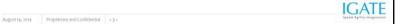


Lesson Objectives Overview Terminology Personalizing a Form Defining Rules Rules Conditions Scope Actions Evaluation of Strings Relationship to Custom Library Limitations

Overview

- The Form Personalization feature is introduced in 11.5.10
- Ths allows you to declaratively alter the behavior of Forms-based screens, including changing properties, executing builtins, displaying messages, and adding menu entries.
- For each function, you can specify one or more Rules.
- Each Rule consists of an Event, an optional Condition, the Scope for which it applies, and one or more Actions to perform.
- Once Rules are defined, when the target function is run then the Rules are automatically applied as events occur within that form.



Terminology

Event

- An Event is a trigger point within a form, such as WHEN-NEW-FORM-INSTANCE, WHEN-NEW-RECORD-INSTANCE.
- There are standard events that almost every form sends, and certain forms send additional product-specific events.

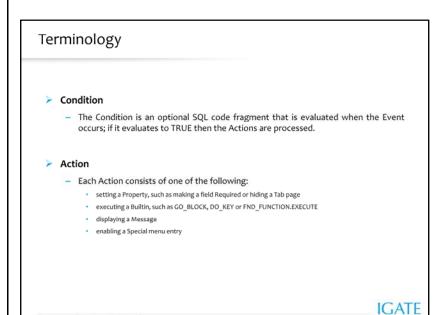
Scope

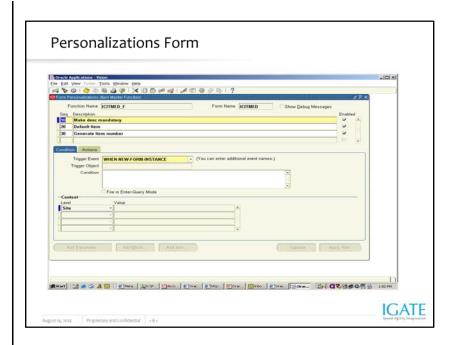
- The Scope is evaluated based on the current runtime context to determine if a Rule should be processed or not.
- The Scope can be at the Site, Responsibility, User, or Industry level. Each Rule can have one or more Scopes associated with it.

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Personalizing a Form

- To create personalizations for a particular function, first invoke that function from the Navigation menu.
- While in the form, choose Help->Diagnostics->Custom Code-> Personalize from the pulldown menu.
- The Personalization form will open and automatically query existing Rules for that function.
- After making changes, Save them then close and re-run the function to have them take effect.
- You can also Validate or Apply certain changes immediately to test them without having to re-run the target form by pressing the 'Validate' or 'Apply Now' buttons.

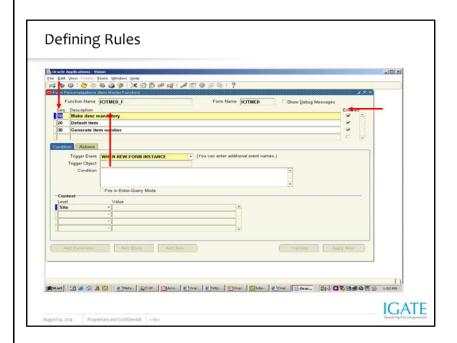
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Personalizing a Form This menu entry is secured by the 'Hide Diagnostics' menu entry and 'Utilities:Diagnostics' profiles, as are most other entries on the Diagnostics menu.

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▶ Each Rule consists of the following fields: Seq: The sequence in which rules will be processed. This is a value between 1 and 100, with 1 being processed first. The sequence of rules does not have to be unique. Note that there is an interaction with the Trigger Event field, described below. Description: Use this field to document the personalization you are making. Enabled: Uncheck this checkbox to temporarily disable processing of a Rule.



Defining Rules - Conditions

Condition tab:

- Trigger Event: Select the event at which you want the Rule to be processed.
 Rules are processed first by matching the Event, then by their Sequence number.
- Trigger Object: Depending on the Trigger Event, this field may be Disabled, or Enabled and Required in which case it will validate against a List of Values.
 - For example, if Trigger Event WHEN-NEW-ITEM-INSTANCE is selected, then you must enter a specific block-field for that trigger to be processed.
- Condition: This is an optional SQL code fragment that is evaluated when the Event occurs; if it evaluates to TRUE then the Actions are processed.

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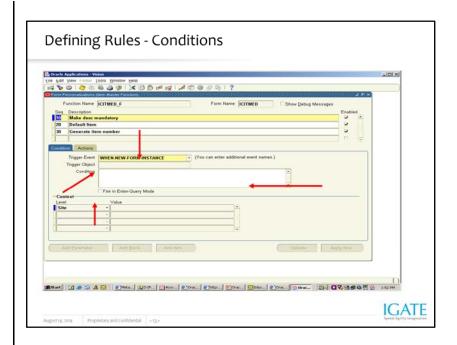


Defining Rules - Conditions

The condition can contain any of the following:

- SQL functions and operators, such as AND, OR, TO_CHAR, DECODE, and NVL
- References to bind variables (:block.field), including :system, :global and :parameter values.
 - Use the 'Add Item...' button to assist with item names.
- Calls to server-side functions that do not have OUT parameters
 The syntax can be tested with the 'Validate' button, which will evaluate it in the current context of the target form.
- Fire in Enter-Query Mode: This checkbox controls whether the Rule should be processed if the event occurs during enter-query mode processing.

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Defining Rules - Scope

The following Scope fields appear in the Context region of the Condition tab:

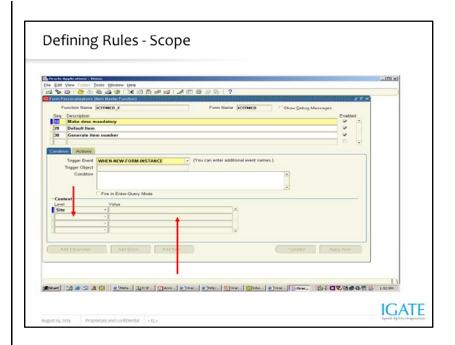
- Level: Select the level at which you want the rule to be applied, either Site, Responsibility, User, or Industry.
- Value: Based on the Level, either Disabled, or Enabled and Required in which case it will validate against a List of Values.

If a Rule has no Scope rows or Action rows, it is not processed.

Upon saving a Rule, if no Scope rows have been entered the form will automatically create a row at the Site level.

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Actions tab:

- Seq: The sequence in which actions will be processed within that Rule. This is a value between 1 and 100, with 1 being processed first. The sequence does not have to be unique.
- Type: The type of action to take

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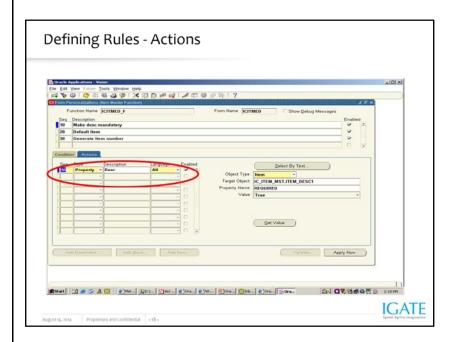
- Property: Allows you to select a specific object, a property of that object, and specify a new value for that property
- Builtin: Allows execution of a standard Forms Builtin, such as GO_BLOCK or DO_KEY
- · Message: Displays a message in one of several styles
- Special: Enables a special menu entry, defining its label, icon name and which blocks it applies to.

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- Description: Use this field to document the personalization action you are making.
- Language: Specify 'All' to have the action processed for any language, or select a specific language. Typically text-related personalizations would be applied for a specific language.
- Enabled: Uncheck this checkbox to temporarily disable processing of the action.
- Apply Now: For several Types, this button will be enabled. It allows you to apply the change immediately to the target form to test its effect.

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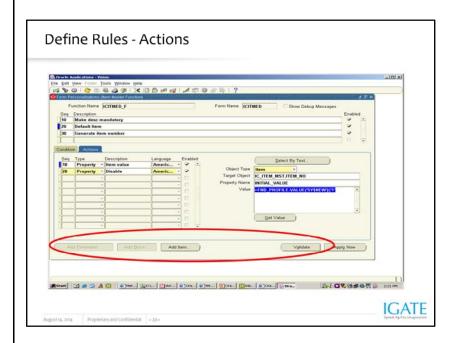


- > The following buttons are enabled conditionally based on the Type field:
 - Add Parameter: List of Values that displays currently used parameters. Applies to the builtin FND_FUNCTION.EXECUTE only.
 - Add Block: List of Values that displays block names.
 - Add Item: List of Values that displays item names.
 - Validate: Used to test if the syntax of your string is valid.

If the evaluation fails, the processing engine will return an ORA error.Otherwise, it will display the text exactly as it would appear at runtime in the current context.

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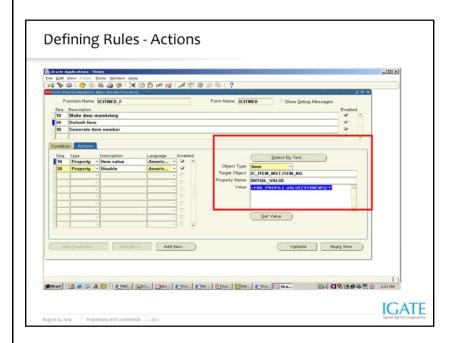
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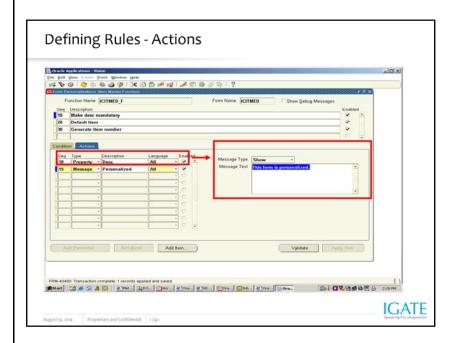


- Some fields appear conditionally based on the Type field.
 - Type: Property
 - Select By Text: Allows you to select an object based on text appearing on the screen at the point in time that you invoke the Personalization form, including any changes that current rules might have performed.
 - Selecting it will automatically fill in the Object Type and Target Object fields
 - object Type: The type of object, including Item, Window, Block, Tab, Canvas, Radio button, View, GLOBAL, or PARAMETER.
 - Target object: The internal name of the object. For Object Types of GLOBAL and PARAMETER, the Target Object name must not include those keywords.
 - Property Name: The properties that can be personalized.
 - · value: The new value.
 - · Get value: This button gets the current property value of the object.

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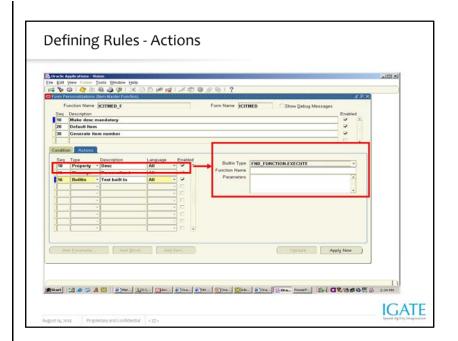


Defining Rules - Actions - Type: Built-in • Builtin Type: The name of the builtin, such as - GO_ITEM - DO_KEY - GO_BLOCK - RAISE FORM_TRIGGER_FAILURE - FORMS_DDL - FND_UTILITIES.OPEN_URL - FND_FUNCTION.EXECUTE • Argument: The argument for the currently selected builtin, if applicable.

- > Depending on the specific builtin, other argument fields may appear.
 - Function Name: The name of the function that should be executed.
 - Parameters: You can manually enter parameters or use the 'Add Parameter...' button.

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- Type: Special

- . Menu Entry: One of 45 menu entries that you can activate.
- Menu Label: The textual label that you want on the menu entry.
- Render line before menu: If checked, will render a line above the menu entry to visually separate it from prior entries.
- Enabled in Block(s): Specify the blocks that you want the menu entry enabled in; specify more than one block by separating the names with a comma.

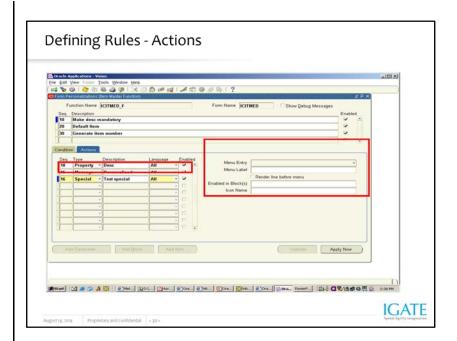
If no blocks are specified, the entry will be enabled in all blocks.

 Icon Name: Specify an optional icon name that you want added to the Toolbar to achieve the same functionality as in the special pulldown menu entry.

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- Specifying an action of 'Special' merely activates the appropriate menu entry.
- When the user selects the entry, it will fire the corresponding SPECIAL# trigger.
- You must must also create another rule that traps this Trigger Event and performs the desired functionality.

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Evaluation of Strings

- Every property that takes a string can either be processed literally or evaluated at runtime.
- If you type a string in that does not start with '=', then the exact value you type in will be used at runtime.
- If the string you type starts with '=', then the text immediately after that character will be evaluated at runtime.
- This allows you to write complex logic that can include references such as:
 - SQL operators, such as ||, TO_CHAR, DECODE, and NVL
 - bind variables (:block.field), including :system, :global and :parameter values.
 - Calls to server-side functions that do not have OUT parameters.
 - SELECT statements.

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Evaluation of Strings

- To use the SELECT form, you must follow these rules:
 - The text must start with '=SELECT'
 - The column being selected must evaluate to a CHAR, with a length no longer than 2000 bytes.
 - You must alias the column being selected to 'A'.
 - Your SELECT statement should only return one row, but if more than one is returned only the value of the first row will be used.

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Relationship to CUSTOM Library

- Form Personalization allows personalizations that could be made in the CUSTOM library.
- It does not require that you use the Oracle Forms Builder to edit and compile the CUSTOM file.
- The CUSTOM library is able to support more complex personalizations because it gives you access to:
 - all of the capabilities of the PL/SQL programming language
 - client-side program units
 - all Oracle Forms builtins
 - issuing any SQL.

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Relationship to CUSTOM Library

- Both Form Personalization and the CUSTOM library drive off the exact same events.
- The Form Personalization feature receives and processes them first, then passes them to the CUSTOM library, thus you can use both mechanisms simultaneously.
- Both features also respond identically to the Custom Code events of 'Normal', 'Off' and 'Core Code Only'.
- In general, Oracle recommends that you use the Form Personalization feature whenever possible, and only use the CUSTOM library when significantly more complex processing is required.

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Limitations

- Form Personalization can only respond to events that are centrally processed and dispatched by APPCORE. These are limited to:
 - WHEN-NEW-FORM-INSTANCE
 - WHEN-NEW-BLOCK-INSTANCE
 - WHENNEW-RECORD-INSTANCE
 - WHEN-NEW-ITEM-INSTANCE.
 - WHEN-VALIDATE-RECORD
 - SPECIAL1 through SPECIAL45.
 - Product-specific events. These are typically documented in implementation manuals.

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Limitations

- You can only change what Oracle Forms allows at runtime. For example, the following cannot be changed:
 - You cannot create new items
 - You cannot move items between canvases
 - You cannot display an item which is not on a canvas (thus, individual flexfield segments cannot be displayed)
 - You cannot set certain properties such as the Datatype of an Item.
 - You cannot change frames, graphics, or boilerplate
 - You cannot hide the item that currently has focus

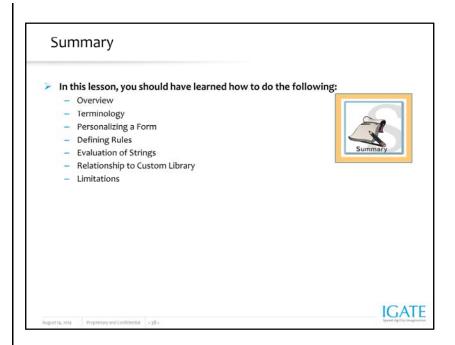
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Demo

Disable the Submit button of order entry form using form personalization.



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Review Questions

- Question 1: Which of the following activity cannot be done using Form Personalization:
 - Create new items
 - Move items between canvases
 - Disable Items
 - Hide the item that currently has focus



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