

# The Power of Personalization in the E- Business Suite

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# A Long Awaited Capability ...

- For centuries, Oracle apps customers have wanted to
  - Remove unused fields, buttons, tabs from the screens
  - Re-label fields, buttons, tips to match their terminology
  - Change the default value of fields
  - Allow easy access from one form to another, passing context
  - Do any of the above for only a particular user or responsibility
  - Do any of the above only if certain conditions are true.
  - Do all of the above without writing code, or “violating” Support
- 11i folder technology, but the 11i10 Personalization capabilities take folders to a new level

# Personalization Features

- Allows you to alter form appearance and behavior
  - Applied at runtime when the trigger event occurs.
  - Applied based on who you are and other conditions
- You can:
  - Change object properties
  - Execute certain Forms built-ins
  - Display messages and additional menu entries
  - Launch processes
- Personalization is a system-administration function

# Personalization Structure

- Associated to a form / function
- Rules / Conditions
- Context (site, responsibility, user)
- Actions

# Rule Structure

- Description, and personalization level, e.g. Form or Function
- Condition (when)
  - The triggering form event, and option form object
  - Additional condition(s)
- Context (who)
  - Site
  - Responsibility
  - User
- Actions (what)

# Rules and Conditions

Form Personalizations (Quick Sales Orders)

Function Name: **ONT\_OEXOETEL**      Form Name: **OEXOETEL**      Debug Mode: **Off**

Seq	Description	Level	Enabled
10	Ord Nbr prompt	Form	<input checked="" type="checkbox"/>
20	demand class	Function	<input checked="" type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

**Condition**    **Actions**

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

Trigger Object:

Condition:

Processing Mode: **Not in Enter-Query Mode**

**Context**

Level	Value
Site	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
	<input type="text"/>

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

# Rules and Conditions

- Be careful when entering a new rule, and the default “Level” is Function
  - The same form launched from different places is a different function
  - Order form launched from the Navigator versus the Organizer
- Trigger Events
  - WHEN-NEW-FORM-INSTANCE : form is first opened
  - WHEN-NEW-BLOCK-INSTANCE : navigating to a block
  - WHEN-NEW-RECORD-INSTANCE : cursor is placed on a record
  - WHEN-NEW-ITEM-INSTANCE : cursor moves to a displayed field

# Actions

Form Personalizations (Quick Sales Orders)

Function Name: **ONT\_OEXOETEL**    Form Name: **OEXOETEL**    Debug Mode: **Off**

Seq	Description	Level	Enabled
10	Ord Nbr prompt	Form	<input checked="" type="checkbox"/>
20	demand class	Function	<input checked="" type="checkbox"/>
		Function	<input checked="" type="checkbox"/>
			<input type="checkbox"/>

Condition    **Actions**

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

Select By Text...

Object Type: **Item**

Target Object: **Window**

Property Name: **Block**

Value: **Tab Page**

Canvas

Radio Button

View

Global Variable

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

# Actions

- “Property” allows you to alter the characteristics of objects in the form, e.g.
  - Make fields required that are not natively required
  - Hide tab pages
  - Display formatting
- “Message” allows you to display a message box with static or variable text
- “Builtin” allows some level of flow and navigation control:
  - Field navigation
  - Launching another form
  - Launching an SRS form
- “Menu” is for defining additional Tools options

# Actions - Property

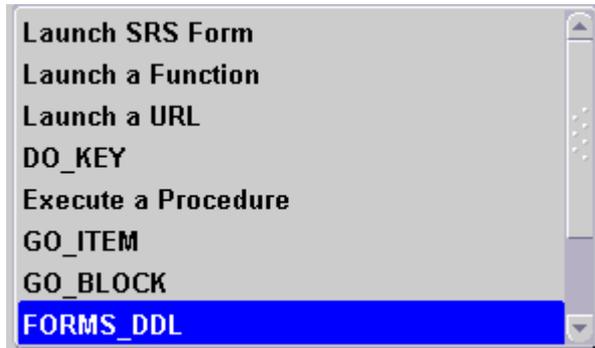
Name
<b>ALTERABLE (APPLICATIONS COVER)</b>
ALTERABLE_PLUS
ALTERABLE_PLUS (APPLICATIONS COVER)
CASE_INSENSITIVE_QUERY
CASE_RESTRICTION
CONCEAL_DATA
DISPLAYED
DISPLAYED (APPLICATIONS COVER)
ECHO
ENABLED
ENABLED (APPLICATIONS COVER)

Name
LOV_NAME
NAVIGABLE (ITEM-INSTANCE)
NEXT_NAVIGATION_ITEM
PREVIOUS_NAVIGATION_ITEM
PROMPT_ALIGNMENT_OFFSET
PROMPT_EDGE_OFFSET
PROMPT_TEXT
QUERYABLE
REQUIRED
REQUIRED (APPLICATIONS COVER)
REQUIRED (ITEM-INSTANCE)

Name
ENTERABLE
ENTERABLE (APPLICATIONS COVER)
FORMAT_MASK
HEIGHT
HINT_TEXT
INITIAL_VALUE
INSERT_ALLOWED
INSERT_ALLOWED (ITEM-INSTANCE)
ITEM_IS_VALID
LABEL
LOCK_RECORD_ON_CHANGE

Name
<b>REQUIRED (ITEM-INSTANCE)</b>
SELECTED_RADIO_BUTTON (ITEM-INSTANCE)
TOOLTIP_TEXT
UPDATE_ALLOWED
UPDATE_ALLOWED (ITEM-INSTANCE)
UPDATE_NULL
VALUE
VISUAL_ATTRIBUTE (ITEM-INSTANCE)
WIDTH
X_POS
Y_POS

# Actions - Builtin

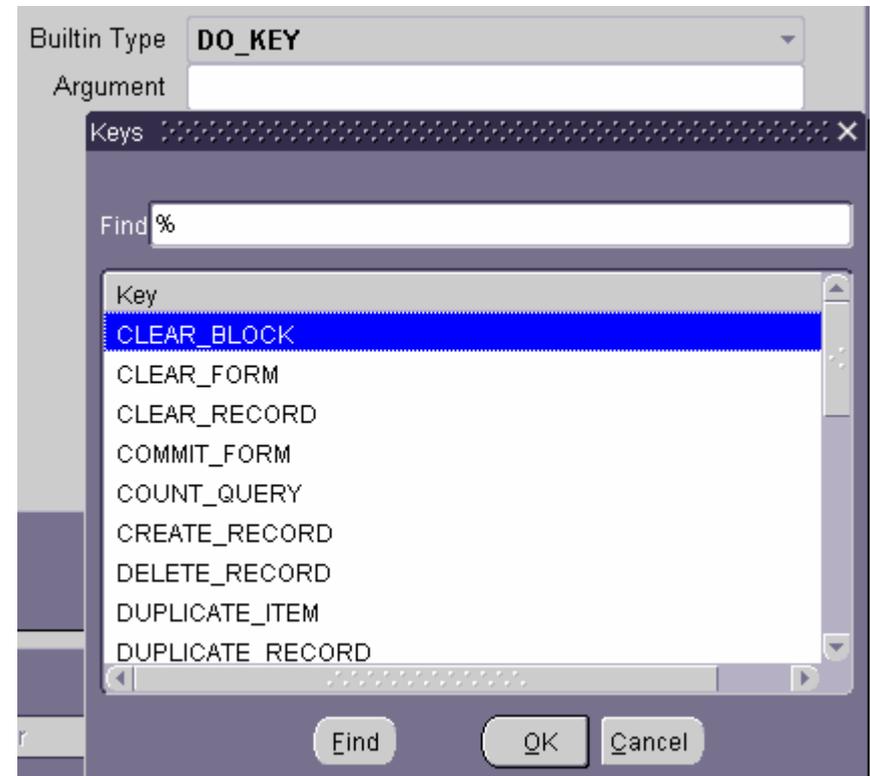


Builtin Type: **Launch a Function**

Function Code:

Function Name:

Parameters:



# Case Study

- Title insurance policy remittance, inventory, and receivables management implementation
  - Agent sells title policy at a “gross premium”
  - Agent keeps from a percent of the gross premium
  - Difference owed to company, and managed through Receivables
- Order entry form must display
  - Gross premium (list price)
  - Gross premium override
  - Net premium (or net override)
- Flexfields not acceptable for data entry of non-standard fields
- Data entry must support 10-key type entry

# Personalized Quick OE Form

Sales Orders (13826) - MORRISSEY, MORRISSEY & DALLUGE

Main **Others**

**Remittance Header - Book - SW**

Agent Id: 1000111      Remittance: 13826  
 Agent: MORRISSEY, MORRISSEY      Status: Closed  
 Remittance Date: 02.26.07      Terms: NET 30  
 State/County: NE,JOHNSON,      Order Source Reference: OE\_ORDER\_HEADFI  
 Order Type: REMITTANCE      Salesperson: No Sales Credit      Total: 190.26

**Address Information**

Ship To Address1: 177 SOUTH THIRD  
 TECUMSEH, NE, 68450  
 Ship To Contact:   
 Bill To Address1: 177 SOUTH THIRD  
 TECUMSEH, NE, 68450  
 Bill To Contact:   
 Address Details

Main **Shipping**

**Remittance Lines W Payment Terms**  Auto Refresh

Line	Policy Number	Liability Amt	File Number	Policy Date	Policy Modifier	County, Add'l Policy Info	Gross Prem	Gross Override	Net	Hold
1.1	OP.6608074	15,500.00	06-162	02.26.07	BASIC	JOHNSON, , , , ,	0.00	138.50	34.63	<input type="checkbox"/>
2.1	OP.6608075	14,400.00	06-151	02.26.07	SIMULTANEOI	JOHNSON, , , , , LP.528182	0.00	135.00	33.75	<input type="checkbox"/>
3.1	LP.5281825	50,000.00	06-155	02.26.07	BASIC	JOHNSON, , , , ,	0.00	257.50	64.38	<input type="checkbox"/>
4.1	LP.5281824	11,300.00	06-151	02.26.07	SIMULTANEOI	JOHNSON, , , , , OP.66080	0.00	75.00	18.75	<input type="checkbox"/>
5.1	FA Form NE1		06-151	02.26.07	ENDORSEMEN	JOHNSON, , , , , LP.528182	25.00		15.00	<input type="checkbox"/>
6.1	FA Form NE1		06-151	02.26.07	ENDORSEMEN	JOHNSON, , , , , LP.528182	25.00		15.00	<input type="checkbox"/>
7.1	MISC. END.		06-155	02.26.07	ENDORSEMEN	JOHNSON, , , , , LP.528182	0.00	35.00	8.75	<input type="checkbox"/>
										<input type="checkbox"/>
										<input type="checkbox"/>
										<input type="checkbox"/>

Description: ALTA Owner's Policy Jacket - 1992

# Personalized Quick OE Form

- Liability Amount and Gross Override Fields are non-used form fields
  - “Liability Amount” = Customer Shipment Number
  - “Gross Override” = Customer Model Serial Number
  - “File Number” = Customer Line Number
- Liability Amount
  - Formatting upon cursor entry into “File Number”
  - Copy value to DFF
- Gross Override personalization
  - Formatting upon cursor entry into “Net” field
- Tools Option to show Remittance (order) totals
- Other validations

# Formatting

Form Personalizations (Quick Sales Orders)

Function Name:  Form Name:  Debug Mode:

Seq	Description	Level	Enabled
17	Reset subinventory if ENTERED, BOOKED, AWAITING SHIPPING and current subinventor does not match	Form	<input checked="" type="checkbox"/>
18	Copy file number when viewing copied line	Form	<input checked="" type="checkbox"/>
20	Liability Amt Format - New Item Instance	Form	<input checked="" type="checkbox"/>
21	Liability Amt Change - Zap Price List to force repricing	Form	<input checked="" type="checkbox"/>

Condition    Actions

Trigger Event:  (You can enter additional event names.)

Trigger Object:

Condition:

Processing Mode:

Context

Level	Value
Site	

# Formatting

Form Personalizations (Quick Sales Orders)

Function Name: **ONT\_OEXOETEL**      Form Name: **OEXOETEL**      Debug Mode: **Off**

Seq	Description	Level	Enabled
17	Reset subinventory if ENTERED, BOOKED, AWAITING SHIPPING and current subinventor does not match	Form	<input checked="" type="checkbox"/>
18	Copy file number when viewing copied line	Form	<input checked="" type="checkbox"/>
20	Liability Amt Format - New Item Instance	Form	<input checked="" type="checkbox"/>
21	Liability Amt Change - Zap Price List to force repricing	Form	<input checked="" type="checkbox"/>

Condition      Actions

Seq	Type	Description	Language	Enabled
10	Property	Format	All	<input checked="" type="checkbox"/>
20	Property	Copy Liability to dff	All	<input checked="" type="checkbox"/>

Object Type: **Item**  
 Target Object: **LINE.CUST\_MODEL\_SERIAL\_NUMBER\_MIR**  
 Property Name: **VALUE**  
 Value: `=decode(:line.cust_model_serial_number, '', '0.00', to_char(to_number(replace(replace(:line.cust_model_serial_number_mir, ','), '')), '999G999G990D99'))`

Get Value      Validate      Apply Now

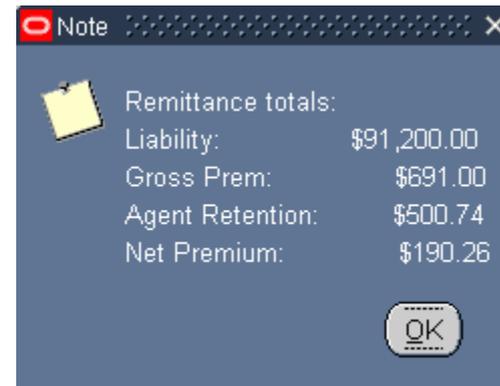
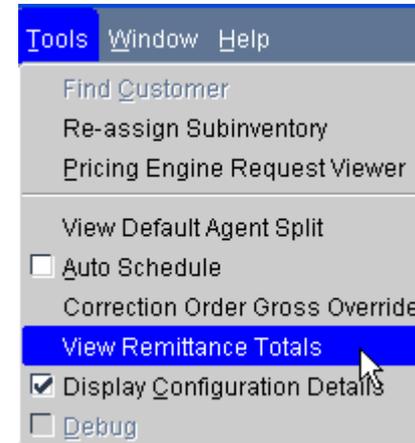
Editor

```
=decode(:line.cust_model_serial_number, '', '0.00', to_char(to_number(replace(replace(:line.cust_model_serial_number_mir, ','), '')), '999G999G990D99'))
```

OK      Cancel      Search

# Remittance Totals

- Add new option to Tools Menu to view relevant totals
- Personalization uses “unused” fields in the form to store data and then display



# Remittance Totals – Define Menu

Form Personalizations (Quick Order Organizer)

Function Name: **ONT\_OEXOETEL\_SUMMARY**    Form Name: **OEXOETEL**    Debug Mode: **Off**

Seq	Description	Level	Enabled
12	<b>Order Totals Menu Option</b>	Form	<input checked="" type="checkbox"/>
12.1	Execute order totals display	Form	<input checked="" type="checkbox"/>
13	Subinventory Re-assign if Inventory is moved	Form	<input checked="" type="checkbox"/>
13.1	Show message if the FORM has uncommitted data	Form	<input checked="" type="checkbox"/>

Condition    Actions

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

Trigger Object:

Form Personalizations (Quick Order Organizer)

Function Name: **ONT\_OEXOETEL\_SUMMARY**    Form Name: **OEXOETEL**    Debug Mode: **Off**

Seq	Description	Level	Enabled
12	<b>Order Totals Menu Option</b>	Form	<input checked="" type="checkbox"/>
12.1	Execute order totals display	Form	<input checked="" type="checkbox"/>
13	Subinventory Re-assign if Inventory is moved	Form	<input checked="" type="checkbox"/>
13.1	Show message if the FORM has uncommitted data	Form	<input checked="" type="checkbox"/>

Condition    Actions

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

Menu Entry: **SPECIAL6: View Remittance Totals**

Menu Label: **View Remittance Totals**

# Remittance Totals - Execute

Form Personalizations (Quick Order Organizer)

Function Name: **ONT\_OEXOETEL\_SUMMARY**      Form Name: **OEXOETEL**      Debug Mode: **Off**

Seq	Description	Level	Enabled
12	Order Totals Menu Option	Form	<input checked="" type="checkbox"/>
12.1	Execute order totals display	Form	<input checked="" type="checkbox"/>
13	Subinventory Re-assign if Inventory is moved	Form	<input checked="" type="checkbox"/>
13.1	Show message if the FORM has uncommitted data	Form	<input checked="" type="checkbox"/>

Condition    Actions

Trigger Event: **SPECIAL6** (You can enter additional event names.)

Trigger Object:

# Remittance Totals - Execute

Form Personalizations (Quick Order Organizer)

Function Name: **ONT\_OEXOETEL\_SUMMARY**    Form Name: **OEXOETEL**    Debug Mode: **Off**

Seq	Description	Level	Enabled
12	Order Totals Menu Option	Form	<input checked="" type="checkbox"/>
12.1	Execute order totals display	Form	<input checked="" type="checkbox"/>
13	Subinventory Re-assign if Inventory is moved	Form	<input checked="" type="checkbox"/>
13.1	Show message if the FORM has uncommitted data	Form	<input checked="" type="checkbox"/>

Condition    **Actions**

Seq	Type	Description	Language	Enabled
5	Property	set hdr id (13)	All	<input checked="" type="checkbox"/>
6	Property	set total (14)	All	<input checked="" type="checkbox"/>
10	Property	sum liability (10)	All	<input checked="" type="checkbox"/>
11	Property	sum gross (11)	All	<input checked="" type="checkbox"/>
12	Property	sum agentreten (12)	All	<input checked="" type="checkbox"/>
13	Message	message	All	<input checked="" type="checkbox"/>
14	Property	clear att10	All	<input checked="" type="checkbox"/>
15	Property	clear att11	All	<input checked="" type="checkbox"/>
16	Property	clear att12	All	<input checked="" type="checkbox"/>
17	Property	clear att13	All	<input checked="" type="checkbox"/>

Select By Text...

Object Type: **Item**

Target Object: **FIND.ATTRIBUTE14**

Property Name: **VALUE**

Value: `= select replace(to_char(decode(:system.current_block,'ORDERS_SUMMARY',:orders_summary.total,:order.total)),',') a`

Get Value

# Remittance Totals - Execute

Form Personalizations (Quick Order Organizer)

Function Name: **ONT\_OEXOETEL\_SUMMARY**      Form Name: **OEXOETEL**      Debug Mode: **Off**

Seq	Description	Level	Enabled
12	Order Totals Menu Option	Form	<input checked="" type="checkbox"/>
12.1	Execute order totals display	Form	<input checked="" type="checkbox"/>
13	Subinventory Re-assign if Inventory is moved	Form	<input checked="" type="checkbox"/>
13.1	Show message if the FORM has uncommitted data	Form	<input checked="" type="checkbox"/>

Condition      Actions

Seq	Type	Description	Language	Enabled
5	Property	set hdr id (13)	All	<input checked="" type="checkbox"/>
6	Property	set total (14)	All	<input checked="" type="checkbox"/>
10	Property	sum liability (10)	All	<input checked="" type="checkbox"/>
11	Property	sum gross (11)	All	<input checked="" type="checkbox"/>
12	Property	sum agentreten (12)	All	<input checked="" type="checkbox"/>
13	Message	message	All	<input checked="" type="checkbox"/>
14	Property	clear att10	All	<input checked="" type="checkbox"/>
15	Property	clear att11	All	<input checked="" type="checkbox"/>
16	Property	clear att12	All	<input checked="" type="checkbox"/>
17	Property	clear att13	All	<input checked="" type="checkbox"/>

Message Type: **Show**

Editor

```

='Remittance totals:
Liability:' || lpad(to_char(find.attribute10,$999,999,999.00),26) || '
Gross Prem:' || lpad(to_char(find.attribute11,$999,999,999.00),22) || '
Agent Retention:' || lpad(to_char(find.attribute12,$999,999,999.00),16) || '
Net Premium:' || lpad(to_char(find.attribute14,$999,999,999.00),21)
    
```

OK      Cancel      Search

# Remittance Totals - Execute

Form Personalizations (Quick Order Organizer)

Function Name: **ONT\_OEXOETEL\_SUMMARY**    Form Name: **OEXOETEL**    Debug Mode: **Off**

Seq	Description	Level	Enabled
12	Order Totals Menu Option	Form	<input checked="" type="checkbox"/>
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Condition    Actions

Seq	Type	Description	Language	Enabled
5	Property	set hdr id (13)	All	<input checked="" type="checkbox"/>
6	Property	set total (14)	All	<input checked="" type="checkbox"/>
10	Property	sum liability (10)	All	<input checked="" type="checkbox"/>
11	Property	sum gross (11)	All	<input checked="" type="checkbox"/>
12	Property	sum agentreten (12)	All	<input checked="" type="checkbox"/>
13	Message	message	All	<input checked="" type="checkbox"/>
14	Property	clear att10	All	<input checked="" type="checkbox"/>
15	Property	clear att11	All	<input checked="" type="checkbox"/>
16	Property	clear att12	All	<input checked="" type="checkbox"/>
17	Property	clear att13	All	<input checked="" type="checkbox"/>

Select By Text...

Object Type: **Item**

Target Object: **FIND.ATTRIBUTE10**

Property Name: **VALUE**

Value: **=null**

Get Value

# Other Applications, Lessons Learned

## Uses of Personalization

- Appearance of non-folder enabled forms
- Navigation control
- Rule-based field defaulting and required fields
- Complex data validation
- Field-level security
- Information display: messages, “tool tips”
- Report launching
- Script launching

## Lessons Learned

- Personalize first, then folderize
- Test until you can't test any more
- Be very careful when copying / altering fields in the form
- Trigger behavior is not always as expected, especially NEW-ITEM-INSTANCE triggers (make sure you test)
- Be aware of navigation restrictions
  - Formatting
  - Validation control
- Did I mention testing?

# Thank You!

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