can use JDeveloper to customize BPM project templates:

- Download and install JDeveloper, and set up your development environment, as documented in "Chapter 2 Setting Up Your Development Environment" of the *Oracle Fusion Applications Developer's Guide*.
- Launch JDeveloper in the appropriate role.

## 13.2 Customizing or Extending a Project Template

This section outlines the general tasks you must perform to customize or extend an Oracle BPM project template.

### **Task: Open a Project Template**

You can open a project template with Oracle BPM Studio.

- For information on opening a project template, see "Working with Project Templates" in the *Oracle Fusion Middleware Modeling and Implementation Guide for Oracle Business Process Management*.

The specific project or project template you need to open depends on which Oracle Fusion application you are customizing. Refer to the product-specific documentation from Oracle Enterprise Repository available from Oracle Support for a list of the default BPM project templates provided by Oracle Fusion Applications.

### **Task: Create or Customize BPMN Processes**

BPMN processes are accessible using the BPM Project Navigator. For information on using the BPM Project Navigator, see "Oracle BPM Project Navigator" in the *Oracle Fusion Middleware Modeling and Implementation Guide for Oracle Business Process Management*.

For information on opening a BPMN process, see "How to Open a Business Process" in the *Oracle Fusion Middleware Modeling and Implementation Guide for Oracle Business Process Management*.

See "Working with Flow Objects in Your Process" of the *Oracle Fusion Middleware Modeling and Implementation Guide for Oracle Business Process Management* for more information on working with flow objects in your process.

See "Modeling Business Processes with Oracle BPM" of the *Oracle Fusion Middleware Modeling and Implementation Guide for Oracle Business Process Management* for general information on BPMN flow objects.

### **Task: Create or Modify Business Catalog Components**

Using Oracle BPM Studio, you can create or modify business catalog components within a project template.

- Services
- Human tasks
- Business Rules

### **Task: Customize SOA Components**

Oracle Fusion applications BPM projects are based on technology provided by the Oracle SOA Suite. This includes reusable components and services that are included as part of a project template.

In addition to customizing business catalog components, you can customize applications by customizing SOA components, including the following:

- Domain value maps
- BPEL processes
- Oracle Mediators

See [Section 12.4, "Extending or Customizing Custom SOA Composites"](#) for more information.

## 13.3 Publishing Project Templates

In Oracle BPM, publishing a project template refers to the process of saving it in the Oracle BPM MDS repository. You can publish project templates to the repository to make them available to Oracle Business Process Composer users.

The repository can also be used to share BPM projects between Oracle Business Process Composer and JDeveloper users as part of the process development life-cycle.

Publishing a project template to the BPM MDS repository makes them available to Oracle Business Process Composer users who can use them to create new BPM projects, which can be deployed to runtime. Before publishing a project template, you should ensure that the project has been tested and functions correctly.

### **Task: Configure an Oracle BPM MDS Connection**

Before publishing a project template to the Oracle BPM MDS repository, you must configure an MDS connection.

See "How to Configure a Connection to the Oracle BPM Metadata Service Repository" in the *Oracle Fusion Middleware Modeling and Implementation Guide for Oracle Business Process Management* for more information on creating a connection to the repository.

### **Task: Publish a Project Template**

See "How to Publish a Project or Project Template to Oracle BPM MDS" of the Oracle Fusion Middleware Modeling and Implementation Guide for Oracle Business Process Management for information on publishing a project template.

After publishing a project template, it is available to Oracle Business Process Composer users who can use it to create new BPMN process flows. See [Chapter 7, "Customizing and Extending BPMN Processes"](#) for more information.

# 14

---

## Customizing and Extending Oracle Enterprise Scheduler Jobs

This chapter describes how to use JDeveloper or Oracle Enterprise Manager Fusion Applications Control to create and extend Oracle Enterprise Scheduler jobs.

This chapter includes the following sections:

- [Section 14.1, "About Customizing and Extending Oracle Enterprise Scheduler Jobs"](#)
- [Section 14.2, "Extending Custom Oracle Enterprise Scheduler Jobs"](#)
- [Section 14.3, "Customizing Existing Oracle Enterprise Scheduler Jobs"](#)

### 14.1 About Customizing and Extending Oracle Enterprise Scheduler Jobs

Enterprise applications require the ability to respond to many real-time transactions requested by end users or web services. However, they also require the ability to offload larger transactions to run at a future time, or automate the running of application maintenance work based on a defined schedule.

Oracle Enterprise Scheduler provides the ability to run different job types, including: Java, PL/SQL and spawned processes, distributed across nodes in a server cluster. Oracle Enterprise Scheduler runs these jobs securely, and provides monitoring and management through Fusion Applications Control.

Oracle Enterprise Scheduler provides scheduling services for the following purposes:

- Distributing job request processing across a cluster of servers,
- Running Java, PL/SQL and binary jobs,
- Scheduling job requests based on recurrence,
- Managing job requests with Fusion Applications Control.

Oracle Enterprise Scheduler provides the critical requirements in a service-oriented environment to automate processes that must recur on a scheduled basis and to defer heavy processing to specific time windows. Oracle Enterprise Scheduler lets you:

- Support sophisticated scheduling and workload management,
- Automate the running of administrative jobs,
- Schedule the creation and distribution of reports,
- Schedule a future time for a step in a business flow for business process management.

### 14.1.1 Main Steps for Extending Oracle Enterprise Scheduler Jobs

Extending Oracle Enterprise Scheduler jobs involves the following main steps:

1. Develop the code that implements the job logic.
2. Create a metadata file for the job definition.
3. Grant permissions to the job, such that only those with the proper permissions can request job submission.
4. Enable job request submission, using an existing hosting application, a pre-configured user interface or a new customized application.

### 14.1.2 Main Steps for Customizing Oracle Enterprise Scheduler Jobs

Customizing Oracle Enterprise Scheduler jobs involves editing job properties using Oracle Enterprise Manager Fusion Applications Control. The job properties that you can modify are described in [Table 14-4](#).

### 14.1.3 Before You Begin Extending and Customizing Oracle Enterprise Scheduler Jobs

Before you extend and customize Oracle Enterprise Scheduler jobs, you should be familiar with the Oracle Fusion application architecture that enables customization, as described in [Chapter 1, "Customizing and Extending Oracle Fusion Applications."](#) You should also understand the typical workflow for working with customizations, as described in [Chapter 2, "Understanding the Customization Development Lifecycle."](#)

You will need to do the following before you can begin extending Oracle Enterprise Scheduler jobs:

- For developers:  
Set up JDeveloper. For more information, see [Section 1.3.2, "Installing Customization Tools."](#)
- For administrators:
  - Install Oracle Fusion Applications, making sure to provision Oracle Enterprise Scheduler services. For more information, see the *Oracle Fusion Applications Installation Guide*.
  - Start Fusion Applications Control. For more information about starting up and using Fusion Applications Control, see the chapter "Getting Started with Managing Oracle Fusion Applications" in *Oracle Fusion Applications Administrator's Guide*.

## 14.2 Extending Custom Oracle Enterprise Scheduler Jobs

There are two main use cases for creating Oracle Enterprise Scheduler jobs.

### Oracle Enterprise Scheduler Administrator

Administrators can create a new job definition using Oracle Enterprise Manager Fusion Applications Control console, using an existing hosting application. Scheduled jobs typically required by administrators include database maintenance tasks using PL/SQL or running spawned jobs or scripts such as SQL\*Plus scripts to load data into the database. Once you have defined the job, use Oracle Enterprise Manager Fusion Applications Control to submit the job request.

## Developer or System Integrator

When using an existing hosting application, use Fusion Applications Control to create Oracle Business Intelligence Publisher, PL/SQL and spawned jobs. Use JDeveloper to create Java jobs and develop a new hosting application that executes a set of jobs. A Java job might invoke an Oracle ADF Business Components service or a SOA composite, for example.

In cases where there is no need to repackage the hosting application, PL/SQL, binary, Oracle BI Publisher and Java jobs can be added to any hosting application. Optionally, you can execute Java jobs from a custom hosting application.

System integrators may want to use Fusion Applications Control to develop a job, while developers may prefer JDeveloper. Jobs are typically submitted using the scheduled request submission UI. Alternatively, it is possible to develop an Oracle ADF application with screens for submitting Oracle Enterprise Scheduler jobs.

### Task: Implement the Logic for the Oracle Enterprise Scheduler Job

An Oracle Enterprise Scheduler job is a request to execute a specific task written in code or a script, such as Java, PL/SQL, spawned jobs, and so on.

An example of logic to be implemented by a scheduled job is writing particular data to a database under certain conditions, for example, daily shift schedules for a given sub-set of employees.

### Task: Create a Job Definition Metadata File

An Oracle Enterprise Scheduler job definition specifies the type of job to be run (such as Java, PL/SQL type jobs, and so on), the hosting application that will run the job, and any additional required or optional parameters and properties for the job.

It is possible to create a job definition in Oracle Enterprise Manager Fusion Applications Control or JDeveloper.

The minimum required properties and parameters for each job type are as follows:

- Oracle BI Publisher jobs: Specify the `report_id` parameter. Specify Oracle BI Publisher parameters as job parameters with required validation. These can be entered by end users during request submission using the request submission user interface.

If the report is a bursting report, identify it as such by selecting the bursting check box.

- PL/SQL jobs: In the job definition, specify the PL/SQL procedure that includes the job logic implementation.

All input arguments to the PL/SQL procedure can be specified as parameters with required validation. These can be entered by end users during request submission using the request submission user interface.

- All other job types: Specify the name of the implementation logic and parameters in the job definition.

For more information about creating a job definition in Oracle Enterprise Manager Fusion Applications Control, see the chapter "Managing Oracle Enterprise Scheduler Service and Jobs" in *Oracle Fusion Applications Administrator's Guide*.

For more information about creating a job definition in JDeveloper, see the chapter "Working with Extensions to Oracle Enterprise Scheduler" in *Oracle Fusion Applications Developer's Guide for Oracle Enterprise Scheduler*.

**Task: Grant Relevant Permissions**

Grant the appropriate permissions for the application using the Oracle Authorization Policy Manager.

An example of the use of relevant permissions is to grant execution permissions to a role so that users belonging to that role can submit the job.

For more information about granting relevant permissions to a deployed application, see *Oracle Fusion Middleware Oracle Authorization Policy Manager Administrator's Guide (Oracle Fusion Applications Edition)*.

**Task: Enable Job Request Submission**

You can enable job request submissions through an Oracle ADF user interface using JDeveloper or Fusion Applications Control.

When using JDeveloper to enable job request submissions through an Oracle ADF user interface, you must define a view object to capture properties filled in by end users.

If a job is defined with properties that must be filled in by end users, the user interface allows end users to fill in these properties prior to submitting the job request. For example, if the job requires a start and end time, end users can fill in the desired start and end times in the space provided by the user interface.

The properties that are filled in by end users are associated with a view object, which in turn is associated with the job definition itself. When the job runs, Oracle Enterprise Scheduler accesses the view object to retrieve the values of the properties.

You could, alternatively, submit job requests using Fusion Applications Control. Using Fusion Applications Control to enable job request submissions through an Oracle ADF user interface does not require you to create a view object for capturing end user data.

---

**Note:** Suppose a parameter view object is VLinked to another view object (VO1). If you customize the view object using JDeveloper, then the Oracle Enterprise Scheduler job submission UI list of values reflects this customization, if the customization is in the MDS runtime database.

---

For more information about submitting job requests using Fusion Applications Control, see the chapter "Managing Oracle Enterprise Scheduler Service and Jobs" in *Oracle Fusion Applications Administrator's Guide*.

For more information about defining a view object for use with a job submission interface, see the chapter "Working with Extensions to Oracle Enterprise Scheduler" in *Oracle Fusion Applications Developer's Guide for Oracle Enterprise Scheduler*.

### 14.2.1 Extending a Custom PL/SQL Oracle Enterprise Scheduler Job

Extending a custom PL/SQL Oracle Enterprise Scheduler job involves creating a PL/SQL package and defining job metadata.

**Task: Implement the Logic for the PL/SQL Job**

Implementing a PL/SQL scheduled job involves creating a PL/SQL package and defining the job metadata using the PL/SQL job type.

To implement the logic for a PL/SQL job:

1. Create a PL/SQL package, including the required `errbuf` and `retcode` arguments. A sample PL/SQL package is shown in [Example 14-1](#).

**Example 14–1 Sample PL/SQL package**

```

CREATE OR REPLACE PACKAGE XxSamplePkg AUTHID CURRENT_USER AS

    Procedure SampleJob (
        errbuf out nocopy varchar2,
        retcode out nocopy varchar2,
        name in varchar2 );

END XxSamplePkg;
/


CREATE OR REPLACE PACKAGE BODY XxSamplePkg AS

    Procedure SampleJob (
        errbuf out nocopy varchar2,
        retcode out nocopy varchar2,
        name in varchar2 )
    IS

        begin
            -- Write log file content using the FND_FILE API.
            FND_FILE.PUT_LINE(FND_FILE.LOG, 'Running Stored procedure
SampleJob.....');
            FND_FILE.PUT_LINE(FND_FILE.LOG, 'FND USERNAME : ' || FND_GLOBAL.USER_NAME);

            -- Write log file content using the FND_FILE API.
            FND_FILE.PUT_LINE(FND_FILE.OUTPUT,' Name : ' || name );
            FND_FILE.PUT_LINE(FND_FILE.OUTPUT, 'Job Request id : ' || FND_JOB.REQUEST_ID
);

            errbuf := fnd_message.get_string('FND', 'COMPLETED NORMAL');
            retcode := 0;

        end SampleJob;

END XxSamplePkg;
/

```

2. Deploy the package to Oracle Database.
3. Grant the required permissions, and perform any other necessary tasks in the database.

```
grant execute on xxSampleJob to FUSION_APPS_EXECUTE;
```

For more information about granting permissions for the execution of a PL/SQL job, see the section "Performing Oracle Database Tasks for PL/SQL Stored Procedures" in the chapter "Creating and Using PL/SQL Jobs" in *Oracle Fusion Applications Developer's Guide for Oracle Enterprise Scheduler*.

4. Test the package.

**Task: Create a Job Definition Metadata File for the PL/SQL Job**

Use Functional Setup Manager to define a job definition metadata file for the PL/SQL job. The job definition metadata file may also include user properties for the PL/SQL job as well as UI parameters to be displayed at runtime.

For more information about creating an Oracle Enterprise Scheduler metadata file, see the section "Creating a Job Definition" in the chapter "Managing Oracle Enterprise Scheduler Service and Jobs" in *Oracle Fusion Applications Administrator's Guide*.

To create a job definition metadata file for a PL/SQL job:

1. Login to Functional Setup Manager as a user with the role ASM\_IMPLEMENTATION\_MANAGER\_DUTY. For example, you can login with the username APPLICATION\_IMPLEMENTATION\_CONSULTANT.

The URL for Functional Setup Manager is as follows.

<https://<HOST>/setup/faces/TaskListManagerTop>

2. In Functional Setup Manager, select the **Setup and Maintenance** work area and click the **All Tasks** tab. Search for all tasks.
3. From the list of tasks that displays, select the relevant UI application you will use to host the job definitions and parameter view objects. This Fusion application is the portlet producer application for the job.

Click the **Go to Task** button.

The Manage Job Definitions tab displays, as shown in [Figure 14–1](#).

**Figure 14–1 The Manage Job Definitions tab**

Name	Display Name	Description	Path	Execution Type	Job Type
*AgingSevenBucket	Collections Aging 7 Bucket Report	Identifies customer's /oracle/apps/ess/fina Java			BIPJobType
*AgingSevenBucketB	Collections Aging by Collector 7 Bucket Report	Identifies customer's /oracle/apps/ess/fina Java			BIPJobType
*BorrowedLenProc	Distribute Borrowed and Lent Amounts	Creates borrowed an /oracle/apps/ess/proj PL SQL			PlsqlJobType
*BuildNewOrganizat	Build New Organization Burden Multipliers	Adds burden multiple /oracle/apps/ess/proj Java			BIPJobType
*ContractsBulkImport	Import Contract from External Systems	Imports contracts in t /oracle/apps/ess/con Java			JavaJobType
*ContractsBulkImportPurge	Purge Contract Import Interface Tables	Purges error records /oracle/apps/ess/con Java			JavaJobType
*DraftPDFGenerator	Generate Contract PDFs for Text Search	Generates PDFs for a /oracle/apps/ess/con Java			JavaJobType
*DraftPDFGeneratorS	Generate Contract PDFs for Text Search: Subprocess	Generates PDFs for a /oracle/apps/ess/con Java			JavaJobType
*GenerateBurdenTra	Generate Burden Transactions	Summarizes burden c /oracle/apps/ess/proj Java			BIPJobType
*GenerateBurdenTraG	Generate Burden Transactions	Summarizes burden c /oracle/apps/ess/proj PL SQL			PlsqlJobType
*IdentifyTransactions	Identify Cross-Charge Transactions	Identifies eligible exp /oracle/apps/ess/proj PL SQL			PlsqlJobType
*KeywordOptimizeJot	Optimize Keyword Search Index for Contract Clauses	Optimizes the clause /oracle/apps/ess/con PL SQL			PlsqlJobType
*KeywordSyncJob	Build Keyword Search Index for Contract Clauses	Enables clause search /oracle/apps/ess/con PL SQL			PlsqlJobType
*OrgDenormJob	Denormalize Organization Hierarchies: Generate Exception Report	Prints the summary in /oracle/apps/ess/proj Java			BIPJobType
*OrgDenormProcess	Denormalize Organization Hierarchies	Converts all hierarchi /oracle/apps/ess/proj PL SQL			PlsqlJobType
*PjRbsRefreshResou	Refresh Resource Breakdown Structure Element Names	Refreshes the names /oracle/apps/ess/proj PL SQL			PlsqlJobType
*RecalculateBurdenC	Recalculate Burden Cost Amounts	Identifies expenditure /oracle/apps/ess/proj Java			BIPJobType
*RecalculateBurdenC	Recalculate Burden Cost Amounts	Identifies expenditure /oracle/apps/ess/proj PL SQL			PlsqlJobType
*ReceivablesOpenAc	Open Receivables Open Accounting Period	Opens receivables ac /oracle/apps/ess/fina PL SQL			PlsqlJobType
*StatusMgmtMainRec	Update Contract Status	Updates the status o /oracle/apps/ess/con PL SQL			PlsqlJobType
*StatusMgmtSubReq	Update Contract Status: Subprocess	Updates the status o /oracle/apps/ess/con PL SQL			PlsqlJobType
*TemplateKeywordDj	Optimize Keyword Search Index for Contract Terms Templates	Optimizes the contrac /oracle/apps/ess/con PL SQL			PlsqlJobType
*TemplateKeywordSy	Build Keyword Search Index for Contract Terms Templates	Enables contract term /oracle/apps/ess/con PL SQL			PlsqlJobType
*WorkTypeUpgradeB	Update Work Type: Generate Success Report	Provides a summary c /oracle/apps/ess/proj Java			BIPJobType
*WorkTypeUpgradeJ	Update Work Type	Updates work type or /oracle/apps/ess/proj PL SQL			PlsqlJobType

4. In the Manage Job Definitions tab, click the **New** button.
5. In the Create Job Definition tab, click **Show More** to display all parameters and enter the values for the job shown in [Table 14–1](#).

**Table 14–1 PL/SQL Job Definition Values**

Field	Description
Display Name	Enter a display name for the job.
Name	Enter a name for the job definition.
Path	Specify the trailing package name for the job definition metadata. The default namespace or path for custom job definitions begins with oracle/apps/ess/custom. For example, when entering test in the Path text field, the job definition is stored in the globalEss MDS namespace as oracle/apps/ess/custom/test.
Job Application Name	From the dropdown list, select the name of the hosting application running the Oracle Enterprise Scheduler job.
Job Type	Select the job type from the dropdown list, namely the PlsqlJobType.
Procedure Name	Enter the name of the stored procedure to run as part of the PL/SQL job execution.
Standard request submission flag	Check this box to indicate that the job request is to be submitted in the standard manner.

6. At the bottom of the pane, click the **User Properties** tab. Define the following user properties by clicking the **New** button, as shown in [Table 14–2](#).

**Table 14–2 PL/SQL User Properties**

Name	Data Type	Default Value	Read Only
EXT_PortletContainerWebModule	String	For the default value, enter the name of the web module which Functional Setup Manager will use as a portlet when submitting the job request.	N/A
numberOfArgs	String	Set the number of job submission arguments, including errbuf and retcode.	N/A

**Note:** Typically, the web context is registered as the web module name. Verify with your applications administrator the value of the registered web module name in the Topology Manager or Functional Setup Manager. Registering the correct web module name enables the correct remote rendering of the Fusion application job request parameters from the Oracle Enterprise Scheduler central UI.

7. Click the **<Job Definition Name>: Parameters** tab and specify UI parameters as required. The UI parameter fields are described in [Table 14–3](#).

**Table 14–3 PL/SQL Job UI Parameters**

Field	Description
Prompt	Enter the text to be displayed at the prompt that displays during run time.
Data Type	From the dropdown list, select the relevant data type.
Page Element	From the dropdown list, select the UI page element you want to use to display the parameter, for example, a text box.

8. Click **Save and Close** to create and save the new Oracle Enterprise Scheduler PL/SQL job definition.

## 14.2.2 Extending a Custom Oracle BI Publisher Oracle Enterprise Scheduler Job

Implementing a Oracle BI Publisher scheduled job involves creating a Oracle BI Publisher report on the Oracle BI Publisher Server and defining the Oracle Enterprise Scheduler job metadata.

### Task: Implement the Logic for the Oracle BI Publisher Job

For information about implementing an Oracle BI Publisher job, see the chapter "Using BI Publisher with Oracle JDeveloper" in the *Oracle Fusion Middleware Developer's Guide for Oracle Business Intelligence Publisher (Oracle Fusion Applications Edition)*.

### Task: Create a Job Definition Metadata File for the Oracle BI Publisher Job

Using Functional Setup Manager, create an Oracle BI Publisher type job definition.

To create a job definition metadata file for an Oracle BI Publisher job:

1. Follow the instructions in "[Task: Create a Job Definition Metadata File for the PL/SQL Job](#)".
2. From the Job Type dropdown list, select **BinaryJobType**.
3. In the User Properties tab, define only the **EXT\_PortletContainerWebModule** property.

## 14.2.3 Extending a Custom Java Oracle Enterprise Scheduler Job

Implementing a Java scheduled job involves implementing the Java business logic and defining the relevant Oracle Enterprise Scheduler job metadata. Use JDeveloper to implement a Java job and deploy the job as a shared library. Modify the deployment descriptor of the deployed user interface or hosting application EAR file so that it points to the shared library. Redeploy the file.

Deploying the job as a shared library allows you to add additional jobs in the future without having to redeploy the hosting application. For more information about deploying Oracle ADF applications, see the chapter "Deploying Fusion Web Applications" in the *Oracle Fusion Middleware Fusion Developer's Guide for Oracle Application Development Framework*.

### Task: Implement the Logic for the Java Job

In order to develop an application that runs a Java class under Oracle Enterprise Scheduler, you must define the Java class that implements the Oracle Enterprise Scheduler executable interface. The executable interface defines the contract that enables using Oracle Enterprise Scheduler to invoke a Java class.

To create a Java class for an existing Oracle Enterprise Scheduler Fusion application, take the following steps:

- Create an application in JDeveloper.
- Create a project in JDeveloper.
- Develop the application code that uses the Oracle Enterprise Scheduler Java APIs.

To implement the logic for an Oracle Enterprise Scheduler Java job:

1. In JDeveloper, create an application and project. Make sure to include EJB and Java technologies in the project.
2. Add the Oracle Enterprise Scheduler extensions to the project.

- a. In the Application Navigator, right-click the project you just created. Select **Project Properties** and then select **Libraries and Classpath**.
  - b. In the Libraries and Classpath pane, click **Add Library**.
  - c. In the Add Library window, in the Libraries field, select **Enterprise Scheduler Extensions** and click **OK**.
3. Create a Java class using the Oracle Enterprise Scheduler package.
    - a. In the project overview tab, click the Java Files link.
    - b. In the Java Files pane, click the **New** button. From the Create New in Project menu, select **Project Name** and then select **Java Class**.

The Create Java Class window displays.

    - c. In the Create Java Class window, enter a name for the Java class and the package name **oracle.apps.financials.ess.program** in the fields provided. Accept the remaining default values.
  4. In the Java class, develop the code that will do the work of the Java job.  
**Example 14–2** shows sample code which illustrates the use of an Oracle Enterprise Scheduler job request file handle and writes a job request parameter submitted to the request log and output files.

#### **Example 14–2 Sample Java code**

```
package oracle.apps.financials.ess.program;

import java.io.IOException;
import oracle.as.scheduler.Cancellable;
import oracle.as.scheduler.Executable;

import oracle.as.scheduler.ExecutionCancelledException;
import oracle.as.scheduler.ExecutionErrorException;
import oracle.as.scheduler.ExecutionPausedException;
import oracle.as.scheduler.ExecutionWarningException;
import oracle.as.scheduler.RequestExecutionContext;

import oracle.as.scheduler.RequestParameters;
import oracle.as.scheduler.SystemProperty;

import oracle.as.scheduler.cp.exec.ProcessHelper;
import oracle.as.scheduler.cp.file.LogFile;
import oracle.as.scheduler.cp.file.OutputFile;

public class XxSampleJob implements Executable, Cancellable {

    private OutputFile requestOutput;
    private LogFile requestLog;

    private boolean m_isCancelled = false;

    private long request_id = 0L;
    private String requestParameter1 = null;

    public XxSampleJob() {
        super();
    }

    public void execute(RequestExecutionContext ctx,
                       RequestParameters params) throws ExecutionErrorException,
```

```

        ExecutionWarningException,
        ExecutionCancelledException,
        ExecutionPausedException {

    request_id = ctx.getRequestId();

    System.out.println("XxSampleJob Running, Request ID: " +
                       ctx.getRequestId());

    try {

        String userFileDir =
            (String)params.getValue(SystemProperty.USER_FILE_DIR);

        String sysPropUserName =
            (String)params.getValue(SystemProperty.USER_NAME);

        // Read the job request parameter.
        requestParameter1 = (String) params.getValue("submit.argument1");

        requestOutput = ProcessHelper.getOutputFile();
        requestOutput.writeln("Sample ESS Java job execution OUTPUT");
        requestOutput.writeln("USER_NAME as SystemProperty: " +
                             sysPropUserName);
        requestOutput.writeln("ESS Job requestID: " + request_id);
        requestOutput.writeln("ESS Job request parameter: "
                             + requestParameter1);

        requestLog = ProcessHelper.getLogFile();
        requestLog.writeln("Sample ESS Java job execution LOG");
        requestLog.writeln("ESS requestFileDirectory: " + userFileDir);
        requestLog.writeln("ESS Job requestID: " + request_id);
        requestLog.writeln("ESS Job request parameter: "
                           + requestParameter1);

    } catch (Exception ex) {

        System.out.println("Exception running XxSampleJob: " +
                           ex.getMessage());
        ex.printStackTrace();

    } finally {

        try {

            // Close all open job request log and output files.
            ProcessHelper.closeAllFiles();

        } catch (IOException ioe) {

            System.out.println("Exception closing files: " +
                               ioe.getMessage());
            ioe.printStackTrace();
        }

    }

}

@Override

```

```

public void cancel() {
    m_isCancelled = true;
}

}

```

### Task: Deploy the Java Business Logic

In order to deploy the Java logic of an Oracle Enterprise Scheduler Java job, identify an existing Fusion application as the target hosting application.

Next, update the Java business logic for an existing Fusion application as follows:

- Package the Java application in a JAR file.
- Update JAR module in the Fusion application classpath.
- Bounce the server instance to load the Java program logic in the Fusion application class loader.

To deploy the Java business logic:

1. Create a deployment profile for the project.
  - a. In JDeveloper, from the Application Navigator, select the project you created. Build the project to ensure that the Java class successfully compiles.
  - b. Right-click the project, select **Project Properties** and **Deployment**.
  - c. In the Deployment Profiles field, click **New** to create a deployment profile for the JAR file.

The Create Deployment Profile window displays.

- d. In the Create Deployment Profile window, enter a name for the deployment profile and click **OK**.
- e. In the Edit JAR Deployment Profile Properties window, verify that the Java job class is included in the JAR module output and click **OK**.

2. Package the Oracle Enterprise Scheduler Java class into a JAR file and deploy it.
  - a. From the Application Navigator, right-click the project you created. Select **Deploy** and then select the JAR file you just created.

The Deployment Action window displays.

- b. In the Deployment Action window, click **Finish** to create a packaged JAR archive.

The archive module is deployed to the default project deployment path, for example, **\$JDEV\_HOME/<PROJECT\_NAME>/deploy/<JAR\_NAME>.jar**.

---

**Note:** All custom JAR files must begin with the prefix **xx**, for example **xxMyJar.jar**.

---

3. Update the JAR module in the application classpath of the Oracle Enterprise Scheduler hosting application.
  - a. Locate the expanded deployment directory of the EAR file for the existing Fusion application, for example **\$MW\_**

**HOME**/fusionapps/applications/fin/deploy/EarFinancialsEss.ear/APP-INF/lib.

- b. Copy the deployed custom jar file to the expanded directory.
4. In the domain to which the Oracle Enterprise Scheduler hosting application is deployed, restart Oracle Enterprise Scheduler.

The Oracle Enterprise Scheduler job executes the updated Java class once the application class loader successfully loads the updated class.

For more information about restarting the Oracle Enterprise Scheduler, see the section "Starting and Stopping an Oracle Enterprise Scheduler Service Instance" in the chapter "Managing Oracle Enterprise Scheduler Service and Jobs" in *Oracle Fusion Applications Administrator's Guide*.

#### **Task: Create a Job Definition Metadata File for the Java Job**

Using Functional Setup Manager, create a Java type job definition.

To create a job definition metadata file for a Java job:

1. Follow the instructions in "[Task: Create a Job Definition Metadata File for the PL/SQL Job](#)".
2. In the Create Job Definition window, from the Job Type dropdown list, select **JavaJobType**.
3. In the Create Job Definition window, in the Class Name field, enter the fully qualified class name of the Java business logic.
4. In the Create Job Definition window, In the User Properties tab, define only the **EXT\_PortletContainerWebModule** property.
5. Click the **<Job Definition Name>: Parameters** tab and specify UI parameters as required. The UI parameter fields are described in [Table 14-3](#).
6. Click **Save and Close** to create and save the new Oracle Enterprise Scheduler Java job definition.

#### **14.2.4 Submitting Oracle Enterprise Scheduler Jobs**

You can use Oracle Fusion Applications to submit Oracle Enterprise Scheduler jobs.

To submit Oracle Enterprise Scheduler jobs:

1. In the main area of Oracle Fusion Applications, access the Schedule Processes page by clicking the **Navigator** menu and then selecting **Tools** and **Schedule Processes**.
2. Click **Schedule New Process**.

The Search and Select: Process Name window displays.
3. In the Process Name field, enter the name of the Oracle Enterprise Scheduler job you want to schedule and click **Search**.

The job name displays in the search results table.
4. From the search results table, select the job name and click **OK**.

The Process Details page displays.
5. In the Process Details page, in the Parameters field, specify any required parameters.

6. Click **Submit** to request that the Oracle Enterprise Scheduler instance execute the job. Click **Close** to return to the Scheduled Processes page.
7. In the Scheduled Processes page, refresh the Search Results table to monitor the status of submitted job.

## 14.3 Customizing Existing Oracle Enterprise Scheduler Jobs

You can customize Oracle Enterprise Scheduler jobs that are associated with Fusion applications. Customizing existing Oracle Enterprise Scheduler jobs involves editing job properties using Oracle Enterprise Manager Fusion Applications Control.

An example of a customization is to set the time-out value for a scheduled job to be run asynchronously. When the job takes longer than the time-out, you can find the job that timed out in Fusion Applications Control and manually complete the job.

The job properties that can be edited are shown in [Table 14–4](#).

For more information about editing scheduled job properties, see the chapter "Managing Oracle Enterprise Scheduler Service and Jobs" in *Oracle Fusion Applications Administrator's Guide*.

**Table 14–4 Job Properties**

API	Description
oracle.as.scheduler.SystemProperty.PRIORITY	This property specifies the request processing priority, from 0 to 9, where 0 is the lowest priority and 9 is the highest. If this property is not specified, the system default value used is oracle.as.scheduler.RuntimeService#DEFAULT_PRIORITY.
oracle.as.scheduler.SystemProperty.RETRIES	This property defines the numerical value that specifies the retry limit for a failed job request. If job execution fails, the request retries up to the number of times specified by this property until the job succeeds. If the retry limit is zero, a failed request will not be retried. If this property is not specified, the system default used is oracle.as.scheduler.RuntimeService#DEFAULT_RETRIES.
oracle.as.scheduler.SystemProperty.REQUEST_CATEGORY	This property specifies an application-specific label for a request. The label, defined by an application or system administrator, allows administrators to group job requests according to their own specific needs.
oracle.as.scheduler.SystemProperty.ASYNC_REQUEST_TIMEOUT	This property specifies the time in minutes that the job request processor waits for an asynchronous request after it has begun execution. After the time elapses, the job request times out.
enableTrace	The property specifies a numerical value that indicates the level of tracing control for the job. Possible values are as follows: <ul style="list-style-type: none"> <li>■ 1: Database trace</li> <li>■ 5: Database trace with bind</li> <li>■ 9: Database trace with wait</li> <li>■ 13: Database trace with bind and wait</li> <li>■ 16: PL/SQL profile</li> <li>■ 17: Database trace and PL/SQL profile</li> <li>■ 21: Database trace with bind and PL/SQL profile</li> <li>■ 25: Database trace with wait and PL/SQL profile</li> <li>■ 29: Database trace with bind, wait and PL/SQL profile</li> </ul>
enableTimeStatistics	This property enables or disables the accumulation of time statistics.



---

# Customizing Security for ADF Application Artifacts

This chapter describes how to customize security for custom or extended business objects and related, custom or extended application artifacts defined by Oracle Application Development Framework (Oracle ADF).

Security customization in the production environment is typically restricted to the IT security manager using Oracle Authorization Policy Manager; however, during the development phase of application customization, you can perform similar security customization tasks using Oracle Authorization Policy Manager and JDeveloper.

This chapter includes the following sections:

- [Section 15.1, "About the Oracle Fusion Security Approach"](#)
- [Section 15.2, "About Extending the Oracle Fusion Security Reference Implementation"](#)
- [Section 15.3, "About Extending and Securing Oracle Fusion Applications"](#)
- [Section 15.4, "Defining Data Security Policies on Custom Business Objects"](#)
- [Section 15.5, "Enforcing Data Security in the Data Model Project"](#)
- [Section 15.6, "Defining Function Security Policies for the User Interface Project"](#)

## 15.1 About the Oracle Fusion Security Approach

Oracle Fusion Applications is secure as delivered. The Oracle Fusion security approach tightly coordinates various security concerns of the enterprise, including:

- The ability to define security policies to specify the allowed operations on application resources, including viewing and editing data and invoking functions of the application.
- The ability to enforce security policies by roles assigned to end users, and not directly enforced on the end users of the system.

For example, when an end user attempts to access a task flow, whether or not the end user has the right to enter the flow and view the contained web pages is determined by the roles provisioned to the end user and the security policies defined for those roles.

In the enterprise, the IT security manager ensures end users are provisioned with sufficient access rights to perform the duties of their various jobs. These provisioning tasks involve Oracle Fusion Middleware tools that integrate with Oracle Fusion Applications and allow IT personnel to extend the *Oracle Fusion security reference*

*implementation*, which consists of predefined security policies and roles used in Oracle Fusion Applications. These tools directly update a copy of the reference implementation in the deployed application's security policy store and identity store.

From the standpoint of the application developer who seeks to apply the Oracle Fusion security approach to an Oracle Fusion application that they extend, the security implementation process overlaps with tasks performed by IT personnel. You may or may not need to extend the Oracle Fusion security reference implementation, depending upon how end users will interact with the new resource. At the end of the process, you must ensure that any new resource you create, such as a business object in the data model project or a task flow in the user interface project, has sufficient security policies to grant access privileges and suitable roles to receive the access privileges.

### 15.1.1 How to Proceed With This Chapter

Customizing security is a complex process that involves working with several tools, familiarity with diverse technologies, and coordination between the application developer and IT security manager. For a concise summary of the security customization scenarios and corresponding tasks, see [Table 15-1 in Section 15.3.3, "Oracle Fusion Security Customization Scenarios."](#)

After familiarizing yourself with the types of security customizations performed by the application developer, read the following sections to gather a more complete understanding of the security customization process.

- For an overview of the Oracle Fusion security reference implementation, see [Section 15.2](#).
- For a list of Oracle Fusion security guidelines that dictate which security artifacts in the Oracle Fusion security reference implementation you may or may not modify, see [Section 15.3.1](#).
- For an overview of the steps you follow to secure a new resource, see [Section 15.3.2](#).
- For additional background about the type of resource customizations that require customizing security, see [Section 15.3.4](#) and [Section 15.3.5](#).
- For details about the security artifacts that you define to create security policies, see [Section 15.3.6](#) through [Section 15.3.9](#).
- For a list of prerequisite tasks to be completed before customizing security, see [Section 15.3.11](#).
- For information about the tools involved in customizing security, see [Section 15.4](#) through [Section 15.6](#).

### 15.1.2 Related Security Documents

The following related documents contain important information specific to customizing security in Oracle Fusion Applications. References to these documents appear throughout this chapter. Please consult these documents for complete details.

- *Oracle Fusion Applications Security Guide*  
Describes the concepts and best practices of the Oracle Fusion security approach. This is the main document addressing the Oracle Fusion security approach.
- *Oracle Fusion Applications Security Hardening Guide*

- Describes how the IT security manager proceeds to implement the Oracle Fusion security reference implementation for their enterprise.
- *Oracle Fusion Applications security reference manuals*  
Describes the segregation of duties in the Oracle Fusion security reference implementation. Each Oracle Fusion application has its own reference manual.
  - *Oracle Fusion Applications Developer's Guide*  
Describes how to secure new custom resources in Oracle Fusion Applications. Includes chapters describing how to implement data security and function security for new resources.
  - *Oracle Fusion Applications Administrator's Guide*  
Summarizes available security administration tasks in a single chapter.
  - *Oracle Fusion Middleware Oracle Authorization Policy Manager Administrator's Guide (Oracle Fusion Applications Edition)*  
Describes how to create and modify data security policies and data role templates.
  - *Oracle Fusion Middleware Application Security Guide*  
Describes the concepts and best practices of Oracle Platform Security Services (OPSS) upon which Oracle Fusion security is based. This is the main document addressing the architecture of Oracle security services.
  - *Oracle Fusion Middleware Fusion Developer's Guide for Oracle Application Development Framework*  
Describes ADF Security, through which Oracle ADF components interact with OPSS.
  - *Oracle Fusion Middleware User's Guide for Oracle Identity Manager*  
Describes role provisioning and other identity management tasks.
  - *Oracle Database Security Guide*  
Describes implementing security policies at the level of the database.
  - JDeveloper online help topics  
Describes the tools used to create database objects using JDeveloper.

## 15.2 About Extending the Oracle Fusion Security Reference Implementation

The Oracle Fusion security approach is embodied in the Oracle Fusion security reference implementation which delivers predefined roles and security policies that address the common business needs of the enterprise. The reference implementation can be extended to adjust to the needs of a specific enterprise. The predefined security policies implement role-based access control: a set of roles recognizable as jobs, a role hierarchy that contains the duties for those jobs, and a set of role provisioning events and workflows. The Oracle Fusion security reference implementation represents the security guidelines of what Oracle considers to be the general case for jobs, roles, duties, and segregation of duties.

In general, the Oracle Fusion security reference implementation is designed to require only small changes to adjust Oracle Fusion security for a specific enterprise. The reference implementation provides a comprehensive set of predefined security policies and predetermined data role templates that may be customized to generate security

policies. From the standpoint of the IT security manager who addresses the specific security concerns of their organization, typical tasks include changing or extending role definitions and role hierarchies and managing security policies and data role templates. For example, enterprise IT security personnel eventually review the duties and access defined in the reference implementation and determine how that matches with the job titles and tasks the enterprise expects to be performed in the deployed Oracle Fusion application.

Provisioning of end users with role membership is defined in the application's identity store and is a configuration task to be performed by the IT security manager independent of security customization. The reference implementation contains four types of roles: abstract, job, duty, and data roles and implements hierarchies between these roles to streamline provisioning access to end users. Each of the Oracle Fusion Applications roles is implemented in Oracle Fusion Middleware as one of these roles:

- Internal roles are roles that are not assigned directly to end users, also called *application roles* because they are specific to an application.

Note that, in Oracle Fusion Applications, application roles are called *duty roles*. The Oracle Fusion security reference implementation defines a large number of duty roles that correspond to the duties of individual job roles. Duty roles are specific to applications, stored in the policy store, and shared within an Oracle Fusion Applications instance.

- External roles are roles associated with a collection of end users and other groups, also called *enterprise roles* because they are shared across the enterprise.

In Oracle Fusion Applications, enterprise roles include *job roles*, *data roles*, and *abstract roles*.

The *job role* is a role that corresponds to a job title defined in Human Resources (HR). The *duty role* is a role that corresponds to a line on a job description for that job. For example, in your enterprise, the job of an Application Developer may also include Project Management Duties. The *data role* is a role that authorizes a person with a job to a particular dimension of data on which they can work: for example, AP Manager – US Commercial Business Unit identifies who should access the accounts specific to the US division of the enterprise. The *abstract role* is a role that is not a job title, but is a means to group end users without respect to specific jobs: for example, Employee or Line Manager.

The division between internal roles and external roles is an important principle of the Oracle Fusion security approach. The principle, called *least privilege*, ensures that the end user only acquires privileges specific to the job they perform rather than a variety of miscellaneous duties. Therefore, in adherence of the principle of least privilege, duty roles are defined by Oracle Platform Security Services (OPSS) as internal roles and cannot be assigned directly to end users.

To understand the Oracle Fusion security approach in detail and to learn more about using the Oracle Fusion security infrastructure to implement and administer security for the enterprise, see the "Introduction" chapter in the *Oracle Fusion Applications Security Guide*.

## 15.3 About Extending and Securing Oracle Fusion Applications

Oracle Fusion Applications is configured by default to deny end users access to the data of the application domain and the web pages that display the data. An important principle of Oracle Fusion security ensures that end users do not have unintended access to data and application artifacts exposed in the extended application.

To enable access to custom resources in the extended application, you may create security policies to specify "who can perform what operations on what specific data and on what specific application artifacts."

---

**Note:** The term *protected* in this chapter refers to the default Oracle Fusion Applications condition that denies end users access to database resources and application artifacts. In contrast, the term *secured* refers to resources that have been made accessible to end users through security policies created for this purpose. Therefore, a security policy specifically *enables access* to the resource based on the access rights it confers to the end user.

---

To create the security policy, you must consider the additional duties the end users of the extended application will perform and then grant the desired roles specific rights to:

- Access the web pages of a custom task flow that supports the duty
- Access the specific data records, or instances of a custom business object, required to complete the duty
- Perform only those operations on that data required by the duty

When you need to secure new resources, you should expect to work with two different types of security policies: *data security policies* that control access to the data records of database tables or views in the Oracle Fusion Applications schema and *function security policies* that control access to the Oracle Fusion application artifacts used to display the data. Because the representation of data security policies and function security policies differ, the environment you will use to define security policies depends on whether data security or function security is being implemented.

In the case of access to data records, a custom business object may be secured either implicitly or explicitly. For example, the AP Manager is authorized to an explicit list of business units specified by a data role, whereas the Project Manager is implicitly authorized to the projects that he manages. When you need to secure data records, then you can:

- Implicitly grant data access to abstract and job roles through data security policies you define on custom duty roles inherited by the abstract or job role.  
You can create custom duty roles to support a new duty introduced by a custom application resource.
- Explicitly grant data access to a data role through a data security policy you apply directly to the inherited job or abstract role through a data role template.  
You can customize the data role template before running the template to generate the data roles.

### 15.3.1 Oracle Fusion Security Customization Guidelines for New Functionality

In general, when creating new functionality, not supported by Oracle Fusion Applications, you should not include authorization to that functionality from within the security artifacts that Oracle Fusion Applications delivers in the reference implementation.

Specifically, Oracle Fusion security guidelines suggest customization developers and IT security managers *should not modify* the following security artifacts in the reference

implementation when introducing *new functionality*, through custom or extended business objects.

- Predefined duty roles, specifically:
  - Do not change the role hierarchy by removing member duty roles assigned to parent duty roles or job roles.
  - Do not remove (also called *revoke*) existing privileges granted to duty roles.
  - Do not add (also called *grant*) new privileges to duty roles.
- Predefined security policies (including data and function), specifically:
  - Do not remove existing instance sets from predefined data security policies.
  - Do not remove existing member resources from predefined function security policies.
  - Do not revoke existing actions (mapped by Oracle Fusion security to resource operations) granted on each resource or instance set.

Customization developers and IT security managers *may modify* security artifacts in the reference implementation in the following ways.

- Do modify job roles to add a custom duty role (permissible by IT security manager only).
- Do modify data role templates to add a new job role as the base role or to add access privileges to a custom business object.

Customization developers and IT security managers *may create* the following security artifacts and add them to the reference implementation.

- Do create custom duty roles when a custom application resource requires a new duty role to support the segregation of duties or when a custom application resource introduces new privileges to a predefined business object.
- Do create data role templates when a custom business object is used as a data stripe and explicit data security policies grant access to the data stripe. For example, when data roles grant access to a specific business unit or organization.

---

**Note:** You should not modify predefined duty roles, and you should always add custom duty roles to grant access rights. Only the IT security manager can add or remove duty roles associated with an existing job role. If a predefined job role does not exist that adequately describes the duties performed by a job, then the IT security manager can also create a new job role.

---

### 15.3.2 Oracle Fusion Security Customization Process Overview

Creating a new, custom business object and exposing it in the extended application is one of the main customization tasks that you may perform. Although you may also extend existing business objects to introduce new functionality or to introduce additional data, the security customization process for new and existing business objects follows a similar pattern.

To security a *new* business object in the extended Oracle Fusion application:

1. Create a custom duty role to serve as the grantee of the security policy privileges.

- For details about creating duty roles, see the "Managing Security Artifacts" chapter in the *Oracle Fusion Middleware Oracle Authorization Policy Manager Administrator's Guide (Oracle Fusion Applications Edition)*.
2. Define a database resource in the Oracle Fusion Data Security repository to protect the data records of a database table that you intend to expose in the application.
- For details about registering a database table as a database resource, see [Section 15.3.6, "What You Can Customize in the Data Security Policy Store at Design Time."](#)
- This step causes Oracle Fusion security to protect the database table records, thus rendering the data inaccessible to the end user of the application. A data security policy will be required to grant access to the data defined by the database resource and a function security policy will be required to grant access to the application artifacts that display the data in the extended application.
3. Define data security policies for the previously defined database resource to grant access to specific data records for a given role.
- For details about securing data, see [Section 15.3.6, "What You Can Customize in the Data Security Policy Store at Design Time."](#)
4. Extend the data model project (in the extended application) with a new entity object to expose the database table that you defined as an Oracle Fusion Data Security database resource.
- For details about creating custom business components to represent a database table, see [Chapter 11, "Customizing and Extending ADF Application Artifacts."](#)
5. Opt into the previously defined data security policies by enabling OPSS authorization checking on the operations of individual data model objects in the data model project.
- For details about enabling security, see [Section 15.3.7, "What You Can Customize in the Data Model Project at Design Time."](#)
6. Consult an IT security manager to export all predefined function security policies of the application that you are customizing into a `jazn-data.xml` file.
- For details about how the security manager exports the application policy store, see the "Securing Oracle Fusion Applications" chapter in the *Oracle Fusion Applications Administrator's Guide*.
7. Copy the exported `jazn-data.xml` file into your application workspace.
- For details about adding the file to your application, see the "Implementing Function Security" chapter in the *Oracle Fusion Applications Developer's Guide*.
8. Customize the Oracle ADF application artifacts in the user interface project to display the data records exposed by the extended data model.
- For details about creating securable custom application artifacts, see [Chapter 11, "Customizing and Extending ADF Application Artifacts."](#)
9. Define function security policies for the custom Oracle ADF application artifacts to specify the access rights of end users.
- For details about securing application functions, see [Section 15.3.9, "What You Can Customize in the Application Security Policy Store at Design Time."](#)
10. Opt into the previously defined function security policies by running the ADF Security wizard to enable OPSS authorization checking.

For details about enabling security on the user interface project, see [Section 15.3.8, "What You Can Customize in the User Interface Project at Design Time."](#)

### 15.3.3 Oracle Fusion Security Customization Scenarios

You do not need to customize security for every type of customization that you may make in the extended application. Whether or not a security policy is needed will depend on the application resource and the type of customization performed.

[Table 15–1](#) summarizes the security customization scenarios that Oracle Fusion security supports. The "Application Developer Tasks" column of the table provides a brief description of the security artifacts involved in each scenario, but presumes some familiarity with the Oracle Fusion security approach (for guidance see [Section 15.1.1, "How to Proceed With This Chapter"](#)).

---

**Note:** For simplicity, [Table 15–1](#) does not make a distinction between explicit and implicit data security policies. You may also need to customize data role templates when a custom business object is used as a data stripe and explicit data security policies grant access to that data stripe. For more details about customizing data role templates, see [Section 15.3.6, "What You Can Customize in the Data Security Policy Store at Design Time."](#)

---

**Table 15–1 Oracle Fusion Applications Security Customization Use Cases**

Security Customization Goal	Security Policy Requirement	Application Developer Tasks
Control whether the end user associated with a particular role may access a <b>new task flow</b> and view all the web pages of the flow.	Create a new security policy. The new task flow will be inaccessible by default (also called <i>protected</i> ) and will require a new function security policy to grant end users access.	Enable ADF Security on the user interface project to protect all task flows (and the web pages they contain). Then, in the file-based policy store, create a resource definition for the task flow and assign the definition as a member of an entitlement (defined in the policy store as a <i>permission set</i> ) that you name. Then, create the security policy by granting the entitlement to a custom application role that you either created or consulted with an IT security manager to create for you.  As a security guideline, do not modify a predefined function security policy by granting additional entitlements to an predefined duty role.
Control whether the end user associated with a particular role may access a <b>customized task flow</b> and view the new or customized web pages of the flow.	Do not create a security policy. The customized Oracle Fusion application task flow will have an predefined function security policy defined by the Oracle Fusion security reference implementation; since this type of change should not introduce new duties, there is no need to grant access to a new duty role.	Consult the IT security manager who can make a customized task flow accessible to additional end users through role provisioning. If the same group of end users should have access to the customized task flow, then no change to the provisioned end users is required.

**Table 15–1 (Cont.) Oracle Fusion Applications Security Customization Use Cases**

Security Customization Goal	Security Policy Requirement	Application Developer Tasks
<p>Control whether the end user associated with a particular role may access a <b>new top-level web page</b>.</p> <p>In Oracle Fusion Applications, a top-level web page is one that is not contained by a task flow.</p>	<p>Create a new security policy.</p> <p>The new top-level web page will be inaccessible by default (also called <i>protected</i>) and will require a new function security policy to grant end users access.</p> <p>The ability to secure individual web pages in Oracle Fusion Applications is reserved for top-level web pages backed by an ADF page definition file only.</p>	<p>Enable ADF Security on the user interface project to protect all top-level web pages backed by ADF page definition files. Then, in the file-based policy store, create a resource definition for the web page and assign the definition as a member of an entitlement (defined in the policy store as a <i>permission set</i>) that you name. Then, create the security policy by granting the entitlement to a custom application role that you either created or consulted with an IT security manager to create for you.</p> <p>As a security guideline, do not modify a predefined function security policy by granting additional entitlements to an predefined duty role.</p>
<p>Control whether the end user associated with a particular role may access a <b>customized top-level web page</b>.</p> <p>In Oracle Fusion Applications, a top-level web page is one that is not contained by a task flow.</p>	<p>Do not create a security policy.</p> <p>The customized top-level web page will have an predefined function security policy defined by the Oracle Fusion security reference implementation; since this type of change should not introduce new duties, there is no need to grant access to a new duty role.</p>	<p>Consult the IT security manager who can make customized top-level web pages accessible to additional end users through role provisioning. If the same group of end users should have access to the web page, then no change to the provisioned end users is required.</p>
<p>Determine whether the end user associated with a particular role has the right to select <b>create, edit, or delete button</b> in the displayed web page.</p>	<p>Do not create a security policy.</p> <p>Access to user interface components, such as buttons, is not controlled by a security policy, but can be controlled by rendering the button in the user interface based on the end user's role.</p>	<p>Conditionally render the component by entering ADF Security Expression Language (EL) utility methods on the rendered attribute of the button to test whether the end user has membership in a particular role.</p>
<p>Control whether the end user associated with a particular role may view or update a <b>specific set of data records for an all new business object</b> in the displayed web page.</p>	<p>Create a new security policy.</p> <p>After an Oracle Fusion Database Security database resource is defined for the data, the data records exposed by the new business object will be inaccessible by default (also called <i>protected</i>) and will require a new data security policy to grant end users read or update access on one or more specific sets of data records.</p>	<p>Enable authorization checking on the appropriate operations of the ADF entity object (read, update, and removeCurrentRow) that maps to a specific database table. Then, in the Oracle Fusion Data Security repository, add a custom duty role as the grantee of access privileges and create a named instance set of data records. Then, create the security policy by granting Oracle Fusion Data Security view or update privileges to the custom duty role for the data records.</p>
		<p>As a security guideline, do not modify a predefined data security policy by granting additional privileges to an predefined duty role.</p>

**Table 15–1 (Cont.) Oracle Fusion Applications Security Customization Use Cases**

Security Customization Goal	Security Policy Requirement	Application Developer Tasks
<p>Control whether the end user associated with a particular role may view or update <b>new set of data records for an existing business object</b> in the customized web page.</p>	<p>Create a new security policy.</p> <p>Although an existing Oracle Fusion business object will have an existing data security policy; you should not modify privileges granted to predefined duty roles (those defined by the Oracle Fusion security reference implementation) and should instead grant only to custom duty roles that they define.</p>	<p>In the Oracle Fusion Data Security repository, add a custom duty role as the grantee of access privileges and create a named instance set for the new data records. Then, create the security policy by granting Oracle Fusion Data Security view or update privileges to the custom duty role for the data records.</p> <p>As a security guideline, do not modify a predefined data security policy by granting additional privileges to an predefined duty role.</p>
<p>Control whether the end user associated with a particular role may view or update <b>new sensitive data</b> exposed on a new attribute of an existing business object in the customized web page.</p> <p><i>Sensitive data</i> is defined as any personally identifiable information (PII) that is considered "public within the enterprise" (also called "internally public"). Internally public PII data is secured from access external to the enterprise.</p>	<p>Create a new security policy.</p> <p>Sensitive PII data exposed by a new attribute that is added to an existing Oracle Fusion application business object will be secured by the business object's data security policies and will require a new data security policy to grant end users read or update access on a specific column of data.</p>	<p>Column-level OPSS authorization checking is not supported for ADF entity objects. Instead create a custom OPSS permission to control access to the column read or update operation, and then, in the Oracle Fusion Data Security repository, map the operation to a custom privilege and grant the privilege to the custom duty roles for the sensitive data records.</p> <p>Last, conditionally render the attribute by testing whether the end user has the custom privilege either 1.) by entering an ADF Security Expression Language (EL) utility method using an EL expression on the user interface component that displays the attribute or 2.) by entering a groovy expression on the ADF view object to which the user interface component is bound.</p>
<p>Control whether the end user associated with a particular role may view or update <b>new confidential data</b> exposed on an all new business object in the customized web page.</p> <p><i>Confidential data</i> is defined as any personally identifiable information (PII) that is considered "private within the enterprise". Exposure of such information outside the enterprise could result in harm, such as loss of business, benefit to a competitor, legal liability, or damaged reputation.</p> <p>Confidential PII data is secured from access external to the enterprise and is secured additionally to prevent access within the enterprise by highly privileged end users (such as database administrators).</p>	<p>Create a new security policy.</p> <p>In Oracle Database, the Virtual Private Database (VPD) feature only supports securing a set of data records and therefore will require a new table in the Oracle Fusion database schema. The confidential PII data exposed by the new business object will be inaccessible by default (also called <i>protected</i>) and will require a new data security policy to grant end users read or update access on a specific set of data records.</p>	<p>Column-level policies are not supported by Virtual Private Database (VPD). Instead the database administrator must create a new table in the Oracle Fusion database schema, create a view for that table, and then define a VPD policy to filter the PII data records by associating a PL/SQL function with that view.</p> <p>Then, in the Oracle Fusion Data Security repository, create an action with the same name as the database view and create the security policy by granting Oracle Fusion Data Security view or update privileges to the custom duty role for the confidential data records.</p> <p>Last, in the data model project, enable OPSS authorization checking on the appropriate operations of the ADF entity object (<code>read</code>, <code>update</code>, and <code>removeCurrentRow</code>) that maps to the new PII database table.</p>

### 15.3.4 Scenarios Related to Extending and Securing Data Model Components

In Oracle Fusion Applications, when you want to extend the application to expose additional data, you create an ADF entity object and implement the operations that may be performed over a particular set of data records. The ADF entity object you create encapsulates the data as business object instances, corresponding to data records from a database table or view, such as an invoice or a purchase order. Typical operations are business functions like viewing, editing, or creating an instance of the business object.

Security concerned with controlling the operations that can be performed against specific data is called *data security*. Data security policies involve granting an end user, by means of the end user's membership in a role, the ability to perform operations on specific sets of data. For example, an accounts payable manager in the enterprise's western regional office may be expected to view and edit invoice data records but only for the customers in the western region. The Accounts Payable Manager role provisioned to the accounts payable manager authorizes access to the business functions required to view and edit invoices instances, and, in this case, the specific instances of the invoices business object striped for the western region.

Data security policies are implemented using Oracle Fusion Data Security, which is the technology that implements the security repository for data security policies. Oracle Fusion Data Security is implemented as a series of Oracle Fusion Applications database tables, sometimes referred to as *FND tables* (note that FND refers to resources in foundation tables) and includes tables like *FND\_OBJECTS* that defines the protected database resource and *FND\_GRANTS* that defines the access privileges for those database resources.

To protect the business object in the extended application, where it has been exposed as an ADF entity object, a database resource definition in the *FND\_OBJECTS* table identifies the same table or view backing the ADF entity object. The *database resource* in Oracle Fusion Data Security is the data resource on which data security is enforced. Once the business object is defined as an Oracle Fusion Data Security database resource, then a security policy must be created to grant access to the data records. The security policies for the database resource specify access privileges such as read, update, and delete privileges on specific sets of data records exposed by the business object.

---

**Note:** When an ADF entity object exposes a business object that does *not* require security, then no database resource for that business object should be defined in the Oracle Fusion Data Security repository. For complete details about Oracle Fusion Data Security, see the "Implementing Oracle Fusion Data Security" chapter in the *Oracle Fusion Applications Developer's Guide*.

---

As an Oracle Fusion security guideline, a new data security policy should be created instead of modifying predefined data security policies of the Oracle Fusion security reference implementation. For example, a new data security policy is required to expose additional data records or operations for an existing business object. Additionally, a custom duty role must be created as the recipient of the new data security access privileges since granting privileges to a predefined duty role would alter the segregation of duties defined by the reference implementation.

---

**Note:** Developers are not entitled to modify the role hierarchy defined by the Oracle Fusion security reference implementation. Therefore, whenever you create a new duty role, you must consult the IT security manager to assign the custom duty role to a job role or data role.

---

Additionally, the Oracle Fusion security reference implementation uses database-level security policies to protect most of the confidential *personally identifiable information* (PII), also called internally private data, that exists in the Oracle Fusion database schema. This type of security is implemented in Virtual Private Database (VPD) policies directly on the PII tables. In general, database administrators and other personnel with access to the database schema should not modify VPD policies implemented for Oracle Fusion Applications. However, when you create a business object that introduces confidential data and that data should be treated as internally private within the enterprise, then certain roles may be granted access to the confidential data for valid business reasons. For example, a human resources representative may require access to the employee's home addresses, while a dispatcher may require access to the home phone numbers of on-call staff.

Whether or not you will need to define a data security policy to grant access to data records depends on the type of customization, as summarized in [Table 15-1](#). The scenarios for defining data security policies include the following.

**When a new business object is introduced and it needs to be secured:**

When you seek to secure additional data records in the extended application because a new ADF entity object is introduced, then an Oracle Fusion Data Security database resource must be defined to protect the data records and a new data security policy must be created to grant end users access to the data records exposed by the business object that the ADF entity object defines. The data records exposed by the business object will be unprotected (accessible to all end users) until a database resource identifying the business object is defined in the Oracle Fusion Data Security repository.

Note that the operations to be secured on the new business object will also require enabling OPSS authorization checking for those operations on the ADF entity object in the data model project, as described in [Section 15.3.7, "What You Can Customize in the Data Model Project at Design Time."](#)

**When a new business object attribute is introduced and it maps to sensitive data:**

When you modify an existing ADF entity object to include a new attribute that maps to data that not all end users should be able to view, then a new data security policy must be defined to grant end users access to the sensitive data. This is accomplished through a combination of a data security policy that grants a custom privilege and enforcement of the privilege in the application source.

Because Oracle Fusion Data Security does not support automatic enforcement of custom data security privileges, column-level security is not supported by default. You enforce the custom privilege in the application source by enabling OPSS authorization checking at the level of the user interface component or its databound ADF view object. Otherwise, without the custom data security privilege and custom privilege check, the data records (including the sensitive fields) exposed by the business object would be secured by the data security policy that already exists for the business object.

---

**Important:** Oracle Fusion Data Security alone will not prevent sensitive data from being accessed by highly privileged end users, such as database administrators. If the data needs to be treated as internally private (confidential data), then consider implementing additional security using Virtual Private Database (VPD) policies. However, do not implement column-level VPD policies to protect sensitive data exposed by attributes, as security for attributes is not supported by VPD in Oracle Fusion Applications.

---

**When a new business object attribute is introduced and it maps to confidential data:**

When you create an ADF entity object that introduces data that should be treated as confidential to the enterprise, then row-level VPD policies may be defined to control access to PII data by privileged users, including database administrators.

Implementing VPD policies requires saving the confidential information in a new table in the Oracle Fusion database schema.

In this case, the database administrator first creates the database table and the VPD policy to secure the PII data records. The VPD policy the database administrator creates associates a policy function (a PL/SQL function) with a particular database view or synonym. The policy function filters the rows for any query made against the PII data. Finally, you can proceed to create the actual data security policies by granting to an action that has been created with same name as the database view where the policy is defined.

For information about creating VPD policies, see the "Using Oracle Virtual Private Database to Control Data Access" chapter in the *Oracle Database Security Guide*.

**When new operations or new data records are introduced from an already secured business object:**

When you introduce new operations or additional data records exposed by an existing ADF entity object into the extended application, you should not modify the predefined data security policies or data role templates that already exist for that business object. Instead you should create a new data security policy to grant end users access to the operations or data records that had previously remained protected.

Note that the operations to be secured on the business object may also require enabling OPSS authorization checking for those operations on the ADF entity object in the data model project, as described in [Section 15.3.7, "What You Can Customize in the Data Model Project at Design Time."](#)

**When already exposed operations or data records should be accessible by additional end users:**

When you introduce functionality into the extended application that changes the access requirements of the operations and data records exposed by an existing business object, then those end users may be provisioned by existing job roles or data roles. You should consult the IT security manager to make the data accessible to additional end users through role provisioning. This type of customization does not require modifying the access privileges or the duty roles of an associated data security policy.

### 15.3.5 Scenarios Related to Extending and Securing User Interface Artifacts

When you want to extend an Oracle Fusion application user interface to support particular end user duties, you may either create a new ADF bounded task flow or customize an existing bounded task flow. The bounded task flow specifies the control flow that the end user is expected to follow when interacting with the web pages contained by the task flow. Similarly, top-level web pages (ones that are *not* contained by a bounded task flow) may be introduced or customized.

Security concerned with controlling access to a bounded task flow or top-level web page is called *function security*. Function security policies involve granting an end user, by means of the end user's membership in a role, the ability to access task flows and perform operations in the contained web pages. For example, the accounts payable manager must be granted access privileges to the task flow that provides the functions to manage the invoice data records. If the manager is authorized to access the task flow, then a data security policy governing the invoice records will determine the manager's right to access the actual data.

Function security is implemented at the most fundamental level as resource / action pairs which may be granted to secure specific application artifacts. Oracle ADF defines the actions needed to secure certain Oracle ADF application artifacts, including ADF bounded task flows and, in the case of top-level web pages, ADF page definitions files.

In the Oracle Fusion Applications environment, function security policies aggregate one or more resource /action pairs into an entitlement definition. The entitlement is the entity that is granted to a duty role. The function security policy for the Oracle ADF application artifact, confers the end user with function access rights, such as a such as view or manage, through a specific duty role.

The function security policies for all the resources of the Oracle Fusion application form the function security repository, which is implemented as an OPSS application policy store. The OPSS policy store in a test or production environment is an LDAP server running Oracle Internet Directory (OID). At runtime, OPSS performs authorization checks against the application policy store to determine the end user's access privileges.

---

**Note:** For more information about how Oracle Platform Security Services implements function security, see Part I "Understanding Security Concepts" in *Oracle Fusion Middleware Application Security Guide*.

---

The IT security manager for the enterprise exports the LDAP-based application policy store for a particular Oracle Fusion application into an XML file-based policy store that allows you to add security policies using the tools provided by JDeveloper. As an Oracle Fusion security guideline, you must create a new function security policy rather than modify the predefined function security policies of the Oracle Fusion security reference implementation. Additionally, a custom duty role must be created as the recipient (also called the *grantee*) of the new function security access privileges since granting privileges to a predefined duty role would alter the segregation of duties defined by the reference implementation.

---

**Note:** Developers are not entitled to modify the role hierarchy defined by the Oracle Fusion security reference implementation. Therefore, whenever you create a new duty role, you must consult the IT security manager to assign the custom duty role to a job role.

---

Whether or not you will need to create a function security policy to grant access to a task flow or top-level web page depends on the type of customization, as summarized in [Table 15–1](#). The scenarios for defining function security policies include the following.

**When a new task flow or top-level web page is introduced:**

When you expose new functionality in the extended application through a new ADF bounded task flow or top-level web page that you create, then a new function security policy must be created to grant end users access to the application artifact.

The new ADF bounded task flow or top-level web page are the only use cases that require a new function security policy for the extended application.

**When a new web page is introduced into an existing task flow:**

When you modify an existing task flow to include new web pages, those web pages will be secured by the containing task flow's existing security policy. In this case, because all web pages contained by a bounded task flow are secured at the level of the task flow, there is no need to add additional function security privileges specifically for the new page. You will, however, need to create a new data security policy to grant end users access to any new data records that were introduced by the customization.

**When a web page is modified to display a new field of sensitive data:**

When you modify a web page to display sensitive data for a single data record field (for example, by adding a column to a table component to display salary information), access to the field displayed by the component cannot be controlled by a function security policy (authorization checking is not implemented by OPSS at the level of ADF Faces user interface components in the web page). Instead, you enter ADF Security Expression Language (EL) utility methods on that part of the databound ADF Faces component responsible for rendering the field and test the end user's associated role.

Note that using EL expressions to conditionally render a portion of a user interface component does not control access to the actual data; truly sensitive data should be secured on the business object with a data security policy, as described in [Section 15.3.4, "Scenarios Related to Extending and Securing Data Model Components."](#)

**When a web page is modified to display components that should not be viewable by all end users:**

When you modify a web page to display components that not all end users should be able to view (for example, a button that deletes data records), access to the components cannot be controlled with a function security policy (authorization checking is not implemented by OPSS at the level of ADF Faces user interface components in the web page). Instead, you enter ADF Security Expression Language (EL) utility methods on the rendered property of the ADF component in order to hide or render the entire component based on the end user's associated role.

Note that using EL expressions to conditionally render a user interface component does not control access to the actual data (if that component displays data); truly sensitive data should be secured on the business object with a data security policy, as described in [Section 15.3.4, "Scenarios Related to Extending and Securing Data Model Components."](#)

**When existing task flows or top-level web pages should be accessible by additional end users:**

When you introduce functionality into the extended application that changes the access requirements of an existing bounded task flow or top-level web page, then you should consult the IT security manager to make the resource accessible to additional end users through role provisioning. This type of customization does not require changing the access privileges associated with the resource or the duties it defines.

### 15.3.6 What You Can Customize in the Data Security Policy Store at Design Time

Data security policies are stored in the Oracle Fusion Data Security repository and are defined and edited using Oracle Authorization Policy Manager, which you access through Oracle Fusion Functional Setup Manager, from the **Manage Data Security** task available in the Setup and Maintenance area of any Oracle Fusion Setup application.

---

**Note:** After you select the **Manage Data Security** task in Oracle Fusion Functional Setup Manager, the environment redirects to the data security customization user interface provided by Oracle Authorization Policy Manager. In this document, although the data security customization tool is identified as Oracle Authorization Policy Manager, be aware that the tool must be accessed through Oracle Fusion Functional Setup Manager.

---

Data security policies control access to the database resources of an enterprise. Database resources in the Oracle Fusion security reference implementation include database tables and views and are predefined standard business objects that should not be changed. However, for cases where custom database resources must be secured business objects (defined by ADF entity objects in the data model project), you can be entitled to create custom duty roles, manage database resources, and create new data security policies using Oracle Authorization Policy Manager.

---

**Important:** As an Oracle Fusion security guideline, the privileges granted by predefined data security policies assigned to duty roles of the reference implementation should not be changed by customization developers. You should always create new data security policies to confer additional access privileges. Details about the Oracle Fusion security reference implementation can be found in the Oracle Fusion Applications security reference manuals.

---

The data security policy consists of privileges conditionally granted to a role in order to control access to instance sets of the business object. A privilege is a single action corresponding to an end user's intended operation on a single business object. A data security policy therefore is a grant of a set of privileges to a role on a business object for a given instance set. You can define the instance sets as a single row of data, multiple rows of a single table, or all rows of a single table.

The following security artifacts are recorded in the Oracle Fusion Data Security repository for a new data security policy:

- A database resource that references a primary key corresponding to the database table or view of the business object on which data security will be enforced.

After the database resource is defined in the data security repository, the Oracle Fusion Data Security implementation protects the data records and operations exposed by the business object by default, and a data security policy must be defined to grant end users access to the business object.

- One or more roles that will be assigned to the end users who can perform the granted actions.

For more details about the roles used by Oracle Fusion Applications, see [Section 15.2, "About Extending the Oracle Fusion Security Reference Implementation."](#)

- A rule (also called a *named condition*) to define the available row instance sets in the form of a SQL predicate or simple filter (stored as XML) defined on the rows of the database resource.

Instance sets may be a single row of data, multiple rows of a single table, or all rows of a single table. Only instance sets with multiple rows requires creating a named condition.

- One or more actions (such as view, edit, and delete) performed on database records that correspond to the operations supported by the business object (which may include custom operations).

At runtime, data security policies make data available to end users based on their provisioned roles according to the following means:

- Action grants that determine whether the end user has the right to perform the intended operation
- Condition evaluation for individual actions (and its corresponding operation) that specify the which data records from the database resource may be accessed

---

**Note:** The application developer does not enforce data security policies when creating the policies. In the case of data security, you must enable OPSS authorization checking on each business object that needs data security. This enforcement is implemented in JDeveloper, as described in [Section 15.3.7, "What You Can Customize in the Data Model Project at Design Time."](#)

---

Related to data security is an Oracle Fusion security feature called the data role template. Oracle Fusion Applications supplies *data role templates* to anticipate typical Oracle Fusion security scenarios and to allow the enterprise to generate data security policies based on information that is specific to the enterprise, such as the names of business units on which to apply the data security policies. Typically, the implementation manager for Oracle Fusion Applications enters the template information and then runs the templates to generate data security policies and the supporting data roles.

When you create a new business object or expose a new set of data records in the extended application, you should confirm whether a data role template exists to generate data security policies for that business object. If a data role template exists, you can update the template to supply information pertaining to the business object, such as the data records to secure and the data dimensions to express stripes of data, such as territorial or geographic information used to partition enterprise data.

Using Oracle Authorization Policy Manager, you may perform the following data security-related customization tasks:

- Manage database resources.

An existing database resource should not have its primary key altered, but you can define new named conditions and add new actions to map any new operations that you implement. If you create a new business object for a database table or view, you can create an all new database resource with named conditions (see below) and actions.

- Create named conditions to filter the rows of the business object. (Optional)

The database resource conditions are specified as SQL queries that, when added to a security policy, filter the data and generate an instance set of available data records. Conditions determine the entitlements available to the end user for specific business objects. Conditions may be static or they may be parameterized to allow instance sets to be specified generically but granted specifically. Note a condition is only required when the data security policy does not secure either a single data record or all data records: both of these cases may be defined without named conditions when creating the security policy.

Note that instance sets generated with parameters cannot be used for data security that is enforced declaratively, rather you need to write code to enforce OPSS authorization checking.

- Create data security policies consisting of privileges for a specific application role, named condition (optional), and business object.

A privilege can map a standard action to a standard operation: read, update, and delete on a condition of a business object. The standard actions and the standard operations are named similarly.

Alternatively, a privilege can map a custom action to a custom operation on a condition of a business object. The custom privilege, for example ApprovePO, is useful to secure a custom operation in the data model project or to secure any operation for row sets at the level of the individual ADF view object. The custom privilege also supports securing operations on columns through ADF Security Expression Language (EL) utility methods in the user interface project or Groovy scripting language expressions in the data model project.

As an alternative to specifying a named condition, the data security policy can secure an instance set defined by a single data record or defined by all data records. Both of these cases may be selected when creating the data security policy.

- Generate data security policies by updating a data role template with data dimensions and data sets required to support the business object.

A data role template generates data security policies for a business object based on supplied data dimensions to partition the data records into sets of data security policies. The template also maps instance sets for the data security policies it will generate to a particular data dimension. Instance sets are authored at the time the business object is registered as a database resource. Data dimensions and instance sets are specified as SQL clauses.

Note that the SQL clauses cannot be modified after running the template.

For an overview of these tasks, see [Section 15.4, "Defining Data Security Policies on Custom Business Objects."](#) For detailed documentation, see the "Managing Oracle Fusion Applications Data Security Policies" and "Oracle Fusion Applications Data Role Templates" chapters in *Oracle Fusion Middleware Oracle Authorization Policy Manager Administrator's Guide (Oracle Fusion Applications Edition)*.

### 15.3.7 What You Can Customize in the Data Model Project at Design Time

You create a data model project in JDeveloper to map custom business objects to ADF entity objects. At runtime, the ADF entity object creates a row set of data records exposed by the business object and simplifies modifying the data by handling create, read, update, and delete operations. In the data model project, you then define one or more ADF view objects on top of the ADF entity object to shape the data to the row set required by the tasks of the application, such as populating a form that displays a customer's sales invoice.

After you map the business object to an ADF entity object, enforcement of data security policies does not occur automatically on the data records of the exposed business object. The Oracle Fusion security approach protects the business object that has been registered as an Oracle Fusion Data Security database resource to ensure that end users do not have unintended access to sensitive data. In adherence of the security principle of protected by default, Oracle Fusion security separates defining policies and enforcing policies. Thus, by default, data security policies for a business object will remain ineffective until you enable OPSS authorization checking on the operations of the ADF business component. Enforcement of OPSS authorization checking can be specified either declaratively, at the level of ADF entity objects or ADF view objects, or programmatically, on any related code.

You can modify the data model project to opt into data security in two ways:

- At the level of the ADF entity object, to enable OPSS authorization checking on standard operations. Standard operations supported by ADF entity objects include, read, update, and delete current row. In this case, all ADF view objects based on the ADF entity object will have the same level of authorization checking enabled. The applicable data security policies will filter the data for each row set produced by these ADF view objects in exactly the same way.
- At the level of the ADF view object, to enable OPSS authorization checking on standard operations for a collection of rows. This provides a way to filter the data in the data model project based on an individual row set that the ADF view object defines. This level of authorization checking also supports defining a custom privilege (corresponding to the ADF view object read operation) in the data security policy store.

Using JDeveloper, you can perform the following security-related customization tasks in the data model project:

- Enforce row-level security for standard operations.

Standard operations that you can secure are read, update, and remove current row. OPSS authorization checking is enabled directly on the ADF entity object to be secured. Although the ADF entity object maps to all instances of the business object, the data security policy defines conditions to filter the rows displayed to the end user.

- Enforce row-level security for custom operations.

You may wish to enforce security for custom operations that are specific to the custom business object. Custom operations are not supported by ADF Business Components on the ADF entity object. When a data security policy defines a custom operation, you must enable it using a view criteria set on an ADF view object. The view criteria identifies the data security policy and business object.

- Enforce security for individual attributes of business objects.

Column-level OPSS authorization checking is not supported on the attributes of ADF entity objects or ADF view objects. You must create a custom OPSS

permission for the column-level read or update operation and then map that to a custom privilege. Whether or not the user interface displays the column is determined by testing that custom privilege in the user interface using an EL expression on the secured attribute displayed by the user interface component.

For an overview of these tasks, see [Section 15.5, "Enforcing Data Security in the Data Model Project."](#) For detailed documentation, see the "Implementing Oracle Fusion Data Security" chapter in the Oracle Fusion Applications Developer's Guide.

### 15.3.8 What You Can Customize in the User Interface Project at Design Time

Before you create function security policies, you will use JDeveloper to create a user interface project with the custom ADF bounded task flows or top-level web pages that you intend to secure.

To simplify the task of securing the functions of the extended application, ADF Security defines a containment hierarchy that lets you define a single security policy for the ADF bounded task flow and its contains web pages. In other words, the security policy defined at the level of the bounded task flow, secures the flow's entry point and then all pages within that flow are secured by the same policy. For example, a series of web pages may guide new end users through a registration process and the bounded task flow controls page navigation for the process.

Specifically, the Oracle ADF application artifacts that you may secure in the user interface project of the extended Oracle Fusion application are:

- ADF bounded task flow protects the entry point to the task flow, which in turn controls the end user's access to the pages contained by the flow

The ADF unbounded task flow is not a securable application artifact and thus does not participate in OPSS authorization checks. When you need to secure the constituent pages of an unbounded task flow, you define policies for the page definition files associated with the pages instead.

- ADF page definition files associated with top-level web pages

For example, a page may display a summary of products with data coordinated by the ADF bindings of the page's associated ADF page definition file.

For details about creating bounded task flows and databound top-level web pages, see the "Introduction to Building Fusion Web Applications with Oracle ADF" chapter in the *Oracle Fusion Middleware Fusion Developer's Guide for Oracle Application Development Framework*.

Although you can create function security policies for the custom resources of the user interface project, enforcement of function security does not occur automatically. The Oracle Fusion security approach protects securable Oracle ADF application resources to ensure that end users do not have unintended access. In adherence of the security principle of protected by default, Oracle Fusion security separates defining policies and enforcing policies. Thus, by default, function security policies will remain ineffective until you enable OPSS authorization checking by running the ADF Security wizard in JDeveloper on the user interface project.

---

**Important:** After you run the ADF Security wizard, OPSS authorization checking is enforced on the bounded task flows and top-level pages. These application artifacts will be inaccessible when testing the application in JDeveloper. To enable access, you must create function security policies on the protected application artifacts, as described in [Section 15.3.9, "What You Can Customize in the Application Security Policy Store at Design Time."](#)

---

Using JDeveloper, you can perform the following security-related customization tasks in the user interface project:

- Enable OPSS authorization checking to protect Oracle ADF application artifacts.  
Oracle ADF application artifacts in the user interface project, including ADF bounded task flows and the top-level web pages (with a backing ADF page definition) will be protected when you configure ADF Security by running the ADF Security wizard with the **Authentication and Authorization** option selected. This ensures that end users do not have unintended access to sensitive work flows of the extended application.
- Conditionally display or hide components in the web page.  
ADF Security implements utility methods for use in EL expressions to access Oracle ADF application artifacts in the security context. For example, you can use the ADF Security utility methods to determine whether the end user is allowed to access create, edit, or delete buttons. Good security practice dictates that your application should hide user interface components and capabilities for which the end user does not have access. For example, if the end user is not allowed access to a particular task flow, you can use the EL expression to evaluate the role membership of the end user to determine whether or not to render the navigation components that initiate the task flow.

For an overview of these tasks, see [Section 15.6, "Defining Function Security Policies for the User Interface Project."](#) For detailed documentation, see the "Implementing Function Security" chapter in the *Oracle Fusion Applications Developer's Guide*.

### 15.3.9 What You Can Customize in the Application Security Policy Store at Design Time

You can use JDeveloper to add application security policies to a file-based policy store that the IT security manager creates by exporting policies from the LDAP-based application security policy store. The file containing the exported policy store is the `jazn-data.xml` file.

As a security development guideline, you should only use JDeveloper tools to work on the exported file-based policy store, and you should not edit the security definitions directly. JDeveloper supports iterative development of security so you can easily create, test, and edit security policies that you create for Oracle ADF application artifacts. In JDeveloper, you can also create end user identities for the purpose of running and testing the application in JDeveloper's Integrated WebLogic Server. You provision a few test end user identities with roles to simulate how the actual end users will access the secured application artifacts.

After testing in JDeveloper using Integrated WebLogic Server, you must consult with the IT security manager to merge the LDAP-based application policy store in the staging environment with the security policies that you added to the exported XML file. Initially, the staging environment allows further testing using that server's identity store before deploying to the production environment. Thus, end user identities

created in JDeveloper are not migrated to standalone Oracle WebLogic Server and are used only in Integrated WebLogic Server to test the extended application.

---

**Note:** For details about implementing and testing security using JDeveloper, see the "Implementing Function Security" chapter in the *Oracle Fusion Applications Developer's Guide*.

---

The basic security artifact for function security is the JAAS (Java Authentication and Authorization Service) permission, where each permission is specific to a resource type and maps the resource with an allowed action. In general, the JAAS permission determines the allowed operations that the end user may perform on a particular application artifact. However, from the standpoint of Oracle Fusion Applications, end users typically need to interact with multiple resources to complete the duties designated by their provisioned roles. To simplify the task of creating function security policies in the Oracle Fusion Applications environment, you work with OPSS entitlements to grant privileges for a variety of securable resources, including ADF task flows, web services, and SOA work flows to a role.

Function security policies that comprise entitlement grants with multiple application artifacts are called *entitlement-based policies*. [Example 15–1](#) shows the Oracle Fusion Applications entitlement policy Maintain Purchase Orders which groups the OPSS permissions for ADF task flows, a web service, and a SOA work flow.

***Example 15–1 Entitlement-Based Policy Groups OPSS Permissions as a Set that May Be Granted to a Role***

Resource Type: ADF Taskflow

Resource: PO Summary

Action: view

Resource Type: ADF Taskflow

Resource: PO Details

Action: view

Resource Type: ADF Taskflow

Resource: Supplier Details

Action: view

Resource Type: Web Service

Resource: SpendingLimitCheckWS

Action: invoke

Resource Type: Workflow

Resource: POApproval

Action: submit

You use the security policy editor in JDeveloper to create the entitlement-based policy. JDeveloper modifies the source in the exported XML file. As [Example 15–2](#) shows, entitlement-based policies in Oracle Fusion applications are defined in the `<jazn-policies>` element. The policy store section of the file contains a `<resource-type>` definition (that identifies the actions supported for resources of the selected type), a `<resource>` definition (to identify the resource instance that you selected from your application and mapped to a resource type), a `<permission-set>` definition (to define the resources and actions to be granted as an entitlement), and a `<grant>` definition with one or more entitlements (defined in the XML as a permission set) granted to the desired application roles (the grantee).

**Example 15–2 Entitlement-Based Security Policy Definition in jazn-data.xml File**

```

<?xml version="1.0" ?>
<jazn-data>
  <policy-store>
    <applications>
      <application>
        <name>MyApp</name>

        <app-roles>
          <app-role>
            <name>AppRole</name>
            <display-name>AppRole display name</display-name>
            <description>AppRole description</description>
            <guid>F5494E409CFB11DEBFEB11296284F58</guid>
            <class>oracle.security.jps.service.policystore.ApplicationRole</class>
          </app-role>
        </app-roles>

        <role-categories>
          <role-category>
            <name>MyAppRoleCategory</name>
            <display-name>MyAppRoleCategory display name</display-name>
            <description>MyAppRoleCategory description</description>
          </role-category>
        </role-categories>

        <!-- resource-specific OPSS permission class definition -->
        <resource-types>
          <resource-type>
            <name>APredefinedResourceType</name>
            <display-name>APredefinedResourceType display name</display-name>
            <description>APredefinedResourceType description</description>
            <provider-name>APredefinedResourceType provider</provider-name>
            <matcher-class>oracle.security.jps.ResourcePermission</matcher-class>
            <actions-delimiter>,</actions-delimiter>
            <actions>write,read</actions>
          </resource-type>
        </resource-types>

        <resources>
          <resource>
            <name>MyResource</name>
            <display-name>MyResource display name</display-name>
            <description>MyResource description</description>
            <type-name-ref>APredefinedResourceType</type-name-ref>
          </resource>
        </resources>

        <!-- entitlement definition -->
        <permission-sets>
          <permission-set>
            <name>MyEntitlement</name>
            <display-name>MyEntitlement display name</display-name>
            <description>MyEntitlement description</description>
            <member-resources>
              <member-resource>
                <type-name-ref>APredefinedResourceType</type-name-ref>
                <resource-name>MyResource</resource-name>
                <actions>write</actions>
              </member-resource>
            </member-resources>
          </permission-set>
        </permission-sets>
      </application>
    </applications>
  </policy-store>
</jazn-data>

```

```
</member-resources>
</permission-set>
</permission-sets>

<!-- Oracle function security policies -->
<jazn-policy>
    <!-- function security policy is a grantee and permission set -->
    <grant>
        <!-- application role is the recipient of the privileges -->
        <grantee>
            <principals>
                <principal>
                    <class>
                        oracle.security.jps.service.policystore.ApplicationRole
                    </class>
                    <name>AppRole</name>
                    <guid>F5494E409CFB11DEBFEB11296284F58</guid>
                </principal>
            </principals>
        </grantee>
        <!-- entitlement granted to an application role -->
        <permission-set-refs>
            <permission-set-ref>
                <name>MyEntitlement</name>
            </permission-set-ref>
        </permission-set-refs>
    </grant>
</jazn-policy>
</application>
</applications>
</policy-store>
<jazn-policy></jazn-policy>
</jazn-data>
```

While OPSS permissions granted for a single resource are not typically defined in the Oracle Fusion Applications environment, function security policies that use OPSS permissions for a single resource are called *resource-based policies*. Ultimately, a function security policy may have either one or more OPSS permissions, one or more OPSS permission sets (entitlements), but not both.

---

**Note:** Granting access to web pages in Oracle Fusion Applications is enforced at the level of ADF Controller components called *bounded task flows*. Task flows in Oracle Fusion Applications are ADF Controller components that assemble the application's web pages (or regions within a web page) into a work flow that supports the tasks to be performed by application end users. Defining security policies on task flows instead of individual web pages is a security best practice that blocks end users from directly accessing the pages of a task flow. Web pages that are not contained in a task flow, are top-level pages and may have security policies defined individually.

---

Provisioning of end users with role membership is defined in the application's identity store and is a configuration task to be performed by the IT security manager independent of security customization.

Using JDeveloper, you may perform the following function security customization tasks:

- Create an entitlement-based policy for all other application roles.  
An entitlement-based policy is a set of resource grants (set of OPSS permissions) that will be required by the end user to complete a task.
- Create a resource-based policy specifically for the built-in OPSS application role authenticated-role.  
A resource-based policy sets an OPSS permission on a single application resource and grants that permission to an application role. This type of function security is typically not used by securable resources in Oracle Fusion Applications. However, the resource-based policy should be used to make a custom resource accessible only to authenticated end users (ones who visit the site and logs in). For example, granting a view action permission to the built-in OPSS application role authenticated-role is the way to make an employee registration task flow accessible to all employees within the enterprise.

For an overview of these tasks, see [Section 15.6, "Defining Function Security Policies for the User Interface Project."](#) For detailed documentation, see the "Implementing Function Security" chapter in the *Oracle Fusion Applications Developer's Guide*.

### 15.3.10 What You Cannot Do with Security Policies at Design Time

After you create the security policies, you should work with an IT security manager to migrate the policies to the staging environment.

The security manager is responsible for the following tasks.

- After testing is completed in JDeveloper, the IT security manager must merge the file-based policy store with the application policy store in the staging environment.  
For information about how the IT security manager merges the policies using Oracle Authorization Policy Manager, see the "Upgrading Oracle Fusion Applications Policies" chapter in the *Oracle Fusion Middleware Oracle Authorization Policy Manager Administrator's Guide (Oracle Fusion Applications Edition)*.
- The IT security manager must provision enterprise users by mapping enterprise roles (defined in the staging environment identity store) to the custom application roles.  
For information about how the IT security manager provisions enterprise users using Oracle Authorization Policy Manager, see the "Managing Security Artifacts" chapter in the *Oracle Fusion Middleware Oracle Authorization Policy Manager Administrator's Guide (Oracle Fusion Applications Edition)*.
- Before running the application in the staging environment, the IT security manager must reconcile the application roles GUIDs of any data security policies that were created based on new custom application roles.  
When the file-based policy store is merged, the GUIDs of application roles are not preserved. For information about how the IT security manager reconciles GUIDs using a WLST command, see the "Securing Oracle Fusion Applications" chapter in the *Oracle Fusion Applications Administrator's Guide*.
- Before running the application in the staging environment, the IT security manager must modify the application to use the LDAP-based policy store provided by the testing environment.  
For more information, see the "Implementing Function Security" chapter in the *Oracle Fusion Applications Developer's Guide*.

- After testing is completed in the staging environment, the IT security manager can deploy the application to the production environment and must again reconcile the application roles GUIDs of any data security policies that were created based on custom application roles, before merging the application policy store from the staging environment with the policy store in production.

Whenever the policy store merge is performed, the GUIDs of application roles are not preserved. For information about how the IT security manager reconciles GUIDs using a WLST command, see the "Securing Oracle Fusion Applications" chapter in the *Oracle Fusion Applications Administrator's Guide*.

For information about how the IT security manager merges the policies using Oracle Authorization Policy Manager, see the "Upgrading Oracle Fusion Applications Policies" chapter in the *Oracle Fusion Middleware Oracle Authorization Policy Manager Administrator's Guide (Oracle Fusion Applications Edition)*.

### 15.3.11 Before You Begin Customizing Security

Before you begin customizing security, you should be familiar with the Oracle Fusion application architecture that enables customization, as described in [Chapter 1, "Customizing and Extending Oracle Fusion Applications."](#) You should also understand the typical workflows for working with customizations, as described in [Chapter 2, "Understanding the Customization Development Lifecycle."](#)

You will need to do the following before you can begin customizing security:

1. Install JDeveloper and set up your development environment.

For more information, see the "Setting Up Your Development Environment" chapter in the *Oracle Fusion Applications Developer's Guide*.

2. Create an application workspace.

Before you can implement customizations using JDeveloper, you must create a workspace that imports the necessary parts of the application you want to customize. For more information, see [Section 10.2.1, "Creating the Customization Application Workspace."](#)

3. Launch JDeveloper in the appropriate role.

If you are implementing customizations on existing application artifacts, you must select the **Oracle Fusion Applications Administrator Customization** role when you launch JDeveloper.

If you are creating new custom application artifacts (such as, entity objects, view objects, and pages), you must select the **Oracle Fusion Applications Developer** role when you launch JDeveloper.

4. Create the database resources in the Oracle Fusion Applications database tables.

The database table exposes the data in your application. You are free to use any tool you wish to create database objects in the Oracle Fusion Applications schema. For example, you may choose to work with the Database Navigator in JDeveloper to model database objects. For information about creating database objects, see the Designing Databases topics in the JDeveloper online help.

5. When securing confidential personally identifiable information (PII) create a new table for the data records in the Oracle Fusion Applications schema, a view corresponding to the new table, and a VPD policy to associate a PL/SQL filter function with the view.

The VPD policy filters the view to expose the data for which data security policies may be created. For information about creating VPD policies, see the "Using Oracle Virtual Private Database to Control Data Access" chapter in the *Oracle Database Security Guide*.

**6.** In Oracle Authorization Policy Manager, create custom application roles.

Data security and function security permit granting access privileges to Oracle Fusion Applications duty roles (also called OPSS application roles). Although Oracle Fusion Applications ships with standard duty roles, as an Oracle Fusion security guidelines, you must create new duty roles rather than grant privileges to predefined duty roles.

For information about creating application roles, see the "Managing Security Artifacts" chapter in the *Oracle Fusion Middleware Oracle Authorization Policy Manager Administrator's Guide (Oracle Fusion Applications Edition)*.

**7.** In HCM core application, create job roles, as needed.

Job roles (also called OPSS enterprise roles) provide access to application resources through the Oracle Fusion Applications role inheritance hierarchy which specifies the inherited duty roles. Although Oracle Fusion Applications ships with standard job roles, the IT security manager can create a new job role when one does already exist that defines the new duties.

The IT security manager uses integrated Oracle Identity Management pages to create and manage job roles in Oracle Fusion Applications. For information about creating job roles, see the "Managing Roles" chapter in the *Oracle Fusion Middleware User's Guide for Oracle Identity Manager*.

**8.** Determine the business components in your application's data model project that you want to create or customize.

You can create or customize ADF entity objects and ADF view objects using JDeveloper to expose business objects in your application and opt into data security policies. For information about creating these business components, see [Chapter 11, "Customizing and Extending ADF Application Artifacts."](#)

**9.** Determine the application artifacts in your user interface project that you want to create or customize.

The following application artifacts that you create or customize using JDeveloper may be secured: ADF bounded task flows and ADF page definition files for top-level web pages. For information about creating these artifacts, in [Chapter 11, "Customizing and Extending ADF Application Artifacts."](#)

**10.** In JDeveloper, run the ADF Security wizard on your application.

When you run the ADF Security wizard it configures your application to enable authorization checking so that Oracle Platform Security Services (OPSS) running in Oracle WebLogic Server (and in JDeveloper's test environment, Integrated WebLogic Server) will utilize the security policies to authorize access to application resources by the end user. OPSS determines whether the end user (represented by the JAAS subject) has the privileges necessary to access the resources they intend.

For information about running the wizard, see the "Implementing Function Security" chapter in the *Oracle Fusion Applications Developer's Guide*.

## 15.4 Defining Data Security Policies on Custom Business Objects

In Oracle Authorization Policy Manager, the general process for defining a data security policy is as follows.

1. Register the custom business object as a database resource.
2. Define the instance set of data records that you want to associate with specific securable operations of the business component.

An instance set in Oracle Fusion Data Security is a security artifact called a *condition*. The policy identifies conditions from the security repository to determine the row instance set available to the end user provisioned to the role with the right to perform the intended business component operation.

In Oracle Authorization Policy Manager, a condition you create defines an instance set of multiple rows specified either by simple filters (XML defined) or complex SQL queries whose values can be parameterized. No condition definition is needed in the case of a single row instance or all the row instances of the database resource.

3. Define the list of actions that you want to be able to grant to the role.

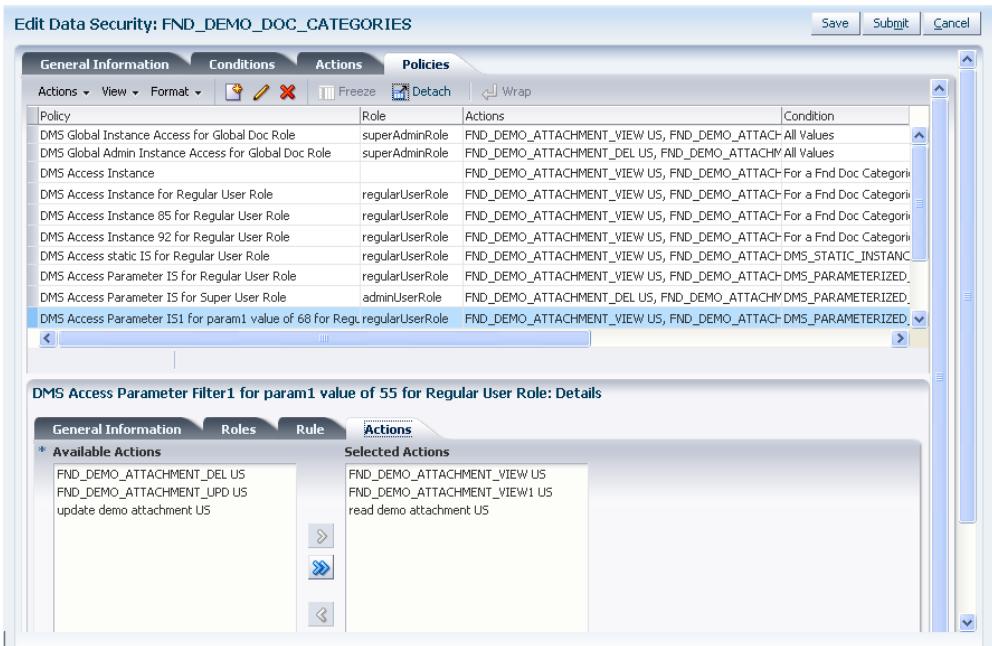
Action are database equivalent CRUD operations and correspond to the names of securable operations of the business object that the end user may invoke. The data security policy you define will associate one or more actions with an instance set.

4. If the custom business object is not supported by a data role template, define the data security policy:
  - a. Enter a name and start date for the data security policy.
  - b. Select one or more job roles or duty roles to which the policy grants access. The roles you select entitle all end users assigned to those roles with access to the data.

In Oracle Authorization Policy Manager, duty role names that you enter are identified as OPSS internal roles called *application roles*. Similarly, job role names are identified as OPSS external roles called *enterprise roles*.

- c. Specify an instance set on the database resource for which the policy will control access. This may be a single row, all rows, or multiple rows (specified by a previously defined named condition).
- d. Specify one or more actions to secure on the database resource for the currently specified instance set.
- e. Repeat the steps to grant actions access to additional instance sets for the current data security policy and roles.

[Figure 15–1](#) illustrates the **Actions** tab in the Edit Data Security page after several actions have been selected. Available actions will be limited to the actions that had been defined for the database resource.

**Figure 15–1 Creating a Data Security Policy - Selecting Actions**

5. If the custom business object is supported by a data role template, then update the data role template with the following information:
  - a. When the job role grantee of the data security policies generated by the template are not already defined by the existing data role template, add a new external role.  
The data role template specifies which base roles to combine with which dimension values for a set of data security policies.
  - b. When the custom business object expresses a new stripe of data to apply to the generated data security policies, modify the SQL code that identifies the dimension of the template.  
Note that the SQL code cannot be modified after running the template.
  - c. When the data role grantee of the data security policies generated by the template are not already defined by the existing data role template, configure a new data role name.  
The data role template constrains the data roles with access privileges for specific data records with particular actions. The data role provides provisioned end users with access to a dimensional subset of the data granted by a data security policy.
  - d. Select the database resource that you registered for the custom business object.
  - e. Optionally, select one or more data sets that you specified as named conditions when you created the database resource.  
Alternatively, the template can generate policies based on the primary key of the database resource.
  - f. Specify one or more actions to secure on the database resource for the currently specified instance set.

**Before you begin:**

If you will be creating or editing Oracle Fusion Data Security security policies in Oracle Fusion Applications, you will need the correct privileges. When you have the correct privileges, Oracle Authorization Policy Manager allows you to access the security data security customization user interface.

The Oracle Fusion security reference implementation defines the job role **IT Security Manager** with a duty role hierarchy that includes the **Application Data Security Administration Duty** duty role. This duty role is entitled to manage data security policies (the entitlement is **Manage Data Security Policy**) and provides the access necessary to perform the **Manage Data Security Policies** task in Oracle Authorization Policy Manager. Please contact your security administrator for details.

Additionally, collect the following information that you will use to define the data security policy in Oracle Authorization Policy Manager:

- The primary key of the database table or view that the custom business object represents.

You specified the primary key of the database table or view when you registered the database resource.
- The names of the conditions for which you want the policy to control access.

When you registered the database resource, you may have created named conditions to control access to instance sets comprised of multiple rows (Oracle Fusion Data Security does not require that you create a named condition when you want to grant access to instance sets comprised either of a single row or of all rows of the database resource).
- The names of the actions for which you want to associate with a particular named condition (or instance set) to control access.

When you registered the database resource, you named actions to identify the securable operations of the custom business object. Action names must be identical to the names of the operations the business object supports. For example, the names of actions corresponding to the supported standard operations are **view**, **edit**, and **delete**. However, if your data model project defines custom operations, actions may have names corresponding to operations named, for example, as **view\_US\_ONLY**, **edit\_US\_ONLY**, or **delete\_US\_ONLY**.
- The names of the custom duty roles for which you want to grant access to the conditions and actions of the database resource associated with the custom business object.

As an Oracle Fusion security guideline, predefined duty roles defined by the reference implementation should not be modified. You must use Oracle Authorization Policy Manager to create a new duty role rather than grant data security privileges to predefined duty roles. For information about creating roles, see the "Managing Security Artifacts" chapter in the *Oracle Fusion Middleware Oracle Authorization Policy Manager Administrator's Guide (Oracle Fusion Applications Edition)*.

**Task: Creating Conditions on a Business Object**

A business object can define securable instance sets of data records called *conditions*. The data security policy you create may identify a specific data record, all data records of the object, or multiple data records. When you want to secure specific sets of records, then conditions must be created on the business object. From any Oracle Fusion Setup application, you select **Setup and Maintenance** in the **Administration**

menu, you then select **Manage Data Security Policies**. After you register the business object as a database resource in the **General Information** tab, click the **Conditions** tab and click **New**. In the Create Database Resource Condition dialog, enter the SQL predicate consisting of a query on the table named by the database resource. For more information, see the "Managing Oracle Fusion Applications Data Security Policies" chapter in the *Oracle Fusion Middleware Oracle Authorization Policy Manager Administrator's Guide (Oracle Fusion Applications Edition)*.

#### **Task: Granting Access for a Privilege to a Specific Role and Object Condition**

A business object can define conditions that query only the set of data records that are relevant to the members of a particular enterprise role or application role (also called job roles or duty roles, respectively). You can secure these sets of data records by making grants on conditions of the business object for a particular application role and privilege that you define. Condition-level security lets you secure any number of subsets of the business instances defined by the business object. As an alternative to standard privileges, you can define a custom privilege to create a security policy for operations that may be specific to a particular group of end users. Custom privileges also let you enforce security in the data model project at the level of the ADF view object and perform authorization checking to secure individual business object attributes. From any Oracle Fusion Setup application, you select **Setup and Maintenance** in the **Administration** menu, you then select **Manage Data Security Policies**. After you register the business object as a database resource (using the **General Information**, **Conditions**, and **Actions** tabs), click the **Policies** tab and click **New**. You then use the policy workflow at the bottom of the Edit Data Security page (**Roles**, **Rule**, and **Action** tabs) to create the data security policy. For more information, see the "Managing Oracle Fusion Applications Data Security Policies" chapter in the *Oracle Fusion Middleware Oracle Authorization Policy Manager Administrator's Guide (Oracle Fusion Applications Edition)*.

#### **Task: Granting Access to a Specific Data Role and Dimension Values**

A business object can be mapped to a set of dimension values and data role naming rules defined by data role templates. A data role for a defined set of data describes the job an end user does within that defined set of data. A data role inherits job or abstract roles and grants entitlement to access data within a specific dimension of data based on data security policies. The dimension expresses stripes of data, such as territorial or geographic information you use to partition enterprise data. You use data role templates to generate data roles and the template applies the values of the dimension and participant data security policies to the group of base roles. From any Oracle Fusion Setup application, you select **Setup and Maintenance** in the **Administration** menu, you then select **Manage Data Role Templates**. In the data role template workflow, you use the tabbed pages (**External Role**, **Dimension**, **Naming**, and **Policies** tabs) to create a data role template or revise an existing one. For more information, see the "Oracle Fusion Applications Data Role Templates" chapter in the *Oracle Fusion Middleware Oracle Authorization Policy Manager Administrator's Guide (Oracle Fusion Applications Edition)*.

## **15.5 Enforcing Data Security in the Data Model Project**

Data security policies secure data from business objects based on the grants made to roles. The business object participating in data security defines a database resource (a database table or view) that has been registered in the Oracle Fusion Applications FND\_OBJECTS table. When you need to expose data records in the extended application you can use JDeveloper and Oracle ADF to create a data model project with ADF entity objects based on secured database resources. However, it is not

sufficient to register the business object in FND\_OBJECTS and define data security policies, additionally, you must opt into those data security policies by enabling row-level OPSS authorization checking for specific operations on ADF entity objects in the data model project.

By default, once the database table or view backing the ADF entity object has been registered as a database resource in the FND\_OBJECTS table, Oracle Fusion Data Security denies end users access to the business object data. Enabling OPSS authorization checking for the operations (such as view, edit, delete) by setting metadata on the ADF entity object of the data model project, ensures that only end users with sufficient privileges are authorized to perform the actions on the database resources corresponding to the ADF entity object.

JDeveloper saves the security metadata that you define on the data model project into the MDS repository.

#### **Before you begin:**

If the ADF entity object does not appear in the data model project, then you cannot opt into data security policies that may exist for the business object. You must use JDeveloper to create the ADF entity object based on a database table or database view that you intend to register in the Oracle Fusion Data Security schema. For more information, see [Chapter 11, "Customizing and Extending ADF Application Artifacts."](#)

In order for OPSS to enforce security, the database table or view backing the ADF entity object must be registered as a business object with the FND\_OBJECTS table provisioned by Oracle Fusion Data Security (the registered business object is also called a *database resource* of the Oracle Fusion Data Security schema). You will need to use Oracle Authorization Policy Manager to register the custom business object corresponding to the ADF entity object data source. For more information, see the "Managing Oracle Fusion Applications Data Security Policies" chapter in the *Oracle Fusion Middleware Oracle Authorization Policy Manager Administrator's Guide (Oracle Fusion Applications Edition)*.

Enabling security for custom operations in the data model project requires a custom privilege in the data security policy defined on the business object. You will need to create the custom privilege in the data security repository. For more information, see [Section 15.4, "Defining Data Security Policies on Custom Business Objects."](#)

#### **Task: Enforcing Row Security for the Standard Operations of a Business Object**

The ADF entity object in a data model project defines metadata that enables OPSS authorization checking against data security policies for view, update, or delete operations (also called standard operations) of the registered business object. You enable row-level security for standard operations by selecting the operation on the ADF entity object that maps to the business object upon which data security policies exist. Although the ADF entity object maps to all instances of the business object, the data security policy defines business object conditions to filter the records available to the end user. Filtering of the business object for standard operations supports only row-level security. In JDeveloper, you display the ADF entity object in the overview editor and, in the editor, click the **General** navigation tab and expand the Security section, and then you select the list of standard operations for which you want to enforce authorization checking against data security policies. For more information, see the "Implementing Oracle Fusion Data Security" chapter in the *Oracle Fusion Applications Developer's Guide*.

**Task: Enforcing Row Security for a Custom Operation of a Business Object**

The ADF entity object in a data model project does not support OPSS authorization checking against data security policies for custom operations of the registered business object. You enable row-level security for custom operations by mapping a view criteria you create in the data model project to a custom privilege in the data security policy defined on the business object. The view criteria creates a row set filter by naming the custom privilege and business object. Filtering of the business object by view criteria works only with custom operations. In JDeveloper, you display the ADF view object in the overview editor and, in the editor, click the **Query** navigation tab and expand the View Criteria section, and then you click the **Add** button to create a view criteria to enforce authorization checking for a custom operation. For more information, see the "Implementing Oracle Fusion Data Security" chapter in the *Oracle Fusion Applications Developer's Guide*.

**Task: Enforcing Security for Attributes of a Business Object**

The ADF entity object in a data model project does not support authorization checks against data security policies for columns of the registered business object. You enable security for attributes by creating a custom OPSS permission to control access to the column read or update operation, and then, in the Oracle Fusion Data Security repository, you map the operation to a custom privilege and grant the privilege to specify the roles that are authorized to view or update the data records. Last, in the user interface, you enter an ADF Security Expression Language (EL) utility method to test that custom privilege using an EL expression on the user interface component displaying the attribute. For more information, see the "Implementing Oracle Fusion Data Security" chapter in the *Oracle Fusion Applications Developer's Guide*.

## 15.6 Defining Function Security Policies for the User Interface Project

You can use JDeveloper to define function security policies directly in an exported version of the Oracle Fusion application security repository. The IT security manager exports the policies that exist in the LDAP-based application security policy store (residing in a test environment) into an XML file that can be loaded in JDeveloper and edited using the provided security policy editor.

After editing the XML file, you must consult the IT security manager to merge the security policies into the test environment.

In JDeveloper, the general process for defining function security policies is as follows:

1. Consult an IT security manager to export all predefined function security policies of the application that you are customizing into a `jazn-data.xml` file.

For details about how the security manager exports the application policy store, see the "Securing Oracle Fusion Applications" chapter in the *Oracle Fusion Applications Administrator's Guide*.

2. Copy the exported `jazn-data.xml` file into your application workspace.

This is the file that JDeveloper will update when you create function security policies. In order for JDeveloper to use the file, copy the file to your application workspace in the `<JDevAppHome>/src/META-INF` folder.

3. Create an entitlement to group one or more custom resources and their corresponding actions that together entitle end users to access the resource when needed to complete a specific duty.

In the Oracle Fusion Applications environment, the basic security artifact for entitlement-based security policies is the entitlement (an entitlement is defined by an *OPSS permission set*).

4. Grant the entitlement to a custom duty role that was added to the Oracle Fusion application policy store.

The entitlement grant to the role specifies that the end user must be a member of the role to access the resources specified by the entitlement. You should use custom duty roles and you should not grant entitlements to predefined duty roles.

In JDeveloper, duty role names that you select are identified as OPSS internal roles called *application roles*.

5. Enable ADF Security for the application by running the Configure ADF Security wizard.

The wizard configures files that integrate ADF Security with OPSS on Integrated WebLogic Server.

After you run the ADF Security wizard, any web page associated with a bounded ADF task flow will be protected. Therefore *before* you can run the application and test security, you must define the security policies that grant end users access.

#### **Before you begin:**

Consult the IT security manager to obtain the file-based application policy store in the form of a `jazn-data.xml` file. The IT security manager can run an Oracle WebLogic Script Language (WLSL) script to export the LDAP-based application policy store to the XML file. For more information about how the security manager exports the application policy store, see the "Securing Oracle Fusion Applications" chapter in the *Oracle Fusion Applications Administrator's Guide*.

If the custom bounded task flows or top-level web pages do not appear in the user interface project of the extended application, then you cannot define application security policies. You must use JDeveloper to create the securable Oracle ADF application artifacts. For more information, see [Chapter 11, "Customizing and Extending ADF Application Artifacts."](#)

As an Oracle Fusion security guideline, predefined duty roles defined by the reference implementation should not be modified. You must use Oracle Authorization Policy Manager to create a new duty role rather than grant function security privileges to predefined duty roles. For information about creating duty roles, see the "Managing Security Artifacts" chapter in the *Oracle Fusion Middleware Oracle Authorization Policy Manager Administrator's Guide (Oracle Fusion Applications Edition)*.

#### **Task: Defining Entitlement Grants for a Specific Application Role**

An entitlement grant is a set of resource grants (set of OPSS permissions) that will be required by the end user to complete a task. Each permission in the entitlement grant names an OPSS permission class, a resource, and an action. Entitlements must be granted to custom application roles. In JDeveloper, when you want to define the privileges needed to perform a task, you choose **Application > Security > Entitlement Grants**, and then you name the entitlement, add member resources and the actions that you want to secure. Then you grant the entitlement to a custom application role. For more information, see the "Implementing Function Security" chapter in the *Oracle Fusion Applications Developer's Guide*.

**Task: Defining Resource Grants for the Authenticated User Role**

A resource grant sets an OPSS permission on a single application resource and grants that permission to an application role. In JDeveloper, when you want to make the resource publicly accessible, you choose **Application > Security > Resource Grants**, and then you select the Oracle ADF artifact, the built-in OPSS role **authenticated-role** (or **anonymous-role**) as the grantee, and the action that you want to make public. For more information, see the "Implementing Function Security" chapter in the *Oracle Fusion Applications Developer's Guide*.



# 16

---

## Translating Custom Text

This chapter describes how to localize the changes that you make using Oracle Composer and CRM Composer. It also describes how to localize your navigator menu customizations and your flexfield and value set configurations.

This chapter includes the following sections:

- [Section 16.1, "About Translating Custom Text"](#)
- [Section 16.2, "Translating Resource Bundles from Metadata Services Metadata Repository"](#)
- [Section 16.3, "Translating Oracle Composer and CRM Application Composer Customizations"](#)
- [Section 16.4, "Translating Navigator Menu Customizations"](#)
- [Section 16.5, "Translating Flexfield and Value Set Configurations"](#)

### 16.1 About Translating Custom Text

If your Oracle Fusion Applications are running in different locales, you can localize your customizations such that end users see the custom text in the language of their locale. End users set their locale when they log in. Users can also set their locale through the **Personalization > Set Preferences** menu item in the Oracle Fusion Applications global area.

You use XML Localization Interchange File Format (XLIFF) documents stored in the Metadata Services (MDS) metadata repository to provide locale translations for your Oracle Composer, CRM Composer, and navigator menu changes. For flexfield and value set configurations, you provide locale translations using the appropriate maintenance tasks.

For information about XLIFF documents, see the "Manually Defining Resource Bundles and Locales" section in the *Oracle Fusion Middleware Web User Interface Developer's Guide for Oracle Application Development Framework*.

### 16.2 Translating Resource Bundles from Metadata Services Metadata Repository

You can use the WebLogic Server Tool (WLST) `exportMetadata` command to obtain XLIFF documents and you can use the WLST `importMetadata` command to import XLIFF documents into the metadata repository. For information about the metadata repository and the `exportMetadata` and `importMetadata` commands, see the Managing the Metadata Repository chapter in the *Oracle Fusion Middleware Administrator's Guide*.

**Tip:** You can also use Oracle Enterprise Manager Fusion Middleware Control to import and export the XLIFF documents from the metadata repository. For more information, see the "Transferring Metadata Using Fusion Middleware Control" section in the *Oracle Fusion Middleware Administrator's Guide*.

For specific information about localizing Oracle Composer and CRM Composer customizations, see [Section 16.3, "Translating Oracle Composer and CRM Application Composer Customizations."](#) For specific information about localizing navigator menu customizations, see [Section 16.4, "Translating Navigator Menu Customizations."](#)

### Task: Define Translations for MDS Metadata Repository

To localize the custom text, complete the following steps.

1. Use the WLST `exportMetadata` command shown in [Example 16–1](#) to export XLIFF documents from the metadata repository to a directory of your choice.

#### **Example 16–1 WLST `exportMetadata` Command**

```
exportMetadata(application='application', server='server',
toLocation='directory-path',
docs='xlf-classpath', applicationVersion='version')
```

Set the `docs` attribute to the class path for the XLIFF file. For example, use `/oracle/apps/resourcebundles/xliffBundle/FusionAppsOverrideBundle.xlf` for the base file for Oracle Composer and CRM composer custom text. Use `/oracle/apps/menu/CustResourceBundle.xlf` for the base file for navigator menu custom text. Use the following format for the names of locale documents:

`basename_language[_country].xlf`

Replace `language` with the ISO 639 lowercase language code, such as `fr` for France. When applicable, replace `country` with the ISO 3166 uppercase country code. Country codes are necessary when one language is used by more than one country. For example, use `CustResourceBundle_zh_CN.xlf` for custom translations for Chinese in the People's Republic of China.

Because all Oracle Fusion Applications use the same MDS partition, you can use any Oracle Fusion application as an argument for the `application` attribute when you export an XLIFF file for text customizations.

2. Synchronize the entries in the XLIFF documents and provide the translated text in the `<target>` tags, as shown in [Example 16–2](#).

#### **Example 16–2 Sample Translation**

```
<trans-unit id="ACCOUNTING_DISTRIBUTION">
  <source>Accounting Distribution</source>
  <target>Ventilation comptable</target>
  <note>Accounting Distribution</note>
</trans-unit>
```

3. Use the WLST `importMetadata` command shown in [Example 16–2](#) to import the modified documents into the metadata repository.

#### **Example 16–3 WLST `importMetadata` Command**

```
importMetadata(application='application', server='server',
fromLocation='directory-path',
```

```
docs='xlf-classpath', applicationVersion='version')
```

Because all Oracle Fusion Applications use the same MDS partition, you can use any Oracle Fusion application as an argument for the application attribute when you import an XLIFF file for text customizations.

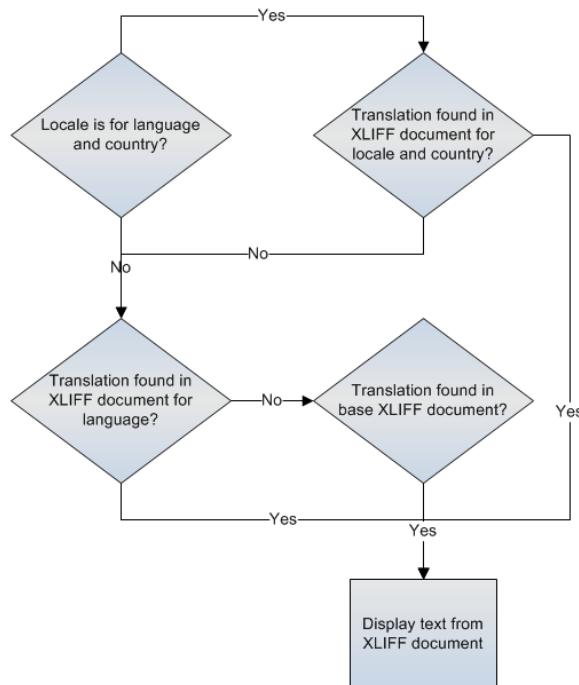
For more information about naming and editing XLIFF files, see the "Manually Defining Resource Bundles and Locales" section in the *Oracle Fusion Middleware Web User Interface Developer's Guide for Oracle Application Development Framework*.

## 16.3 Translating Oracle Composer and CRM Application Composer Customizations

All Oracle Composer and CRM Application Composer customizations are stored in the customizations XLIFF document for the locale of the session in which you made the customizations. After you customize a page using Oracle Composer or CRM application composer, you might want to define translations for the custom text in the base customizations file as well as the customizations files for the other supported locales. For example, you might want to define French and Chinese translations of new prompts.

As shown in [Figure 16–1](#), when an end user accesses the customized objects, the application loads the translated custom text for the locale's language and, if applicable, country. If the user's locale is for a language in a specific country and customized text is not available for that locale, the application loads the text for the locale's language. If no translated text is found, the application loads the text from the base customizations document.

**Figure 16–1 Process for Retrieving Translated Text**



Note that if no entries exist in the locale and base documents, the text that is displayed varies. For example, for a field label, the application displays the attribute name. In other cases, no text is displayed.

To define translations for custom text, follow the steps in [Task: Define Translations for MDS Metadata Repository in Section 16.2, "Translating Resource Bundles from Metadata Services Metadata Repository."](#) Export the base document

/oracle/apps/resourcebundles/xliffBundle/FusionAppsOverrideBundle.xlf and the documents for all the locales for which you want to define translations. The locale XLIFF documents are named

/oracle/apps/resourcebundles/xliffBundle/FusionAppsOverrideBundle\_language[\_country].xlf. Replace *language* with the ISO 639 lowercase language code, such as fr for France. When applicable, replace *country* with the ISO 3166 uppercase country code. Country codes are necessary when one language is used by more than one country. For example, use

/oracle/apps/resourcebundles/xliffBundle/FusionAppsOverrideBundle\_zh\_CN.xlf for custom translations for Chinese in the People's Republic of China.

---

**Note:** The

/oracle/apps/resourcebundles/xliffBundle/FusionAppsOverrideBundle.xlf base document is automatically generated the first time that a string is inserted or customized using Oracle Composer or CRM Composer. Ensure that the bundle exists by inserting or customizing at least one string.

---

Copy the new and changed entries from the document for the locale with which you made the customizations into the base document and into the other locale documents. Provide the translations and import the modified documents into the metadata repository.

## 16.4 Translating Navigator Menu Customizations

All navigator menu customizations are stored in the /oracle/apps/menu/CustResourceBundle.xlf base XLIFF document regardless of your locale setting when you customized the menu. After you customize the navigator menu, you might want to define translations for your changes in the locales that you support, including the locale for the session in which you entered the custom text. For example, you might want to define French and Chinese translations of new menu items.

The process for retrieving translated text is the same as for Oracle Composer and CRM Application Composer, as shown in [Figure 16-1](#), with the exception that if no entries exist in the locale and base documents, no text is displayed.

To create locale translations for your navigator menu changes, follow the steps in [Task: Define Translations for MDS Metadata Repository in Section 16.2, "Translating Resource Bundles from Metadata Services Metadata Repository."](#) Export the base document /oracle/apps/menu/CustResourceBundle.xlf and export the documents for all the locales for which you want to define translations. The locale XLIFF documents are named /oracle/apps/menu/CustResourceBundle\_language[\_country].xlf. Replace *language* with the ISO 639 lowercase language code, such as fr for France. When applicable, replace *country* with the ISO 3166 uppercase country code. Country codes are necessary when one language is used by more than one country. For example, use /oracle/apps/menu/CustResourceBundle\_zh\_CN.xlf for custom translations for Chinese in the People's Republic of China.

Copy the new and changed entries from the base document into the locale documents and provide the translations. Then import the modified locale documents into the metadata repository.

## 16.5 Translating Flexfield and Value Set Configurations

When you first configure a flexfield or segment, the translatable text that you enter, such as prompts and descriptions, is stored as the text for all installed locales. To translate the text for a particular locale, log in with that locale or use the Personalization menu in the global area to set the locale. Then update the translatable text in the flexfield using the appropriate task, as described in [Section 5.4.1, "Configuring Descriptive Flexfields"](#) and [Section 5.4.2, "Configuring Extensible Flexfields."](#) Your modifications only change the translated values for the current session's locale.

After you complete the translations, deploy the flexfield as described in [Section 5.6, "Deploying Flexfield Configurations."](#)

You can define translations for Dependent and Independent value sets of type Character that have a subtype of Translated text. You define the translations by setting the current session to the locale for which you want to define the translation and using the Manage Value Sets task as described in [Section 5.3, "Creating Custom Value Sets"](#) to enter the translated values and descriptions for that locale.

For Table value sets for which the underlying table supports multiple languages and for which the value set's value column is based on a translated attribute of the underlying table, you can define translated values using the maintenance task for the underlying table. For more information about enabling localization for Table value sets, see [Section 5.3, "Creating Custom Value Sets."](#) For information about multi-language support for tables, see "Using Multi-Language Support Features" in the *Oracle Fusion Applications Developer's Guide*.



---

## Configuring End User Personalization

This chapter describes how you can make pages in your Oracle Fusion application personalizable by the end user. Note that mobile applications cannot be personalized by the end user.

This chapter contains the following sections:

- [Section 17.1, "About Configuring End User Personalization"](#)
- [Section 17.2, "Allowing Pages to be Personalized by End Users in Oracle Composer"](#)
- [Section 17.3, "Configuring End User Personalization for Components"](#)

### 17.1 About Configuring End User Personalization

Oracle Fusion applications allow end users to personalize certain pages using the Personalize menu. End users can set preferences, edit the current page, and reset the page to the default.

You can control what pages in an application can be personalized, including any new pages you may create.

**Tip:** If you created a page using CRM Composer, then that page is personalizable by default.

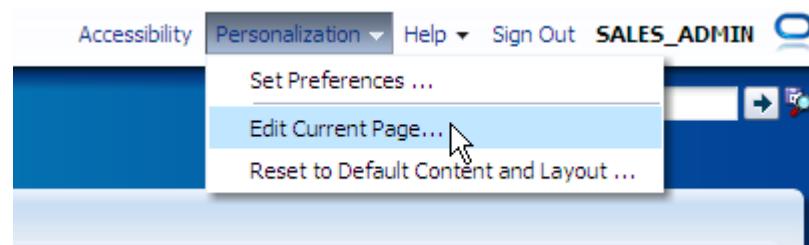
---

**Note:** For a list of pages that end users can personalize, refer to the product-specific documentation.

---

[Figure 17-1](#) shows the Personalize menu available in all Oracle Fusion Applications.

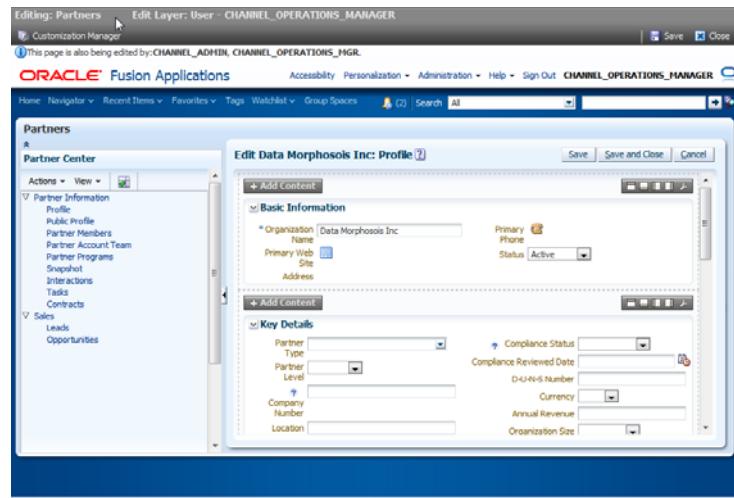
**Figure 17-1 Personalization Menu in Oracle Fusion Applications**



When end users choose the **Edit Current Page** menu item, Oracle Composer is launched. From here, they can change certain aspects of the page, such as moving or

deleting components. [Figure 17–2](#) shows the Partner Profile application home page in Oracle Composer, ready for the end user to personalize.

**Figure 17–2 Home Page Ready for Personalization**



Along with using Oracle Composer to personalize pages, end users can change certain aspects of components, and then have those changes saved so that they remain each time the user logs into the application. For example, end users can change the width of columns in many of the tables in Oracle Fusion applications. However, by default, when they change the width, that new width size is only saved for the current session. You can configure that column so that when the user changes the width size, it will remain at that size whenever the user logs back into the application. For more information about configuring persistence, see "Chapter 35 Allowing User Customizations at Runtime" of the *Oracle Fusion Middleware Fusion Developer's Guide for Oracle Application Development Framework*.

### 17.1.1 Before You Begin Allowing Pages or Components to be Personalized

Before you configure pages to be personalizable, you should be familiar with the Oracle Fusion application architecture that enables customization, as described in [Chapter 1, "Customizing and Extending Oracle Fusion Applications."](#) You should also understand the typical workflows for working with customizations, as described in [Chapter 2, "Understanding the Customization Development Lifecycle."](#)

You will also need to do the following:

- Install JDeveloper and set up your development environment. For more information, see "Chapter 2 Setting Up Your Development Environment" of the *Oracle Fusion Applications Developer's Guide*.
- Create a customization application workspace. For more information, see [Chapter 10, "Using JDeveloper for Customizations."](#)
- Launch JDeveloper in the Oracle Fusion Applications Administrator Customization role.
- Select a layer value. When customizing application artifacts in JDeveloper, you first need to select the layer and layer value to work in. You use the Customization Context window to make this selection. For more information about customization layers, see [Section 1.2, "Understanding Customization Layers."](#)

## 17.2 Allowing Pages to be Personalized by End Users in Oracle Composer

You use JDeveloper to set certain attributes that allow a page to be personalized.

### Task: Enable or Disable Personalization on Existing Standard Pages

Many pages in Oracle Fusion applications allow personalization by default. You can either disable it or enable it using the `isPersonalizableInComposer` property on a page. Set it to `true` to allow personalizations, set it to `false` to disallow personalizations. For instructions, see the "Preparing your Page for End-User Personalizations" section of the *Oracle Fusion Applications Developer's Guide*.

### Task: Enable Oracle Composer Personalization on Custom Pages

In order for end users to be able to use Oracle Composer to personalize custom pages, you'll need to enable your pages to work with Oracle Composer by doing the following:

- Set the `isPersonalizableInComposer` property to `true`.

For instructions, see the "Preparing your Page for End-User Personalizations" section of the *Oracle Fusion Applications Developer's Guide*.

---

**Note:** If a page is currently available for personalizations, and you don't want it to be, change the value to `false`.

---

- Create a corresponding page definition file, if one does not exist.

For instructions, see the "Ensuring Customizable Pages Have Page Definitions" section of the *Oracle Fusion Applications Developer's Guide*.

- Use Oracle WebCenter components that define areas that can be customizable.

For instructions, see the "Making a JSPX Document Editable at Runtime" section of the *Oracle Fusion Applications Developer's Guide*.

## 17.3 Configuring End User Personalization for Components

Certain attribute values that affect how an ADF Faces component displays can be persisted to the MDS repository. Application-wide component attribute persistence to the MDS repository is controlled by configuration in the `adf-config.xml` file. However, customizing this file is not allowed, as doing so is not upgrade-safe. Instead, you can override the application-wide persistence at the page level by setting the `persist` and `dontPersist` attributes for component instances.

For example, by default, table column attribute values are not persisted. But you can configure a column in a table so that when the user changes the width, reorders columns, or selects a column, those changes will still be in effect when the user logs back into the application, by adding those attributes to the value of the `persist` attribute on the column component. For more information about what attribute values can be persisted, see the "Introduction to Allowing User Customizations" section of the *Oracle Fusion Middleware Fusion Developer's Guide for Oracle Application Development Framework*.

---

**Note:** You cannot change the settings in the `adf-config.xml` file, as these changes will be overwritten anytime you apply a patch or an upgrade. Therefore, you must change the values on the individual components on a page.

---

#### **Task: Persist Attribute Values on JSPX Pages**

You need to add the attributes you want to persist to the `persist` attribute on the component. For more information, see the "Controlling User Customizations in Individual JSF Pages" section of the *Oracle Fusion Middleware Fusion Developer's Guide for Oracle Application Development Framework*. You can set this attribute using Oracle Composer. For more information about setting attributes on components, see [Section 3.3, "Editing Component Properties in Oracle Composer."](#)

# 18

---

## Customizing Help

This chapter describes how you can customize or extend user assistance help in your Oracle Fusion application to match any customizations.

This chapter contains the following sections:

- [Section 18.1, "About Customizing Help"](#)
- [Section 18.2, "Customizing or Extending Oracle Fusion Applications Help"](#)
- [Section 18.3, "Customizing or Adding Bubble Embedded Help"](#)
- [Section 18.4, "Customizing or Adding Static Instructions, In-field Notes, and Terminology Definitions"](#)

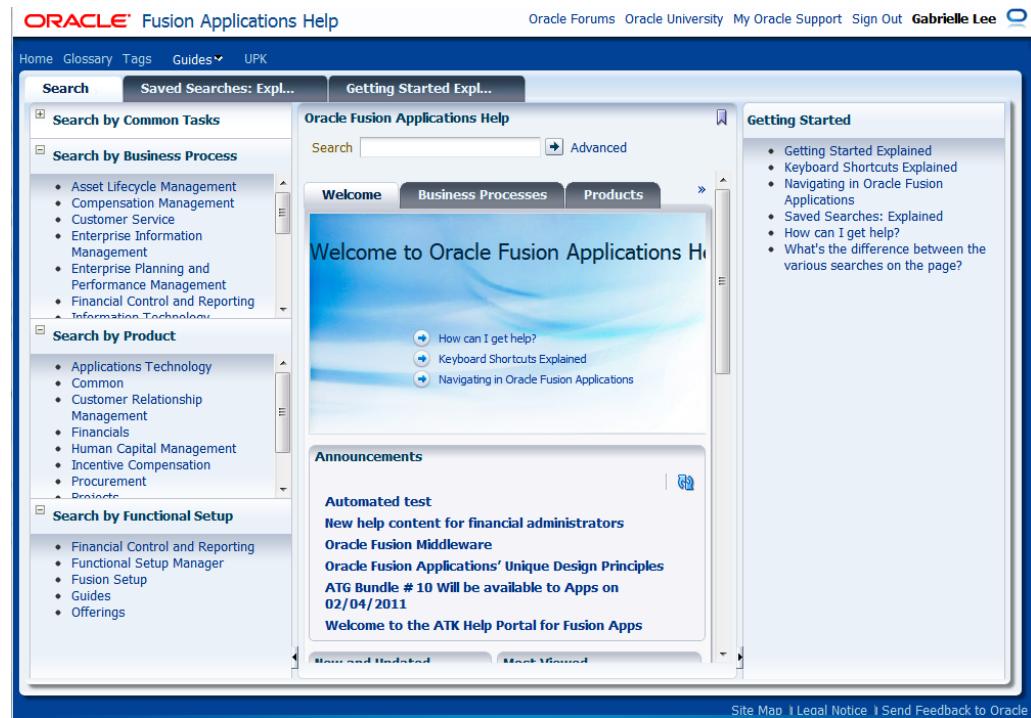
### 18.1 About Customizing Help

When you customize an Oracle Fusion application, you may find you also need to customize or extend the existing help to match your changes. Oracle Fusion applications provide two different types of help.

- Oracle Fusion Applications Help

This type of help includes help topics, FAQs, examples, demonstrations and PDF guides, and is delivered with the Oracle Fusion Applications Help, as shown in [Figure 18–1](#).

**Figure 18–1 Oracle Fusion Applications Help**



- Embedded static page-level help

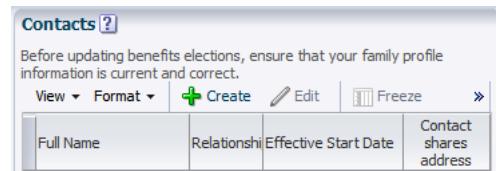
This type of help is displayed directly on a page, using attributes of a component. The help text is included in the application.

**Tip:** Help text is stored in resource bundles, and so can be translated. For more information, see [Chapter 16, "Translating Custom Text."](#)

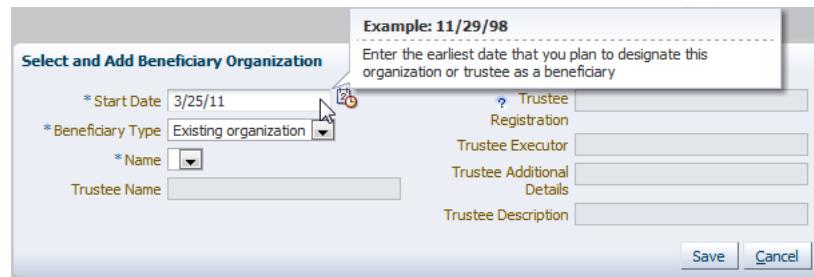
Embedded help includes the following:

- Static instruction text: displayed by panel components that normally contain forms or tables. This instruction guides the user in filling out the form or using the table, as shown in [Figure 18–2](#).

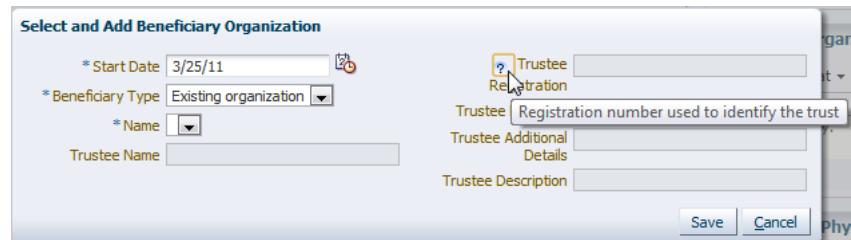
**Figure 18–2 Static Help Text in an Oracle Fusion application**



- In-field help note: displayed by input components and guides the user in entering data into the component. [Figure 18–3](#) shows an in-field note.

**Figure 18–3 In-field Note in an Oracle Fusion Application**

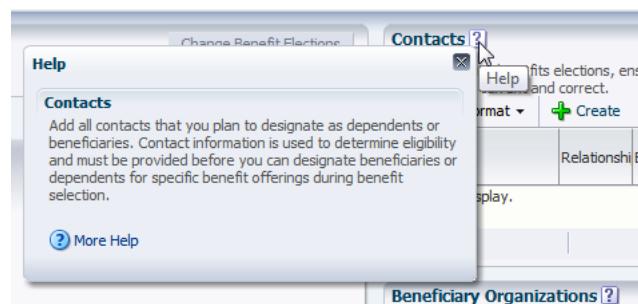
- Terminology definition: displayed by input components and defines terms used on the page, as shown in [Figure 18–4](#).

**Figure 18–4 Terminology Definition in an Oracle Fusion Application**

- Bubble help: displayed when the end user mouses over a button or link component, as shown in [Figure 18–5](#).

**Figure 18–5 Bubble Help in an Oracle Fusion Application**

- Help window: displayed when a user clicks the help icon, as shown in [Figure 18–6](#). This type of help is generally brief context-sensitive help, and can also provide links to help files in Oracle Fusion Applications Help.

**Figure 18–6 Help Window in an Oracle Fusion Application**

### 18.1.1 What You Can Do with Help

In Oracle Fusion Applications Help, you can change the content in existing help windows or you can create new help windows. Within a page of an application, you

can customize or create bubble help, static instructions, in-field notes, terminology definitions, and help windows. This help text is stored either as a value for an attribute, or in translatable resource bundles.

### 18.1.2 Before You Begin Customizing Help

Before you customize help, you should be familiar with the Oracle Fusion application architecture that enables customization, as described in [Chapter 1, "Customizing and Extending Oracle Fusion Applications."](#) You should also understand the typical workflows for working with customizations, as described in [Chapter 2, "Understanding the Customization Development Lifecycle."](#)

You will also need to do the following before you can begin customizing help:

- If you will be adding or customizing Oracle Fusion Applications Help, you will need the correct privileges. Please contact your security administrator for details.
- Install JDeveloper and set up your development environment. For more information, see "Chapter 2 Setting Up Your Development Environment" of the *Oracle Fusion Applications Developer's Guide*.
- Create a customization application workspace. For more information, see [Chapter 10, "Using JDeveloper for Customizations."](#)
- Launch JDeveloper in the Oracle Fusion Applications Administrator Customization role.
- Select a layer value. When customizing application artifacts in JDeveloper, you first need to select the layer and layer value to work in. You use the Customization Context window to make this selection. For more information about customization layers, see [Section 1.2, "Understanding Customization Layers."](#)

## 18.2 Customizing or Extending Oracle Fusion Applications Help

You can customize existing help files in Oracle Fusion Applications Help, or you can extend Oracle Fusion Applications Help by adding custom topics.

Once created, custom help files are distinguished by an icon in search results, and they are displayed at the top of help listings when you navigate.

### Task: Customize Oracle Fusion Applications Help Windows

When you have the correct privileges, help windows in Oracle Fusion Applications Help display a **Manage Custom Help** link, which allows you to change the content and specify in which help windows in the application your custom help will appear, and where it will appear in the help site navigators. For more information, see the "Define Help Configuration" section in the *Oracle Fusion Applications Common Implementation Guide*.

### Task: Add Custom Help Files to Oracle Fusion Applications Help

You can add new custom help files to Oracle Fusion Applications Help. Custom help files will appear like standard help files and can be searched and included in help windows and navigators. For more information, see the "Define Help Configuration" section in the *Oracle Fusion Applications Common Implementation Guide*.

## 18.3 Customizing or Adding Bubble Embedded Help

For bubble help, you can use CRM Application Composer or Oracle Composer to customize or create the help text.

The following components use bubble help.

- Butcon
- Button
- Link
- Tab

### Task: Customize or Add Bubble Help

The text displayed in bubble help is the value of the component's `shortDesc` attribute. Normally, the value resolves to a key in a resource bundle. If you are customizing a CRM application, you can use CRM Application Composer to customize the value of the attribute. For more information, see [Section 4.2, "Editing Objects."](#) For other applications, you use Oracle Composer to customize the attribute. For more information, see [Section 3.3, "Editing Component Properties in Oracle Composer."](#)

## 18.4 Customizing or Adding Static Instructions, In-field Notes, and Terminology Definitions

Oracle Fusion Applications embedded help (aside from bubble help) uses two types of ADF Faces help: *instruction* and *definition*. Instruction-type help displays static text, either in a specified area on a component (like static instruction help, shown in [Figure 18–2](#)), or in a note window, as in-field notes do, shown in [Figure 18–3](#). Definition-type help displays a help icon, and is what terminology definition embedded help uses, as shown in [Figure 18–4](#). When the user mouses over the help icon, the help text displays in a message box. UI components display the instruction and definition help text using the `helpTopicId` attribute. For more information about the ADF Faces help framework, see the "Displaying Help for Components" section of the *Oracle Fusion Middleware Web User Interface Developer's Guide for Oracle Application Development Framework*.

It is important that for the type of help you want to add or customize, you understand which component actually displays the help, and which type of ADF Faces help is being used. [Table 18–1](#) shows the different types of Oracle Fusion Applications embedded help, the corresponding ADF Faces help, and the components that display that type of help.

**Table 18–1 Oracle Fusion Applications Help and Corresponding ADF Faces Help and UI Components**

Oracle Fusion Application Help Type	ADF Faces Help Type	Component
Static instruction	instruction	Page header
		Subheader
		Sub-subheader

**Table 18–1 (Cont.) Oracle Fusion Applications Help and Corresponding ADF Faces Help and UI Components**

<b>Oracle Fusion Application Help Type</b>	<b>ADF Faces Help Type</b>	<b>Component</b>
In-field note	instruction	Multiselect check box group Single-select choice list Multiselect choice list Single-select list box Multiselect list box Text box Single-select radio groups Items in true/false radio groups Items in true/false check box groups Color picker Date/time picker Flexfield LOV Spin box Slider File upload Shuttle Rich Text Editor
Terminology definition	definition	Check box prompt Check box group prompt Single-select choice list Multiselect choice list Single-select list box Multiselect list box Text box Radio group prompt Color picker Date/time Picker Flexfield LOV Column headers Spin box Slider File upload Shuttle Rich Text Editor

You perform the following tasks in JDeveloper in the Oracle Fusion Applications Administrator Customization role.

---

**Note:** You cannot directly customize the existing help text strings. If you want to change text that currently appears, you need to create a new text string and associate the component with that new text.

---

### Task: Add Help Strings to Resource Bundle

Add custom help text strings to an existing custom resource bundle or create a new resource bundle to hold your customized help text (Oracle Fusion applications use XLIFF files for resource bundles). If you create a new resource file, you must register that file with the project. For information about creating and using resource bundles for an Oracle Fusion application, see [Section 11.10, "Customizing or Adding Resource Bundles."](#)

The help text must use the following syntax:

- <trans-unit>: Enter the topic ID. This must contain a unique prefix, the topic name, and the help type, either INSTRUCTION or DEFINITION.

---

**Note:** Your prefix must be unique. You must use this prefix for all your custom help strings.

---

For example:

MYCUSTHELP\_NEWHELPTOPIC\_DEFINITION

In this example, MYCUSTHELP is the prefix used to access the XLIFF file. NEWHELPTOPIC is the topic name, and DEFINITION is the type of ADF Faces help.

UI components access the help content based on the topic name. Therefore, if you use the same topic name for two different types of help (instruction and definition), then both types of help will be displayed by the UI component.

- <source>: Create as a direct child of the <trans-unit> element and enter the help text.
- <target>: Create as a direct child of the <trans-unit> element and leave it blank. This will hold translated text populated by translation tools.
- <note>: Create as a direct child of the <trans-unit> element and enter a description for the help text.

[Example 18–1](#) shows an example of a resource file that contains two topics.

#### Example 18–1 XLIFF Resource Bundle

```
<?xml version="1.0" encoding="UTF-8" ?>
<xliff version="1.1" xmlns="urn:oasis:names:tc:xliff:document:1.1">
  <file source-language="en" original="this" datatype="xml">
    <body>
      <trans-unit id="MYCUSTHELP_NEWHELPTOPIC_DEFINITION">
        <source>Credit Card Definition</source>
        <target/>
        <note>This is the credit card definition text.</note>
      </trans-unit>
      <trans-unit id="MYCUSTHELP_NEWTOPIC2_INSTRUCTIONS">
        <source>Credit Card Instructions</source>
        <target/>
        <note>This is the credit card instruction text.</note>
      </trans-unit>
    </body>
  </file>
</xliff>
```

```
</trans-unit>
</body>
</file>
</xliff>
```

### **Task: Associate the Component with the Help Strings**

In JDeveloper, select the component to display the help. Associate that component with the `<trans-unit>` element in the resource bundle, using the component's `helpTopicID` attribute. Ensure that the component supports the type of help (that is, definition or instruction) defined in the trans-unit id. For instructions, see the "How to Access Help Content from a UI Component" section of the *Oracle Fusion Middleware Web User Interface Developer's Guide for Oracle Application Development Framework*.