



ILP PROGRAM - ORACLE APPLICATIONS

Tata Consultancy Services

Forms Personalization Study Guide

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How to use this manual



Video1: Script: Vid1-Introduction to the chapter and its content – Face recording.

This video will introduce the material covered in this pdf, the goals,

1. How this document is organized
2. What is the purpose of this document
3. What will you achieve after going through the document and related videos
4. How to read this document
5. How does it relate to the work you will be doing on real project
6. Reference to other reading materials for further references

This manual has been organized as a step by step guide to teach how to create reports using Oracle Developer Suite 10G. The target audience is new comes to Oracle Developer suite. It assumes that the reader has basic knowledge of Oracle concepts and PL/SQL. After completing this course, you will be able to create variety of reports using Oracle Developer Suite 10G.

This manual is organized to be read in a serial fashion and follow the instructions given in the document as it is. Practical examples are given in each section to guide you through every step. The tables referred here are common (shared) tables used by different batches, so care should be taken not to delete or update the rows which does not belong to you, this may create problem for the other batches. At the end of the course, you should delete the data you have created.

There are several symbols used to designate particular sections, which are described below:



- Describes the purpose of the section.



- Notes relevant to the section above



- This denotes the task to be completed by the audience on his own PC. The layout of the output has to be followed as it is. For any confusion, the faculty should be contacted.

Forms Personalization

1. Introduction

Forms personalization is a powerful and easy to use tool, which comes with Oracle Applications. This tool is capable of changing the behavior of the forms supplied by Oracle Corporation at run time. The beauty of this tool is that you can make changes to the forms, without changing the real code behind it, and the change can be made effective for particular user, responsibility, site or Organization level. For example , in the Concurrent Program definition screen (which we have seen in the AOL course), the first Label can read as 'Program Name' for some user and read as 'Supply Program Name' for some other users, which for rest of the users , it will read the default 'Program'. This is the reason it is called 'Personalization'.

The screenshot shows the 'Concurrent Program' definition window. It contains several sections for configuring a concurrent program:

- Program Information:** Fields for Program, Short Name, Application, and Description. An 'Enabled' checkbox is present.
- Executable:** Fields for Name, Method, and Options.
- Request:** Fields for Type, Incrementer, and MLS Function.
- Output:** A 'Format' dropdown menu, checkboxes for 'Save (S)' and 'Print' (checked), and fields for 'Columns', 'Rows', 'Style', and 'Printer'. A 'Style Required' checkbox is also present.
- Business Events:** A grid of checkboxes for events like 'Request Submitted (Y)', 'Request Running', 'Post Processing Ended', 'Request On Hold', 'Program Completed', 'Request Completed (Z)', 'Request Resumed', and 'Post Processing Started'.
- Options:** Checkboxes for 'Use in SRS' (checked), 'Run Alone', 'Enable Trace', 'Allow Disabled Values', 'Restart on System Failure', and 'NLS Compliant' (checked).

At the bottom, there are buttons for 'Copy to...', 'Session Control', 'Incompatibilities', and 'Parameters'.

The beauty of this tool is:

1. Change does not require a code change
2. Change is effective immediately, does not need a form compilation
3. Changes can be reverted back by few mouse clicks
4. Change can be switched on and off by simple clicks
5. Changes can be made conditional



Note: Oracle never recommends changing the code of the forms (or any object) built inside Oracle Applications. The recommended ways to customize is to use custom.pll, Forms personalization, but if this does not suffice your need, you should make a copy of the original object (form, report etc.), and create a similar object in the custom application and make the changes. This way, you mitigate the risk of corrupting core functionality and risk of your changes getting wiped out by a patch or upgrade. Custom.pll can also perform almost all the jobs a forms personalization can do, but it requires a compilation, and may disturb other functionality, hence forms personalization should be the first choice.

2. Personalizing a Standard Oracle Forms

I. Set profile options:

Before we start creating a forms personalization, the following profile options needs to be set as shown in the diagram below:

Set 'Hide Diagnostics menu entry' to No (Yes will hide the diagnostics menu)

Set 'Profile Option Utilities: Diagnostics' to No (If set to No, apps password is required)

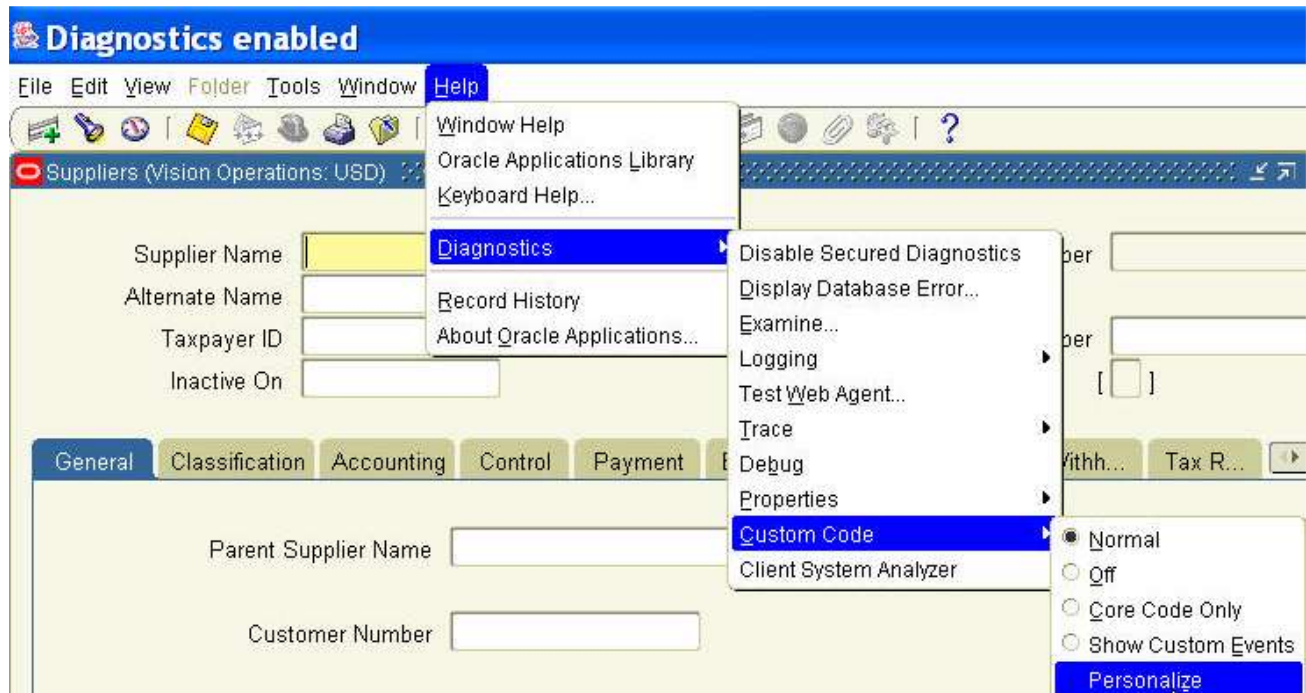
Profile	Site	Application	Responsibility	User
FND: Diagnostics	No			
Hide Diagnostics menu entry	No			
Utilities:Diagnostics	No			



Note: You may prefer to set it at the user level rather than site level

II. Invoke Forms Personalization:

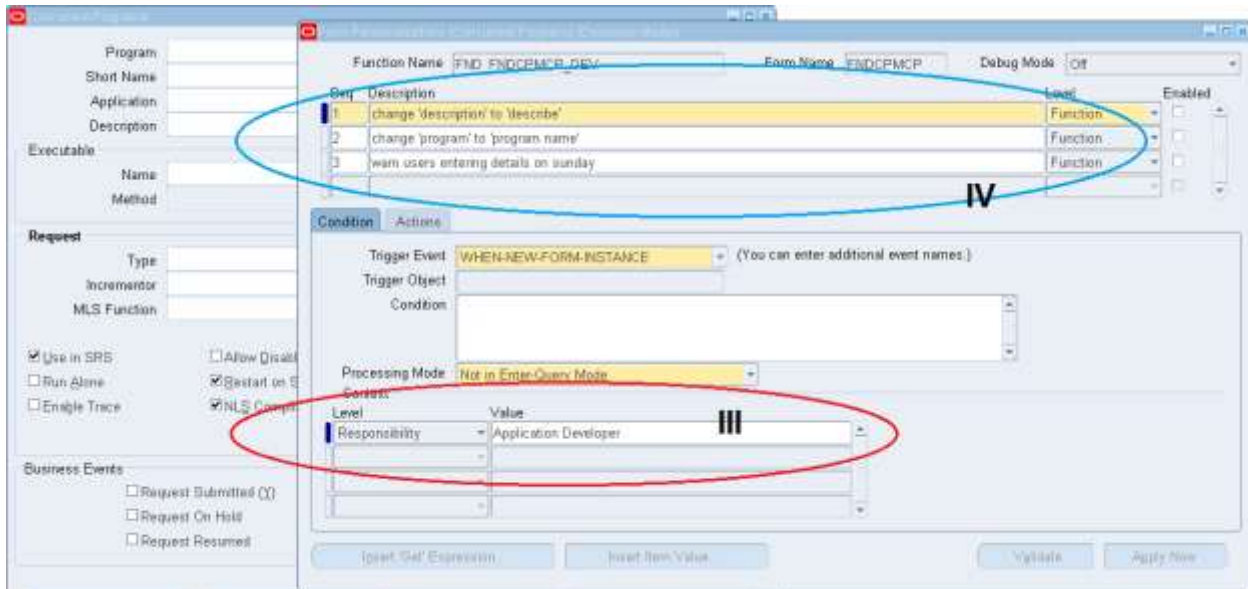
Open the form which you want to personalize within Oracle Applications, and Help > Diagnostics > Custom Code > Custom Code > Personalize



III. Select the condition of firing:

Select the condition when this personalization will fire, look at the Context section of the form (marked by red ellipse). In this case, it says that, when you log in with the responsibility – Application Developer, this personalization will be active.

Note that we are currently clicked at the 'Condition' button.



IV. Select the Personalization and their firing sequence

Now you need to select the personalization which you want to make in the top window, shown in blue eclipse.

Every personalization row will have a sequence number, and it will fire in the same sequence. Here you just enter the description, which is a text of your choice, Oracle will not bother what you have typed here. Select the Level as 'Function'

V. Select the action to be taken for each of the personalization rows

Hit the Actions tab, for every row in the top window, there is a set of actions in the 'Actions' window.

The screenshot shows the 'Form Personalizations (Concurrent Programs (Developer Mode))' window. At the top, 'Function Name' is 'FND_FNDCPMCP_DEV' and 'Form Name' is 'FNDCPMCP'. Below is a table of personalizations:

Seq	Description	Level	Enabled
1	change 'description' to 'describe'	Function	<input checked="" type="checkbox"/>
2	change 'program' to 'program name'	Function	<input type="checkbox"/>
3	warn users entering details on sunday	Function	<input type="checkbox"/>

A red line points to the first row (Seq 1). Below this table are tabs for 'Condition' and 'Actions'. The 'Actions' tab is active, showing a table of actions:

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

To the right of the actions table is a red-bordered box containing the details for the selected action (Seq 1):

- Object Type: Item
- Target Object: CONC_PROG_DESCRIPTION
- Property Name: PROMPT_TEXT
- Value: Describe

Buttons at the bottom include 'Insert Get Expression...', 'Insert Item Value...', 'Validate', and 'Apply Now'.



Note: Notice the small black marker pointed by the red line. Though there are many record displayed in the top windows, the row pointed by the blue marker is the current row, and the Actions displayed in the bottom window is the Actions for Personalization no1. If you click on second row in the top window, the blue marker will shift there and the Action details for this rows will be refreshed in the bottom window. The same is true for the section circled in blue in the above diagram.

Note that this is that standard way of sowing master detail data in all the forms inside Oracle Applications.

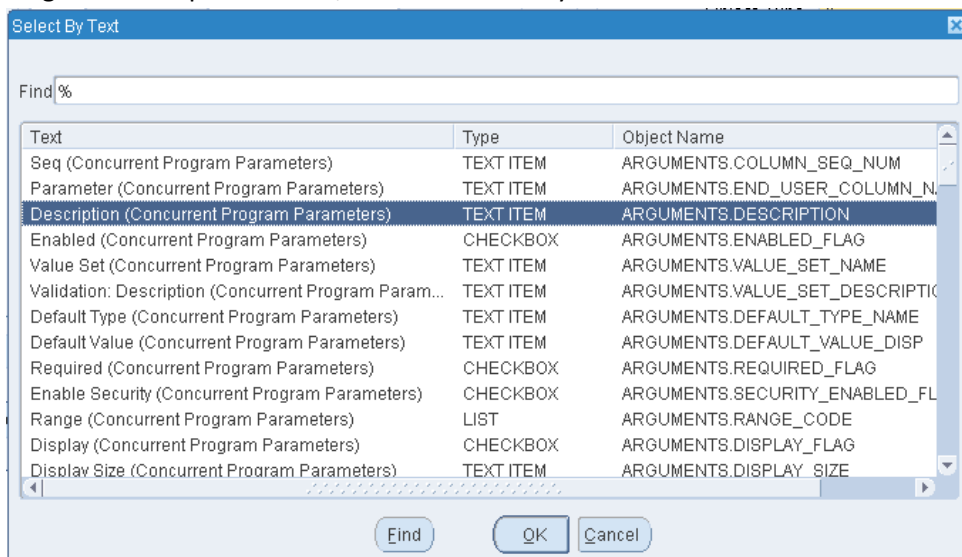
In the above diagram, note the following:

1. In the first personalization, we are trying to change the prompt of the field 'description' to 'describe'.
2. We have to now select the field which is linked to this text in the form, but we do not know the name of the field. Let us try to find this, click the 'Target Object' , you will see the list of fields to select from :



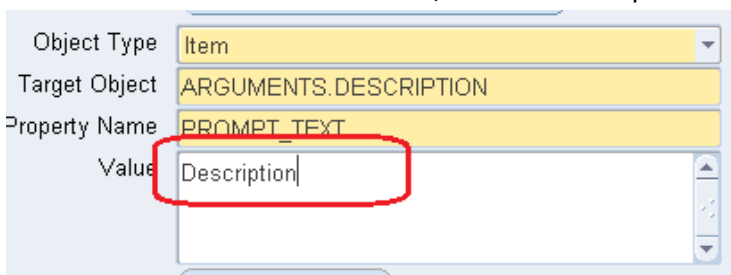
You will realize that it is not a simple task to guess the field name.

3. To get a better place to find, click the 'Select by Text' button.

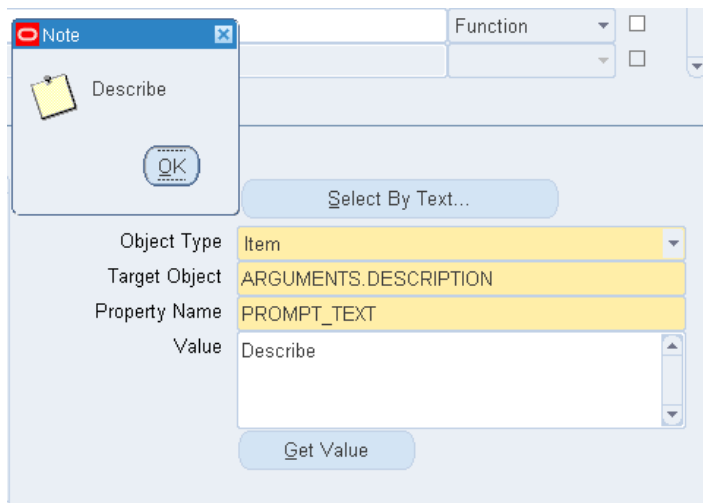


Now the fields will appear by the name they are displayed in the real form. In our case, the field is displayed as 'Description', so we will chose the one highlighted in the above diagram.

4. To double sure that you have selected the correct field, hit the 'Get Value' button. It will show you the value of this field in the 'Value' field, which is 'Description' here.

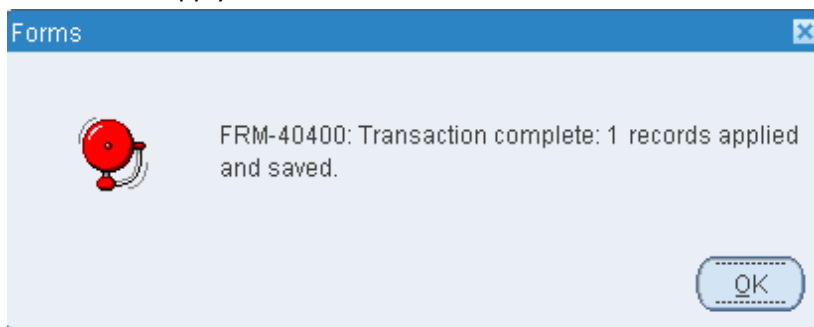


5. Now remove this with 'Describe' and hit validate button



A popup will appear confirming the same.

6. Now hit the 'Apply Now' button



7. Let us see, if it has worked – Change the responsibility to 'Application Developer' and open the same form – Concurrent > Program (or if you are already logged to the responsibility, you should see the effect right away, when you close the personalization window.

Oops! No effect! Let us investigate what has gone wrong!

Follow the same steps followed above to go to the personalization, and notice if you have checked the 'Enabled' button, if not enabled, do it.

Seq	Description	Level	Enabled
1	change 'description' to 'describe'	Function	<input checked="" type="checkbox"/>

Check again, if the effect is there: Yes it has worked. The personalization is working !

Concurrent Programs

Program ☒ Enabled

Short Name

Application

Describe

Executable

Name Options

Method

Request

Type

Incrementor

MLS Function

☒ Use in SRS ☐ Allow Disabled Values

☐ Run Alone ☒ Restart on System Failure

☐ Enable Trace ☒ NLS Compliant

Output

Format

☒ Save (C) ☒ Print

Columns

Rows

Style

☐ Style Required

Printer

Business Events

☐ Request Submitted (Y) ☐ Request Running ☐ Post Processing Ended

☐ Request On Hold ☐ Program Completed ☐ Request Completed (Z)

☐ Request Resumed ☐ Post Processing Started

Copy to... Session Control Incmpatibilities Parameters

Note that if the personalization is not enabled, it will not have the effect, this shows how easy it is to switch off the changes you have made.

There are many more features and many variations of the personalization. However this course is limited to basics only, now we will do an exercise.

The videos will show you some more examples and variations of personalization.



TASK1: Create the following personalization:

Personalize the Concurrent Program Definition Page with following criteria:

1. The personalization should be valid only for your login

2. *Whenever the control (or your cursor) lands into a new field, a help message should pop up . The help will tell you about the field and how to use it.*