

# Forms Personalization

Presented by

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# Introduction

- Talbott Jones

- Consultant for Colibri Information Management
- BSBA 1978 – Old Dominion University
- MBA 1990 – Old Dominion University
- CPA 1985 – Virginia
- 1997 Began working with Oracle Applications
  - General Ledger
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- Provides services “Exclusively” for Oracle Applications and RDBMS
- Each consultant has a minimum of 8 years Oracle experience.
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  - <http://www.Colibrilimited.com>



# Topics

- Basics
- Create Personalizations
  - Field Required
  - Insert Default
  - Display Message
  - Hide Button
  - Populate Field With One Of Three Possible Values
  - Display Warning
- Documentation
- Migration

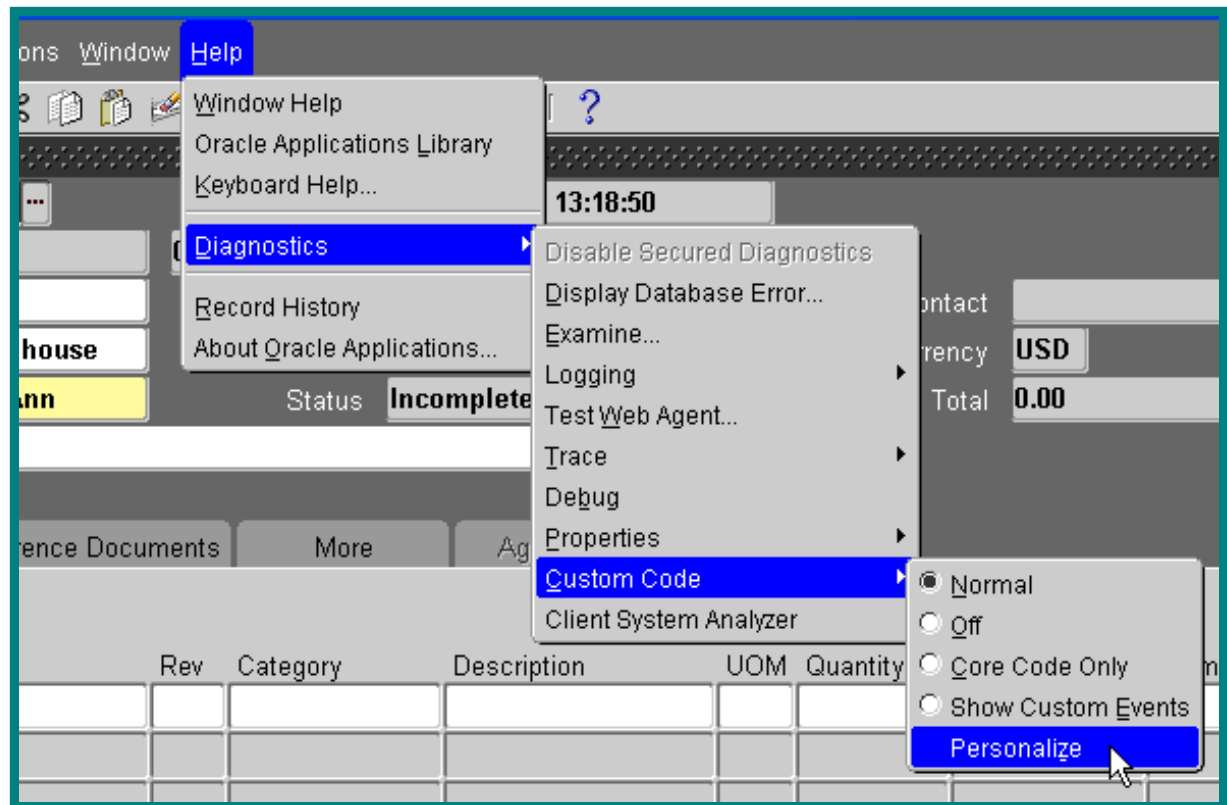


# Basics - Access

- Access to Forms Personalization
  - Requires **Apps Password**
  - or*
  - Profile setting **Utilities:Diagnostics = Yes**
- Access to the form being Personalized

# Access

- Navigate to the form being personalized
  - Help
  - Diagnostics
  - Custom Code
  - Personalize



# Forms Personalization Form

Form Personalizations (Purchase Orders)

Function Name **PO\_POXPOEPO** Form Name **POXPOEPO** Debug Mode **Off**

Seq	Description	Level	Enabled
1	Revision Required	Function	<input checked="" type="checkbox"/>
2	Revision Default to most recent	Form	<input checked="" type="checkbox"/>
3	Item Pending Effectivity	Form	<input checked="" type="checkbox"/>
4	ASL Lookup	Form	<input checked="" type="checkbox"/>

Condition Actions

Trigger Event **WHEN-VALIDATE-RECORD** (You can enter additional event names.)

Trigger Object **PO\_LINES**

Condition

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

Context

Level	Value
<b>Site</b>	

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

# Personalization Header

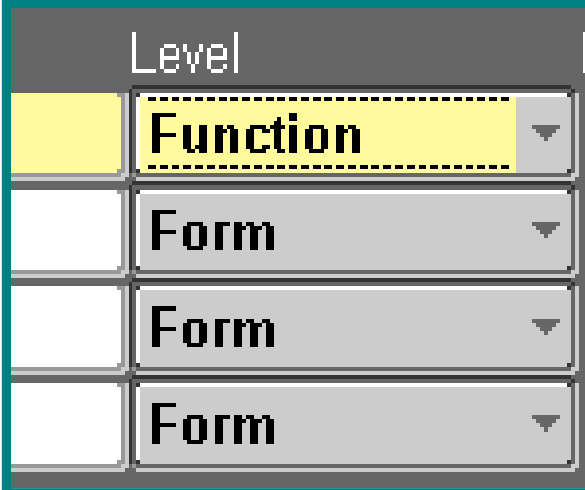
Function Name	PO_POXPOEPO	Form Name	POXPOEPO	Debug Mode	Off
Seq	Description	Level	Enabled		
1	Revision Required	Function	<input checked="" type="checkbox"/>		
2	Revision Default to most recent	Form	<input checked="" type="checkbox"/>		
3	Item Pending Effectivity	Form	<input checked="" type="checkbox"/>		
4	ASL Lookup	Form	<input checked="" type="checkbox"/>		

- Function Name – How you got here
- Form Name – How Oracle identifies this form
- Input Area
  - Seq – Order in which personalizations are performed
  - Description
  - Level – Form / Function



# Header - Continued

- Select Form or Function
  - Form if this personalization is to be done every time the form is used
  - Function, if just when this function is being called.



A screenshot of a software interface showing a dropdown menu titled "Level". The menu is open, displaying four options: "Function", "Form", "Form", and "Form". The "Function" option is highlighted with a yellow background and a dashed border. The other three "Form" options have a grey background. Each option has a small downward-pointing arrow on its right side.

A form can be called by more than one function. This helps you be more selective about when a Forms Personalization is invoked.

# Header - Continued

- Form / Function – Does it matter?
  - If you are not sure where a form is used, select Function.
  - If you want to cover every possible use of the form, select form.
  - If you use Function and look at the form's personalizations in another function, you will see gaps in your list.

# Condition Tab

Condition Actions

Trigger Event **WHEN-VALIDATE-RECORD** (You can enter additional event names.)

Trigger Object **PO\_LINES**

Condition

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

Context

Level	Value
<b>Site</b>	

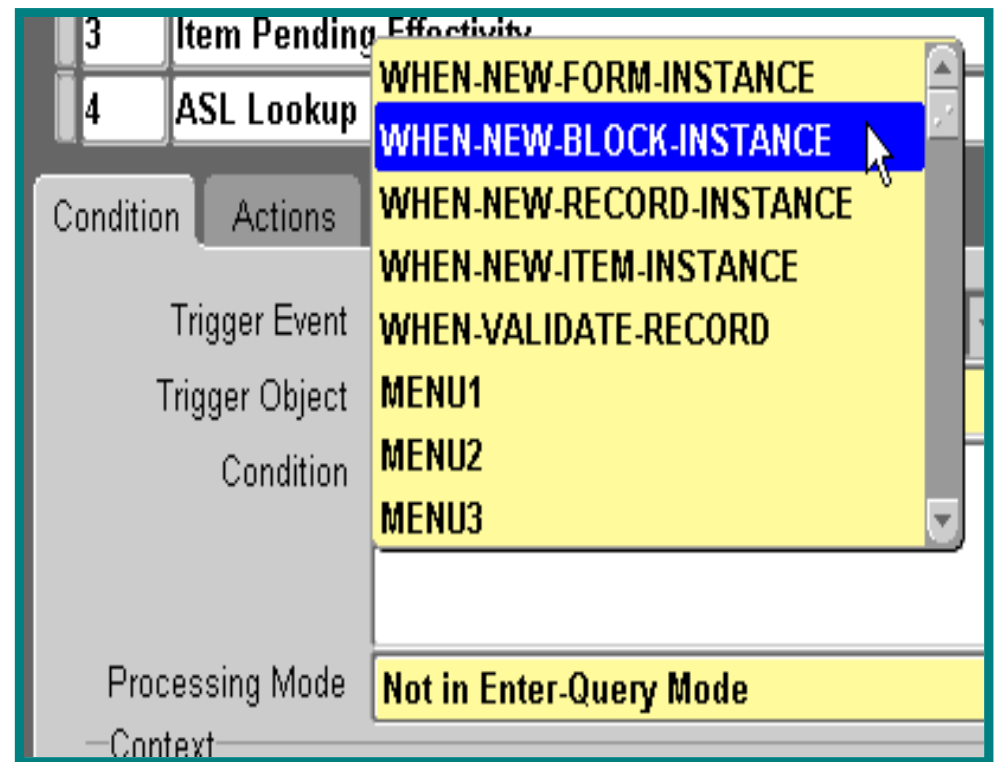
# Condition Tab Elements

- **Trigger Event** – What event will invoke this personalization?
- **Trigger Object** – The event relates to this object.
- **Condition** – What must be true to allow your personalization to be invoked?
- **Processing Mode** – This personalization works in Query Mode / Not in Query Mode or in either mode.
  - We will not be discussing Query Mode Personalizations today.

# Trigger Events

This event invokes your personalization

- New form
- Navigate to a new block
- Navigate to a new item
- Validate a record
- Menus and Special
  - (not covered today)



# Trigger Object

Condition	Actions
Trigger Event	WHEN-NEW-BLOCK-INSTANCE
Trigger Object	LOT_ENTRY
Condition	

Condition	Actions
Trigger Event	WHEN-NEW-ITEM-INSTANCE
Trigger Object	PO_LINES.ITEM_NUMBER
Condition	:PO_LINES.ITEM_NUMBER IS NOT NULL

Condition	Actions
Trigger Event	WHEN-NEW-FORM-INSTANCE
Trigger Object	
Condition	

- Trigger Object relates to the Trigger Event
  - If the event is a new block, the object is a block.
  - If the event is a new item, the object is a block and item combination.
  - Some events do not require an object.

# Trigger Object

- How do you know what to use for a block or item?

Focus on desired field.

Num	Type	Item	Rev	Category	Description
1	Goods	10600497	--C	NEW.MISC.	LABEL STOCK 8 X 6

Help  
Diagnostics  
Examine

- Help
- Window Help
- Oracle Applications Library
- Keyboard Help...
- Diagnostics**
  - Disable Secured Diagnostics
  - Display Database Error...
  - Examine**
  - Logging
  - Test Web Agent...
- Record History
- About Oracle Applications...

Status: Incomplete

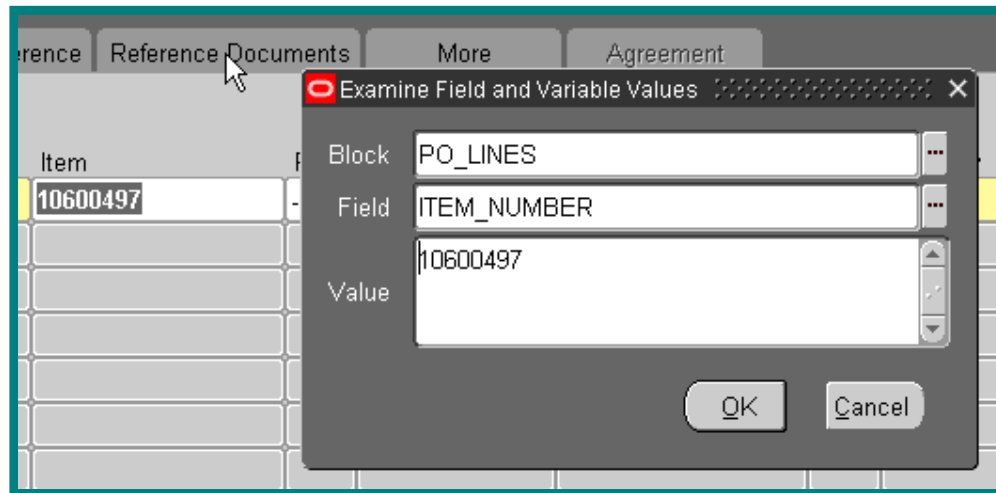
Examine Field and Variable Values

Block	PO_LINES
Field	ITEM_NUMBER
Value	10600497

OK Cancel

# Careful With Examine!

- Look but don't touch.





# Condition

- Null (blank) means every time.
- You can add restrictions.
- Data from the form is referenced by a colon “:”.
- Partial SQL statements

Below, the condition says “if the lot number is 0”.

Block = LOT\_ENTRY

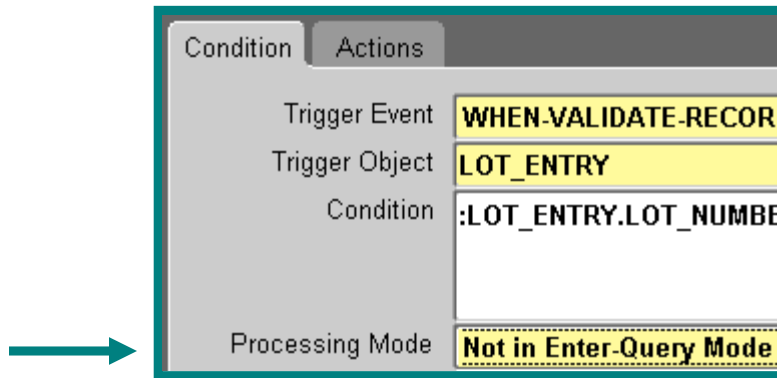
Item = LOT\_NUMBER

Format

:<BLOCK>.<ITEM>

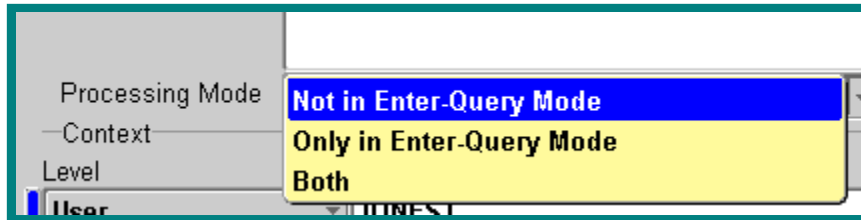
Condition	Actions
Trigger Event	WHEN-VALIDATE-RECORD
Trigger Object	LOT_ENTRY
Condition	:LOT_ENTRY.LOT_NUMBER = 0

# Processing Mode



Forms Personalizations can be done in...

- Query Mode
- Not in Query Mode
- Both



Today, we will be talking about "Not in Query Mode".

# Context

For whom does the personalization work?

Level	Value
Site	

Level	Value
Industry	
Site	
Responsibility	
User	

- **Site** – Everyone
- **Responsibility** – Designate a responsibility in the value column
- **User** – Designate a user in the value column.

# Context Hint

When developing, assign the personalization to yourself to avoid affecting other users (even though you should be in a test instance).

Context	
Level	Value
User	JONEST

# Actions Tab

Condition Actions

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

Select By Text...

Object Type: **Item**

Target Object: **RCV\_CONTROL.INSPECTION\_BUT**

Property Name: **DISPLAYED**

Value: **FALSE**

Get Value

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

# Actions Tab Elements

- **Seq** – Multiple actions can be assigned. This indicates the sequence of these actions.
- **Type** – Action types are
  - Property – assigns a property to a target object.
  - Message – Displays a message
  - Builtin – calls custom code or function (not covered today)
  - Menu – change or add a menu selection (not covered today)
- **Description** – Optional
- **Language**
- **Enabled**



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

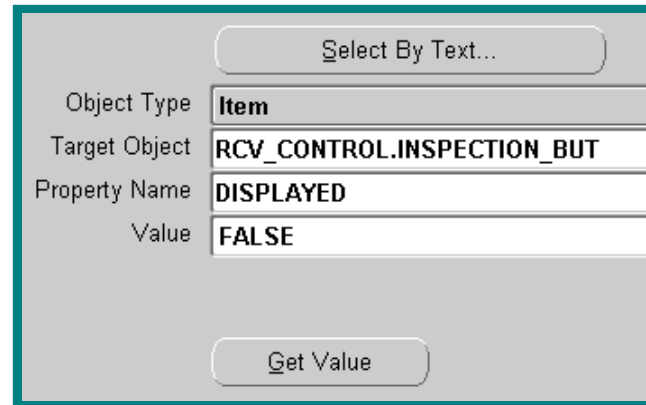
# Actions Tab

## Right Hand Side

The right hand side of the Actions tab changes depending upon the Action Type.

Today, we will discuss two action types:

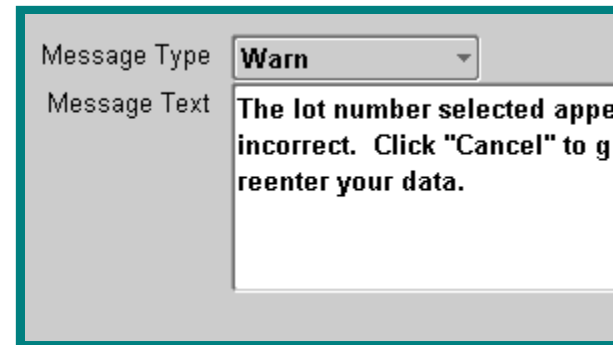
- Property
- Message



A screenshot of the Actions Tab configuration interface for a Property action type. The interface is enclosed in a teal border. At the top right is a button labeled "Select By Text...". Below it, the configuration is as follows:

Object Type	Item
Target Object	RCV_CONTROL.INSPECTION_BUT
Property Name	DISPLAYED
Value	FALSE

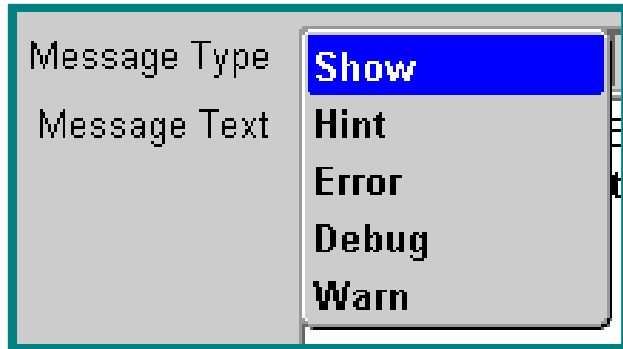
At the bottom center is a button labeled "Get Value".



A screenshot of the Actions Tab configuration interface for a Message action type. The interface is enclosed in a teal border. The configuration is as follows:

Message Type	Warn
Message Text	The lot number selected appears incorrect. Click "Cancel" to go back and reenter your data.

# Action Type - Message



If the Action Type is Message, select a message type:

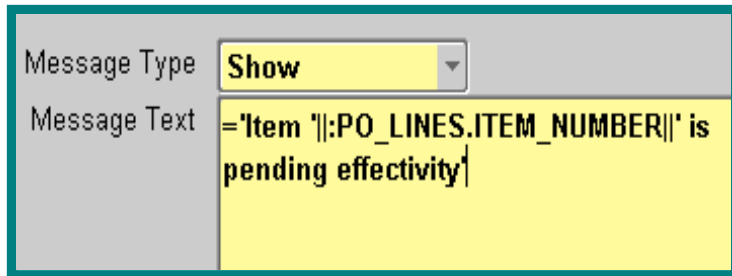
- **Show** – display only
- **Hint** – Not covered today.
- **Error** – Stops commit (save) and gives a reason (maybe).
- **Debug** – Not covered today
- **Warn** – Allows the user to choose to proceed or not.



# Message Text

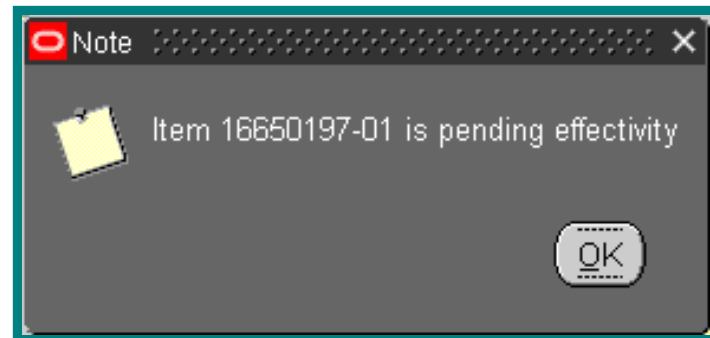
Text can be simple, or it can have elements of SQL.

This example uses information from the form in the text displayed. The Item Number is imbedded in the message.



Message Type: Show

Message Text: =Item '||:PO\_LINES.ITEM\_NUMBER||' is pending effectivity



# Action Type - Property

There are 50 available properties.

Examples:

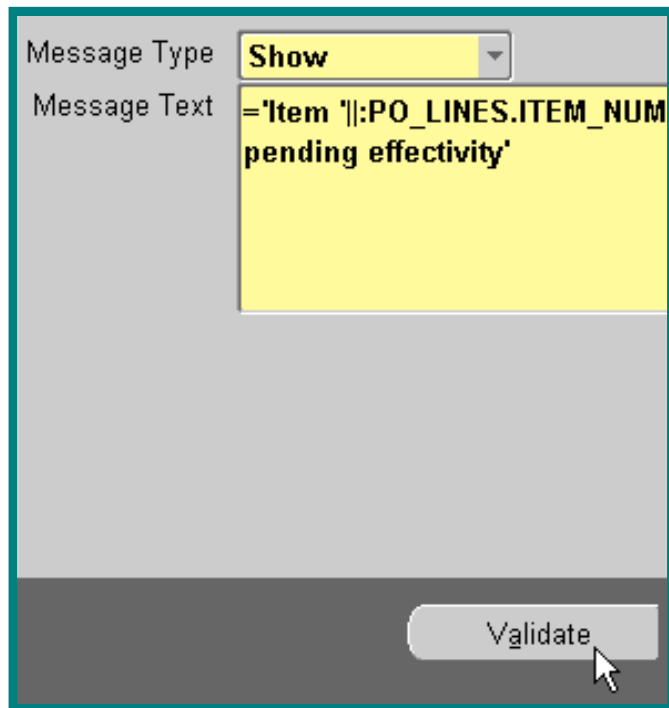
- Value – Contents of the field.
- Required – True/False (required or not required)
- Enterable – True/False (field can be entered or cannot be entered)

<input type="button" value="Select By Text..."/>	
Object Type	Item
Target Object	PO_LINES.ITEM_REVISION
Property Name	VALUE
Value	=SELECT A from ( select SEQUENCE

<input type="button" value="Select By Text..."/>	
Object Type	Item
Target Object	PO_LINES.ITEM_REVISION
Property Name	REQUIRED
Value	TRUE

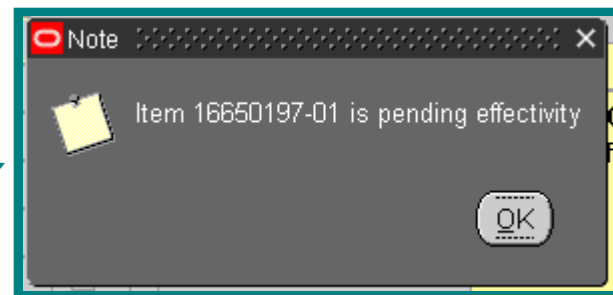
# Validate

Use the Validate button to test your Personalization



The screenshot shows a form with a 'Message Type' dropdown set to 'Show'. The 'Message Text' field contains the text: '=Item '||:PO\_LINES.ITEM\_NUM pending effectivity''. At the bottom right of the form is a 'Validate' button with a mouse cursor hovering over it.

Click "Validate" and if your Personalization works, the message pops up.



# Examples

## Purchase Order form

1. Field Required
  - Item Revision
1. Insert Default Value
  - Revision Default
1. Display a message
  - Pending Effectivity

## Receiving Transactions form

4. Hide Button
  - Inspection Button
5. Populate Field
  - Lot Number
5. Display Warning
  - Supplier Lot missing

# Ex. 1 – Field Required

Navigate to the form to be personalized. In this case, the Purchase Order.

Operating Unit  Created 25-OCT-2009 22:39:57  
PO, Rev  0 Type Standard Purchase Order  
Supplier  Site   
Ship-To  Bill-To  Contact   
Buyer  Status Incomplete Currency   
Description  Total 0.00

Num	Type	Item	Rev	Category	Description	UOM	Quantity	Price	Promised

Item

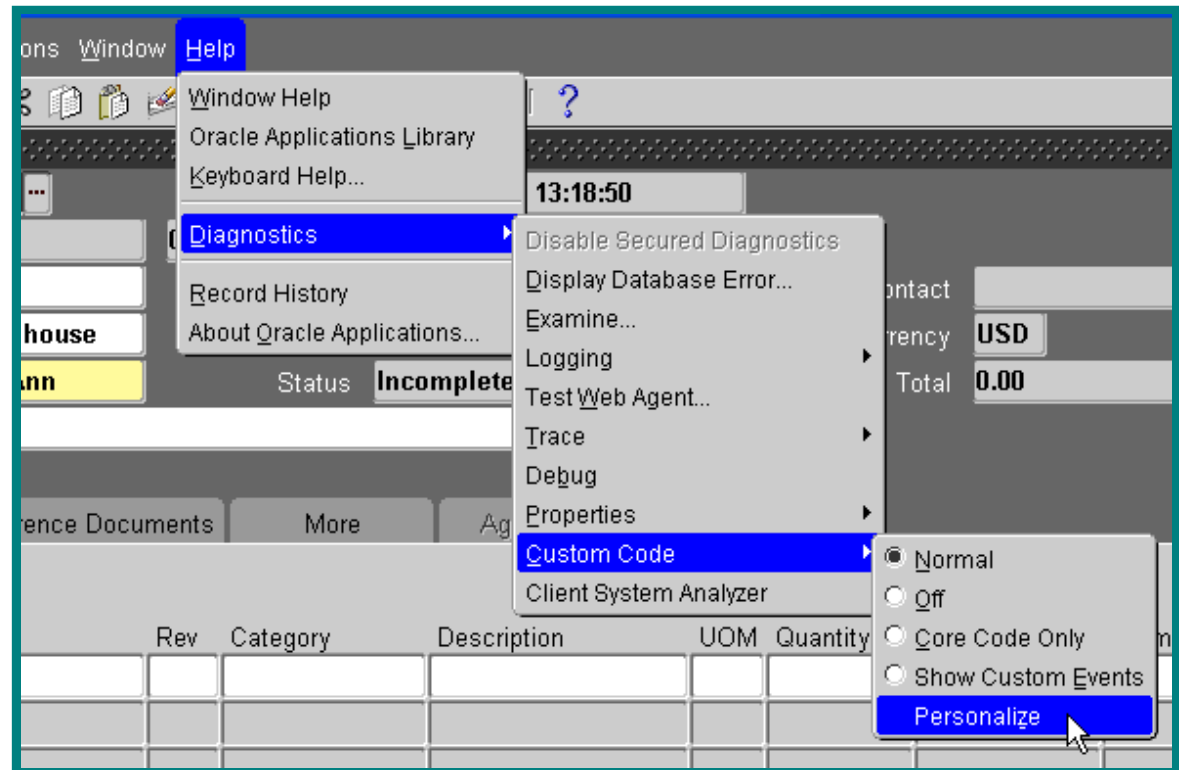
Catalog... Currency... Terms Shipments Approve...

Record: 1/1 ... List of Valu... <OSC>

# Ex. 1 – Field Required

## Navigate to Forms Personalization

- **Help**
- **Diagnostics**
- **Custom Code**
- **Personalize**



# Ex. 1 – Field Required

Our example is *PO Revision Required*

**Why:** For every item ordered, the business requires a revision number. On this form, the revision number is not required.

# Ex. 1 – Field Required

Form Personalizations (Purchase Orders)

Function Name: **PO\_POXPOEPO**      Form Name: **POXPOEPO**      Debug Mode: **Off**

Seq	Description	Level	Enabled
<b>1</b>	<b>Revision Required</b>	<b>Function</b>	<input checked="" type="checkbox"/>
2	Revision Default to most recent	Form	<input checked="" type="checkbox"/>
3	Item Pending Effectivity	Form	<input checked="" type="checkbox"/>
4	ASL Lookup	Form	<input checked="" type="checkbox"/>

Condition      Actions

Trigger Event: **WHEN-VALIDATE-RECORD** (You can enter additional event names.)

Trigger Object: **PO\_LINES**

Condition:

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

— Context —

Level	Value
<b>Site</b>	

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



# Ex. 1 – Field Required

Function Name	PO_POXPOEPO	Form Name	POXPOEPO	Debug Mode	Off
Seq	Description	Level	Enabled		
1	Revision Required	Function	<input checked="" type="checkbox"/>		

- Complete the Header section.
  - Seq = 1
  - Description = Revision Required
  - Level = Function
  - Enabled is checked

# Ex. 1 – Field Required

Complete the Condition Tab.

The screenshot shows a 'Condition' configuration window with the following fields:

- Trigger Event: WHEN-VALIDATE-RECORD (You can enter additional event names.)
- Trigger Object: PO\_LINES
- Condition: (Empty)
- Processing Mode: Not in Enter-Query Mode
- Context: Site

A callout box contains the following text:

- Trigger Event = When Validate Record
- Trigger Object = PO\_LINES
- Condition is null
- Processing Mode = Not in Enter Query Mode
- Context = Site (no value needed)

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

# Ex. 1 – Field Required

## Complete Actions Tab

- Seq = 1
- Type = Property
- Object Type = Item
- Target Object = PO\_LINES.ITEM\_REVISION
- Property Name = Required
- Property Value = True

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

Select By Text...

Object Type: **Item**

Target Object: **PO\_LINES.ITEM\_REVISION**

Property Name: **REQUIRED**

Value: **TRUE**

Get Value

# Ex. 1 – Field Required

- Save your work!
- When this form is used in the future, the field will be required.

# Ex. 2 – Insert Default Value

## Revision Default to Highest Value

Why: The business wants to minimize mistakes on purchase orders. Unless there is a special need, the default revision should be the most recent.

# Ex. 2 – Insert Default Value

Function Name	PO_POXPOEPO	Form Name	POXPOEPO	Debug Mode	Off
Seq	Description	Level	Enabled		
1	Revision Required	Function	<input checked="" type="checkbox"/>		
2	Revision Default to most recent	Form	<input checked="" type="checkbox"/>		

We are already in the form from example 1.

- Complete the Header section.
  - Seq = 2
  - Description = Revision Default is most recent
  - Level = Form
  - Enabled is checked

# Ex. 2 – Insert Default Value

## Complete the Conditions Tab

The screenshot shows the 'Conditions' tab in Oracle Forms Personalization. The 'Trigger Event' is set to 'WHEN-NEW-ITEM-INSTANCE'. The 'Trigger Object' is 'PO\_LINES.ITEM\_REVISION'. The 'Condition' is ':PO\_LINES.ITEM\_REVISION IS NULL AND :PO\_LINES.ITEM\_NUMBER IS NOT NULL'. The 'Processing Mode' is 'Not in Enter-Query Mode'. The 'Context' is set to 'Site'.

- Trigger Event = When New Item Instance
- Trigger Object = PO\_LINES.ITEM\_REVISION
- Context Level = Site
- No Context Value is needed.

Condition =

:PO\_LINES.ITEM\_REVISION IS NULL AND  
:PO\_LINES.ITEM\_NUMBER IS NOT NULL

# Ex. 2 – Insert Default Value

Condition explained...

:PO\_LINES.ITEM\_REVISION IS NULL AND  
:PO\_LINES.ITEM\_NUMBER IS NOT NULL

This means...

The item revision is blank, but the item number is not blank. If this is true, the personalization will be invoked.



# Ex. 2 – Insert Default Value

## Complete the Actions Tab

- SEQ = 1
- Type = Property
- Object Type = Item
- Object Target = PO\_LINES.ITEM\_REVISION
- Property Name = Value

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

Object Type	Item
Target Object	PO_LINES.ITEM_REVISION
Property Name	VALUE
Value	=SELECT A from (

# Ex. 2 – Insert Default Value

## Actions Tab Continued

Complete the Value section...

- A SQL statement

	Select By Text...
Object Type	Item
Target Object	PO LINES.ITEM REVISION
Property Name	VALUE
Value	=SELECT A from ( select ITEMS
	Get Value

# Ex. 2 – Insert Default Value

This SQL statement selects the highest valued revision, according to the method used by Oracle.

A SQL statement for this purpose can only return a single value, otherwise an error results. This makes sense, because only one value can be placed into the field.

The item number as delivered by the form is used at the bottom. You can see the :PO\_LINES, which is the block.

```
=SELECT A
from (
select
  I.SEGMENT1
  , max(R.revision) A
FROM
  INV.MTL_ITEM_REVISIONS_B R
  ,APPS.MTL_SYSTEM_ITEMS_FVL I
WHERE
  R.inventory_item_id (+) = I.inventory_item_id
  AND R.organization_id (+) = I.organization_id
  AND I.ORGANIZATION_ID = 167
  AND SEGMENT1 = :PO_LINES.ITEM_NUMBER
group by segment1
)
```

# Ex. 3 – Display a Message

## Display a Pending Effectivity Message

Why? The business wants purchasing agents to be aware of an expected change to an item when placing an order. They may decide to order less of the item, or defer the purchase altogether.

# Ex. 3 – Display a Message

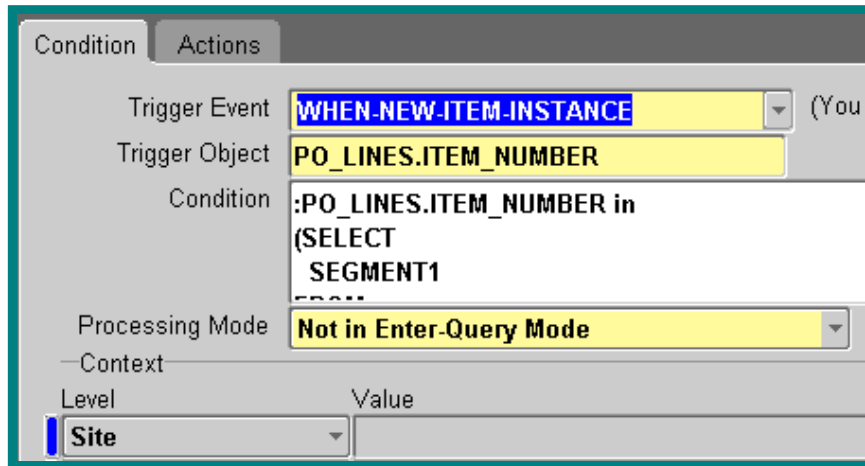
Function Name	PO_POXPOEPO	Form Name	POXPOEPO	Debug Mode	Off
Seq	Description	Level	Enabled		
1	Revision Required	Function	<input checked="" type="checkbox"/>		
2	Revision Default to most recent	Form	<input checked="" type="checkbox"/>		
3	Item Pending Effectivity	Form	<input checked="" type="checkbox"/>		

We are already in the form from example 1.

- Complete the Header section.
  - Seq = 3
  - Description = Item Pending Effectivity
  - Level = Form
  - Enabled is checked

# Ex. 3 – Display a Message

## Complete the Conditions Tab



The screenshot shows a configuration window with two tabs: 'Condition' and 'Actions'. The 'Condition' tab is active. The fields are as follows:

- Trigger Event: WHEN-NEW-ITEM-INSTANCE (dropdown)
- Trigger Object: PO\_LINES.ITEM\_NUMBER (dropdown)
- Condition: :PO\_LINES.ITEM\_NUMBER in (SELECT SEGMENT1 FROM ...)
- Processing Mode: Not in Enter-Query Mode (dropdown)
- Context: (empty)
- Level: Site (dropdown)
- Value: (empty)

- Trigger Event = When New Item Instance
- Trigger Object = PO\_LINES.ITEM\_NUMBER
- Context Level = Site
- No Context Value is needed.

Condition = a SQL statement (next slide)

# Ex. 3 – Display a Message

This Condition is a SQL Statement.

This is looking for a flag in a descriptive flex field (DFF) for the item.

If the item number is among those that have this attribute, the personalization will be invoked.

```
:PO_LINES.ITEM_NUMBER in  
(SELECT  
  SEGMENT1  
FROM  
  APPS.MTL_SYSTEM_ITEMS_B  
WHERE  
  ATTRIBUTE17 = 'Y')
```

# Ex. 3 – Display a Message

Complete the Actions Tab.

- Seq = 1
- Type = Message
- Message Type = Show
- Message Text = a partial SQL statement

Condition Actions

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

Message Type: Show

Message Text: = 'Item '||:PO\_LINES.ITEM\_NUMBER||' is pending effectivity'



# Ex. 3 – Display a Message

## Message Text

= 'Item '||:PO\_LINES.ITEM\_NUMBER||' is pending effectivity'

This message text includes elements of SQL, but is very simple.

“=” tells the system this is going to be a SQL statement.

‘Item ‘ is plain text.

|| concatenates text with :PO\_LINES.ITEM\_NUMBER  
(:<Block>.<Item>)

|| attaches the “ is pending effectivity “

# Ex. 4 – Hide Button

## Hide Inspection Button on The Receiving Transactions Form

**Why?** Warehouse receivers are not permitted to also inspect. That duty is restricted to QA. However, access to the form is needed for other reasons. Thus, the business wants to hide the button only for a particular responsibility.

**Note:** No SQL is involved in this personalization.

# Ex. 4 – Hide Button

Navigate to the Receiving Transactions Form

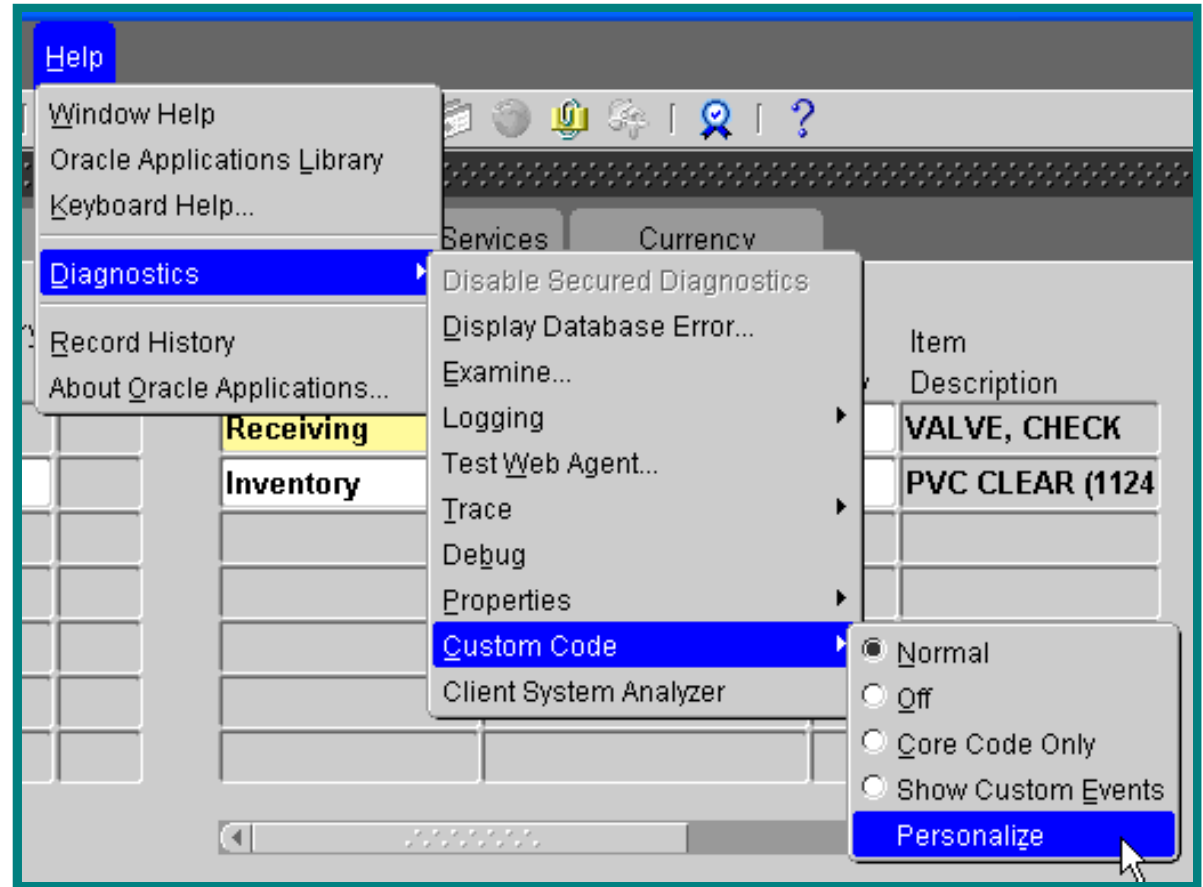
The screenshot shows the 'Receiving Transactions (GLF)' window. It features a table with columns for Quantity, UOM, Destination Type, Item, Rev, and Description. The first row is highlighted in yellow and shows '1500 Each' for 'Receiving' of item '10045986' (VALVE, CHECK). The second row shows '1000 Poun' for 'Inventory' of item '12000157' (PVC CLEAR (1124)). Below the table are several input fields for Operating Unit, Supplier (B. Braun Medical, Inc.), Description (VALVE, CHECK), Destination, Receipt (500002), Order (10009), Parent Type (Receive), Inspection (Not Inspected - Inspec), Current Location (GLF Materials Warehc), and Shipment Receiver Note (Hi). At the bottom right, there are four buttons: Lot-Serial, Cascade, Express, and Inspect. A blue arrow points to the Inspect button.

← The Inspect Button appears at the bottom right of the form.

# Ex. 4 – Hide Button

## Navigate to Forms Personalization

- Help
- Diagnostics
- Custom Code
- Personalize



# Ex. 4 – Hide Button

Function Name	RCV_RCVTXERT	Form Name	RCVTXERT	Debug Mode	Off
Seq	Description	Level	Enabled		
1	Inspection Button	Form	<input checked="" type="checkbox"/>		

- Complete the Header section.
  - Seq = 1
  - Description = Inspection Button
  - Level = Form
  - Enabled is checked

# Ex. 4 – Hide Button

## Complete the Condition Tab

- Trigger Event = When New Form Instance
- Context Level = Responsibility
- Context Value = Warehouse Receiving

The screenshot shows a configuration window with two tabs: 'Condition' and 'Actions'. The 'Condition' tab is active. It contains the following fields:

- Trigger Event:** A dropdown menu with 'WHEN-NEW-FORM-INSTANCE' selected. To its right is the text '(You can enter additional...)'.
- Trigger Object:** An empty text input field.
- Condition:** A large empty text area.
- Processing Mode:** A dropdown menu with 'Not in Enter-Query Mode' selected.
- Context:** A section with two sub-fields:
  - Level:** A dropdown menu with 'Responsibility' selected.
  - Value:** A text input field with 'Warehouse Receiving' entered.

# Ex. 4 – Hide Button

## Complete the Actions Tab

- Seq = 1
- Type = Property
- Object Type = Item
- Target Object = RCV\_CONTROL.INSPECTION\_BUT
- Property Name = Displayed
- Value = False (not displayed)

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

Select By Text...

Object Type: **Item**

Target Object: **RCV\_CONTROL.INSPECTION\_BUT**

Property Name: **DISPLAYED**

Value: **FALSE**

# Ex. 4 – Hide Button

Result - Button is gone

The screenshot shows a software window titled "Receiving Transactions (GLF)". It has several tabs: "Lines", "Details", "Order Information", "Outside Services", and "Currency". The "Lines" tab is active, displaying a table with columns for Quantity, UOM, and Secondary. The first row is highlighted in yellow with a quantity of 1500 and UOM of Each. The second row has a quantity of 1000 and UOM of Poun. Below the table are plus and minus buttons. To the right of the table is another table with columns for Destination Type, Item, Rev, and Description. The first row is highlighted in yellow with Destination Type "Receiving", Item "10045986", Rev "--J", and Description "VALVE, CHECK". The second row has Destination Type "Inventory", Item "12000157", Rev "--G", and Description "PVC CLEAR (1124)". Below the tables is a details panel with various fields and values:

Operating Unit		Receipt	500002
Supplier	B. Braun Medical, Inc.	Order	10009
Description	VALVE, CHECK	Parent Type	Receive
Destination	---	Inspection	Not Inspected - Inspec
Header Receiver Note		Current Location	Materials Warehc
Shipment Receiver Note	Hi	Hazard Class	

At the bottom of the window are three buttons: "Lot-Serial", "Cascade", and "Express".



# Ex. 5 – Populate Field

Supplier Lot Number is to be populated with one of three values.

- Receipt Number
- Supplier Lot Number – if a DFF flag indicates this is desired
- If Supplier Lot Number is indicated by DFF, but not provided, populate with zero

# Ex. 5 – Populate Field

Function Name	RCV_RCVTXERT	Form Name	RCVTXERT	Debug Mode	Off
Seq	Description	Level	Enabled		
1	Inspection Button	Form	<input checked="" type="checkbox"/>		
2	Lot Number Determination	Form	<input checked="" type="checkbox"/>		

We are already in the form from example 4.

- Complete the Header section.
  - Seq = 2
  - Description = Lot Number Determination
  - Level = Form
  - Enabled is checked

# Ex. 5 – Populate Field

## Complete the Condition Tab

The screenshot shows a configuration window with two tabs: 'Condition' and 'Actions'. The 'Condition' tab is active. It contains the following fields:

- Trigger Event:** A dropdown menu showing 'WHEN-NEW-BLOCK-INSTANCE'.
- Trigger Object:** A text input field containing 'LOT\_ENTRY'.
- Condition:** An empty text area.
- Processing Mode:** A dropdown menu showing 'Not in Enter-Query Mode'.
- Context:** A section with a 'Level' dropdown menu showing 'Site' and an empty 'Value' field.

- Trigger Event = When New Block Instance
- Trigger Object = LOT\_ENTRY
- Context Level = Site

# Ex. 5 – Populate Field

## Complete the Actions Tab

- Seq = 1
- Type = Property
- Object Type = Item
- Target Object = LOT\_ENTRY.LOT\_NUMBER
- Property Name = Value
- Value = a SQL statement

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

Select By Text...

Object Type: **Item**

Target Object: **LOT\_ENTRY.LOT\_NUMBER**

Property Name: **VALUE**

Value: `= Select A from (select  
CASE WHEN ATTRIBUTE11 = 'Y' THEN nvl(  
RCV_TRANSACTION.VENDOR_LOT_NUM,0)  
ELSE 0 END AS VENDOR_LOT_NUM`

Get Value

# Ex. 5 – Populate Field

The value is a SQL statement.

Reference is made to a descriptive flexfield. If its value is Y, then use the supplier lot number. Otherwise, use receipt number.

If DFF = 'Y' but there is no value in supplier lot number, use '0'.

```
= Select A from (select
CASE WHEN ATTRIBUTE11 = 'Y' THEN
    nvl(:RCV_TRANSACTION.VENDOR_LOT_NUM, '0') ELSE
    :OVERFLOW_AREA.RECEIPT_NUM
END A
from
apps.mtl_system_items
where segment1 =
:LOT_CONTEXT.ITEM
and organization_id = 168)
```

# Ex. 6 – Display Warning

To fill a gap on Ex. 5...

What if the supplier lot number is not there when needed?

Using a zero for the lot number is not desired.

The system should provide a warning.

# Ex. 6 – Display Warning

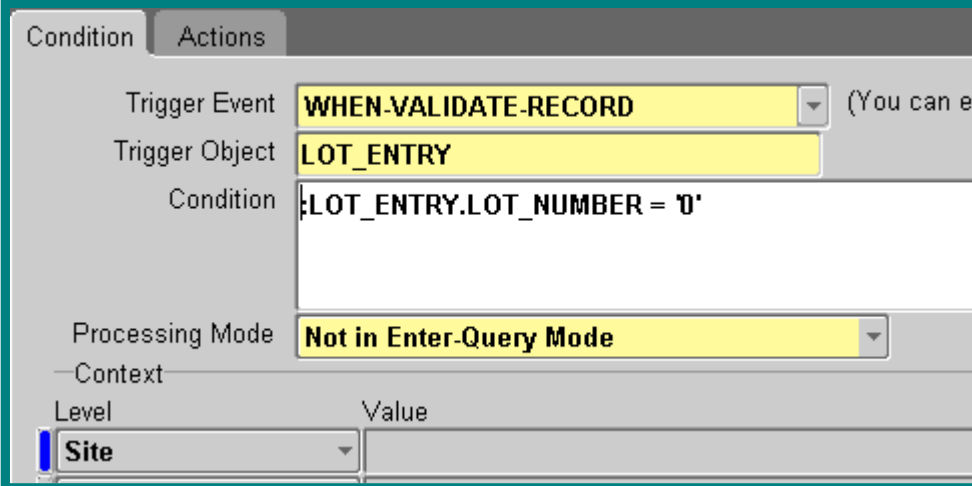
Function Name	RCV_RCVTXERT	Form Name	RCVTXERT	Debug Mode	Off
Seq	Description	Level	Enabled		
1	Inspection Button	Form	<input checked="" type="checkbox"/>		
2	Lot Number Determination	Form	<input checked="" type="checkbox"/>		
3	Warning Supplier Lot Missing	Form	<input checked="" type="checkbox"/>		

- Complete the Header section.
  - Seq = 3
  - Description = Warning Supplier Lot Missing
  - Level = Form
  - Enabled is checked

# Ex. 6 – Display Warning

## Complete the Condition Section

- Trigger Event = When Validate Record
- Trigger Object = LOT\_ENTRY
- Condition = :LOT\_ENTRY.LOT\_NUMBER = '0'
- Context Level = Site



The screenshot shows a configuration window with two tabs: "Condition" and "Actions". The "Condition" tab is active. The settings are as follows:

Trigger Event	WHEN-VALIDATE-RECORD	(You can e
Trigger Object	LOT_ENTRY	
Condition	:LOT_ENTRY.LOT_NUMBER = '0'	
Processing Mode	Not in Enter-Query Mode	
Context		
Level	Site	Value



# Ex. 6 – Display Warning

## Complete the Actions Tab

- Seq = 1
- Type = Message
- Message Type = Warn
- Message Text = The lot number selected appears to be incorrect. Click "Cancel" to go back and reenter your data.

The screenshot shows a software interface with two tabs: 'Condition' and 'Actions'. The 'Actions' tab is active and contains a table with the following columns: Seq, Type, Description, Language, and Enabled. The first row is highlighted in yellow and contains the values: Seq: 1, Type: Message, Description: (empty), Language: All, and Enabled: checked. To the right of the table, there are two fields: 'Message Type' with a dropdown menu set to 'Warn', and 'Message Text' with a text area containing the message: 'The lot number selected appears to be incorrect. Click "Cancel" to go back and reenter your data.'

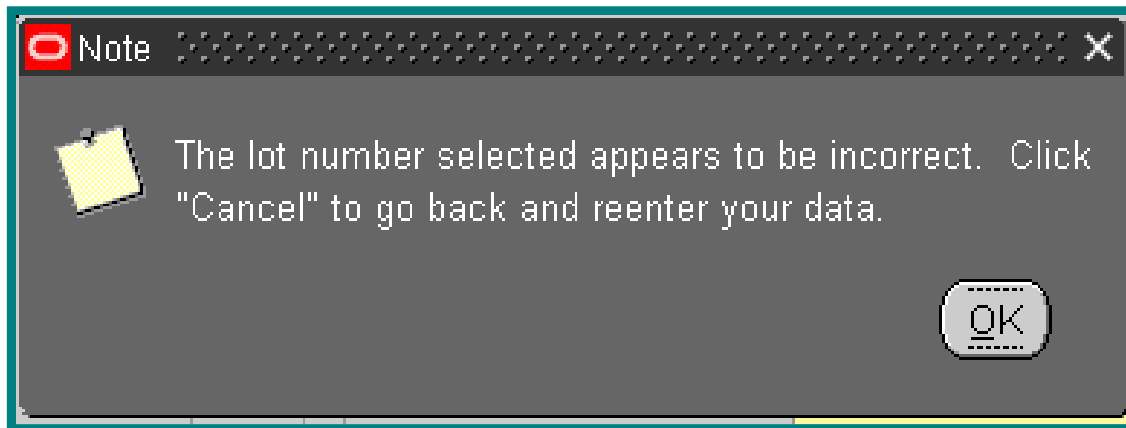
Seq	Type	Description	Language	Enabled
1	Message		All	<input checked="" type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

Message Type: Warn

Message Text: The lot number selected appears to be incorrect. Click "Cancel" to go back and reenter your data.

# Ex. 6 – Display Warning

- If a lot number of “0” is encountered, the system displays this message.



# Documentation

- How you can document Forms Personalizations
  - Manual
  - Query
- How to verify your documentation
  - Oracle's Find Personalizations Form

# Documentation

- Forms Personalizations typically do not have a large volume of data. Cut and paste into a document can be useful
- A query can be useful too.

# Documentation

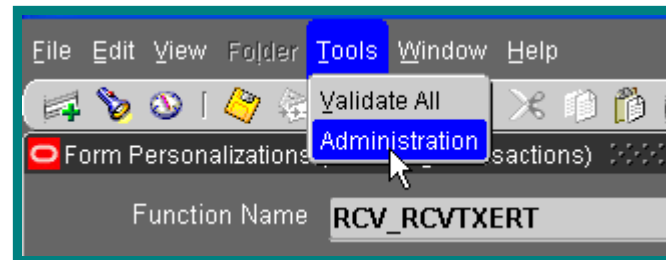
## A Query

```
SELECT fcr.id
,      fff.user_function_name
,      FCR.FORM_NAME FORM
,      FCR.SEQUENCE SEQ
,      FCR.DESCRPTION
,      case when fcr.rule_type = 'F' then 'FORM'
            when fcr.rule_type = 'A' then 'FUNCTION'
            ELSE 'UNKNOWN' END P_LEVEL
,      FCR.ENABLED
,      FU.USER_NAME
,      FCR.TRIGGER_EVENT
,      FCR.TRIGGER_OBJECT
,      FCR.LAST_UPDATE_DATE
FROM APPLSYS.FND_FORM_CUSTOM_RULES FCR
      ,APPS.FND_USER FU
      ,apps.FND_FORM_FUNCTIONS_VL FFF
where
      fcr.function_name = fff.function_name
and fcr.last_updated_by = FU.USER_ID
AND FCR.ENABLED LIKE :ENABLED
order by form_name, sequence;
```

# Documentation

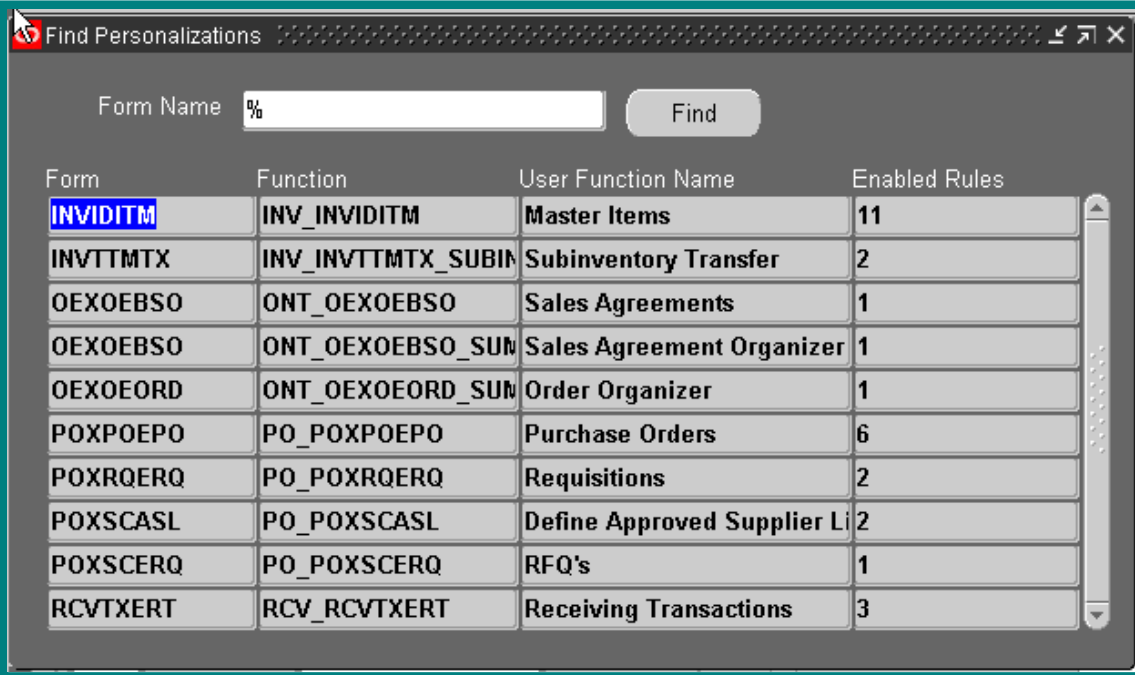
## While in a Forms Personalization

- Tools
  - Administration



# Documentation

The system lists all the forms with Forms Personalizations, with a count of each.



The screenshot shows a window titled "Find Personalizations" with a search bar for "Form Name" containing a wildcard "%". Below the search bar is a table with four columns: "Form", "Function", "User Function Name", and "Enabled Rules". The table lists various forms and their associated personalizations.

Form	Function	User Function Name	Enabled Rules
<b>INVIDITM</b>	INV_INVIDITM	Master Items	11
INVTMTX	INV_INVTMTX_SUBIN	Subinventory Transfer	2
OEXOEB SO	ONT_OEXOEB SO	Sales Agreements	1
OEXOEB SO	ONT_OEXOEB SO_SUM	Sales Agreement Organizer	1
OEXOEO RD	ONT_OEXOEO RD_SUM	Order Organizer	1
POXPOE PO	PO_POXPOE PO	Purchase Orders	6
POXRQER Q	PO_POXRQER Q	Requisitions	2
POXSCAS L	PO_POXSCAS L	Define Approved Supplier Li	2
POXSCER Q	PO_POXSCER Q	RFQ's	1
RCVTXER T	RCV_RCVTXER T	Receiving Transactions	3

# Migration to Production

There are two methods to migrate into production.

- Enter directly as shown in these slides.
- Use scripts which are available to copy from a test instance into production.



# Cautions

- Future Oracle patches could impact your Forms Personalizations. Testing is needed when you patch.
- Don't try to remove standard Oracle restrictions through Forms Personalization. If you want to skip a field that is required, try using an "auto-populate" method instead.
- It would be a good idea to restrict access to the "Utilities:Diagnostics" profile.

# Q&A

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