

Case Study 11i.10

Using the New Forms 6i
Personalization Capability to
Enforce Business Rules in
Oracle Assets



Goals of Presentation

- Overview of our Project
- Business case for “custom” logic
- Possible Approaches
- Capabilities of Forms 6i Personalization
- Step by Step Approach for our Requirements
- Other Personalizations in Scope
- Summary

Overview of Project

- Large 11i Installation – PA, AP, GL, PO installed
- Retailer
- US and Canada
- 6000 + Locations
- 1.5 MM Asset Records in 2 Legacy systems
- FA and AR being implemented post 11.5.10 Upgrade
- Heavy integration with 3rd Party EAM solution
- Rapid growth in Asset base expected – better tracking ability
- Integration with Property Tax Solution

Business Case for Custom Logic

- Large number of potential end users geographically dispersed
- Several key extensions to support business requirements
- Turnover and training challenges
- Previous systems were home grown
- Other Oracle modules had been tailored through use of 3rd party applications
- Oracle Assets provided too much flexibility – need to restrict and guide users

Business Case Con't

- During various CRP and training sessions – too many holes identified
- Flexibility of Oracle Assets often viewed as not restrictive enough
- Different rules for property vs. equipment
- Different rules for tax vs. finance
- Did not want Asset / Books Security features

Our Options

- Customization
 - Forms
 - Triggers
 - Exception or Alert Based Reports
- Use Custom Library
- 3rd Party Tool – Already licensed for other apps
- Forms 6i Personalization

Our Other Considerations

- Customization
 - Costly to Build, Test, Support
 - Future patching and upgrades more difficult
 - Customizations are extra cost if hosted
- 3rd Party Tool
 - Required additional expertise
 - Desire to limit use of bolt-on products
 - Stated direction to simplify
- Custom Library – required scarce skilled development resources

The Choice – Forms 6i Personalization

- Recent 11.5.10 Upgrade allowed opportunity to experiment and consider as a choice
- Goal of organization to avoid customizations
- Goal of organization to avoid 3rd party solutions
- Ability to have real time feedback
- Goal of organization to move into areas supported by E-Business Suite
- Our Business Analysts had successes at previous customers with these approaches
- Did not require a developer

Quick Overview of Forms 6i Personalization – Some Background

- Core Modules – Available in 11.5.10 as well as Release 12
- Located near “Examine” type utilities
- Allows for customers to create rules and decide how and when they are applied
- Not initially heavily documented – required trial and error, bartering for Oracle internal documentation

Capabilities of Personalization

- Remove fields, buttons, tabs, etc. from the screen because they never use them
- Re-label fields and buttons to be more insightful or to use a terminology of the customer
- Change an attribute of a field – update, required, etc
- Change the default value of fields
- Restrict or enable for a user or a responsibility or application – (Industry is Future Use)
- Have conditional logic for when the rule is invoked
- Have site specific dynamic messages for immediate feedback

Capabilities (Con't)

- Allows you to make declarative changes to a form.
- Changes get applied at runtime when the proper trigger event occurs.
- Changes can get applied based user, resp, etc
- You can:
 - Change object properties
 - Execute certain Forms builtins
 - Display helpful, warning or error messages
 - Activate menu entries
 - Prevent Actions

Rules-Conditions

The screenshot shows the 'Form Personalizations (Users)' window. At the top, the 'Function Name' is 'FND_FNDSCAUS' and the 'Form Name' is 'FNDSCAUS'. There is a checkbox for 'Show Debug Messages' which is unchecked. Below this is a table with columns 'Seq', 'Description', and 'Enabled'. The first row is highlighted in yellow and has a checked 'Enabled' box. Below the table are two tabs: 'Condition' and 'Actions'. The 'Condition' tab is active. It contains a 'Trigger Event' dropdown set to 'WHEN-NEW-FORM-INSTANCE', a 'Trigger Object' text box, and a 'Condition' text box. There is a checkbox for 'Fire in Enter-Query Mode' which is unchecked. Below the condition section is a 'Context' section with a table for 'Level' and 'Value'. The first row has 'Site' in the 'Level' column. At the bottom of the window are buttons for 'Add Parameter...', 'Add Block...', 'Add Item...', 'Validate', and 'Apply Now'.

Seq	Description	Enabled
		<input checked="" type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Function Name: Form Name: Show Debug Messages

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

Trigger Object:

Condition:

Fire in Enter-Query Mode

Context

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

Buttons: Add Parameter... Add Block... Add Item... Validate Apply Now

Determines when a personalization will apply
If Evaluates to True, then something will happen.

Context – Site, Resp, User

The screenshot shows the 'Form Personalizations (Users)' window. At the top, the 'Function Name' is 'FND_FNDSCAUS' and the 'Form Name' is 'FNDSCAUS'. There is a checkbox for 'Show Debug Messages' which is unchecked. Below this is a table with columns 'Seq', 'Description', and 'Enabled'. The first row is highlighted in yellow and has '1' in the 'Seq' column, a blank 'Description' field, and a checked 'Enabled' checkbox. Below the table are two tabs: 'Condition' and 'Actions'. The 'Condition' tab is active, showing 'Trigger Event' set to 'WHEN-NEW-FORM-INSTANCE' with a dropdown arrow and a note '(You can enter additional event names.)'. Below this are fields for 'Trigger Object' and 'Condition'. A checkbox 'Fire in Enter-Query Mode' is unchecked. Below the condition section is a 'Context' section with a table with columns 'Level' and 'Value'. The first row has 'Site' in the 'Level' column and a dropdown arrow in the 'Value' column. At the bottom of the window are buttons: 'Add Parameter...', 'Add Block...', 'Add Item...', 'Validate', and 'Apply Now'.

Seq	Description	Enabled
1		<input checked="" type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Function Name: Form Name: Show Debug Messages

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

Trigger Object:

Condition:

Fire in Enter-Query Mode

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

Buttons: Add Parameter... Add Block... Add Item... Validate Apply Now

* Note that Industry is reserved for Future Use

Actions

- Determine what the personalization will do
- Sequence determines Order (you can have multiple personalizations)
- Description is for debugging and for documentation purposes
- Language can apply to All or one Language
- Set Properties, Display Messages, Call Forms or Functions

Actions - Example

The screenshot displays the Oracle Applications Form Personalizations (Asset Workbench) interface. The window title is "Oracle Applications - 7-Eleven, Inc. eBusiness Suite - IMM1 (copy of ODR2 as of 6/18/06 at 11:00)". The menu bar includes "File", "Edit", "View", "Folder", "Tools", "Window", and "Help". The toolbar contains various icons for navigation and editing.

The main configuration area shows:

- Function Name: **FAXASSET**
- Form Name: **FAXASSET**
- Debug Mode: **Off**

Seq	Description	Level	Enabled
2	Enable Control to Prevent Override of Deprn Expense Segment - Quick Additions Screen	Form	<input checked="" type="checkbox"/>

Below the table, the "Actions" tab is active, showing a list of actions:

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

Message Type: **Error**

Message Text: **PERS-SEQ2- 7-Eleven Rules prohibit changing the value of the default expense account segment assigned to the category.**

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

The Windows taskbar at the bottom shows the "start" button, several application icons, a search bar, and the system clock displaying "5:28 PM".

Reminder – Our Goals

- Enforce Business Rules above and beyond standard functionality
- Remove some of the flexibility of the Applications
- Avoid Customizations of Forms
- Avoid use of 3rd Party Products
- Avoid use of Custom Library
- Use Forms 6i Personalization to accomplish all of the above

For our study- Business Rules

1.Prevent Override of Depreciation Expense Segment as Defined on the Category

2.Limit use of location combinations to those applicable to the corporate book – US, CA

3.Make Retirement Type a mandatory field for reporting and accounting purposes

4.Enforce use of uppercase when entering or querying descriptions

Prevent Override of Deprn Segment

- Categories suggest a default expense account
- User can override on the Quick Additions Form
- User can override on the Detailed Additions form
- We can end up with depreciation expense in wrong accounts

Standard Quick Additions Functionality – Default from Category

The screenshot displays the 'QuickAdditions' software interface. The main window contains several input fields for asset information:

- Asset Number: [Empty]
- Tag Number: [Empty]
- Serial Number: [Empty]
- Asset Type: **Capitalized** (dropdown menu)
- Supplier Name: **TESTAMERICA INC**
- Invoice Number: [Empty]

Below these fields, there are sections for 'Book' and 'Assignment'. The 'Assignment' section includes a table with columns for 'Units' and 'Employee Name':

Units	Employee Name
1	[Empty]
[Empty]	[Empty]
[Empty]	[Empty]
[Empty]	[Empty]

An 'SLC Accounting Flexfield' dialog box is overlaid on the main window. It contains the following fields:

- Balancing Segment: [Empty]
- Location: [Empty]
- Account: **06150** (I/C DEPR-PMS GENERAL)
- Sub-Account: **0000**
- TBD1: **00000000**
- TBD2: **00000000** (DEFAULT VALUE)

At the bottom of the dialog box, there are 'OK' and 'Cancel' buttons.

Quick Additions – Allows Override

SLC Accounting Flexfield

Balancing Segment	<input type="text" value="0000000005"/>	7-ELEVEN, INC.
Location	<input type="text" value="0010102"/>	7-11 STR 1628 S. ATLANTIC AVE
Account	<input type="text" value="06153"/>	I/C DEPR-PMS EXCESS PROPERTY
Sub-Account	<input type="text" value="0000"/> ...	
TBD1	<input type="text" value="00000000"/>	
TBD2	<input type="text" value="00000000"/>	DEFAULT VALUE

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Case One - Background Research

- Quick Additions and Detailed Additions Form are all part of the Asset Workbench – Form Name is FAXASSET – (From Help About Oracle Applications)
- Use Examine Utility to Determine Block Names – QuickAdditions – ADDITION_DIST and Detailed Additions is the ASSIGNMENTS_DIST Block
- A Default Expense Account is associated with Each Category/Book Combination as part of the standard setup

Case One – Background (cont)

- Other Key Elements Needed—
 - :ASSIGNMENTS_HEADER.DEPRN_EXPENSE_ACCT
 - :ASSIGNMENTS_HEADER.BOOK_TYPE_CODE
 - :ASSIGNMENTS_HEADER.ASSET_CATEGORY_ID
- FA_CATEGORY_BOOKS.deprn_expense_a
cct and book_type_code in the base table

How Did we Determine this Information?

- Use of basic tools available to support or business analysts
- Help -About this Record
- Examine Utility
- Past Experience
- E-TRM on Metalink

How to Determine a Form Name



```

About Oracle Applications
-----
NLS_LANG : AMERICAN_AMERICA.US7ASCII
NLS_NUMERIC_CHARACTERS : .,
ORACLE_HOME : /d801/oracle/imm1 ora/8.0.6
ORACLE_PATH : [Unset]
ORA_NLS_CHARSET_CONVERSION : [Unset]
TNS_ADMIN : /d801/oracle/imm1 ora/8.0.6/network/admin/imm1_pls1c051
TWO_TASK : imm1

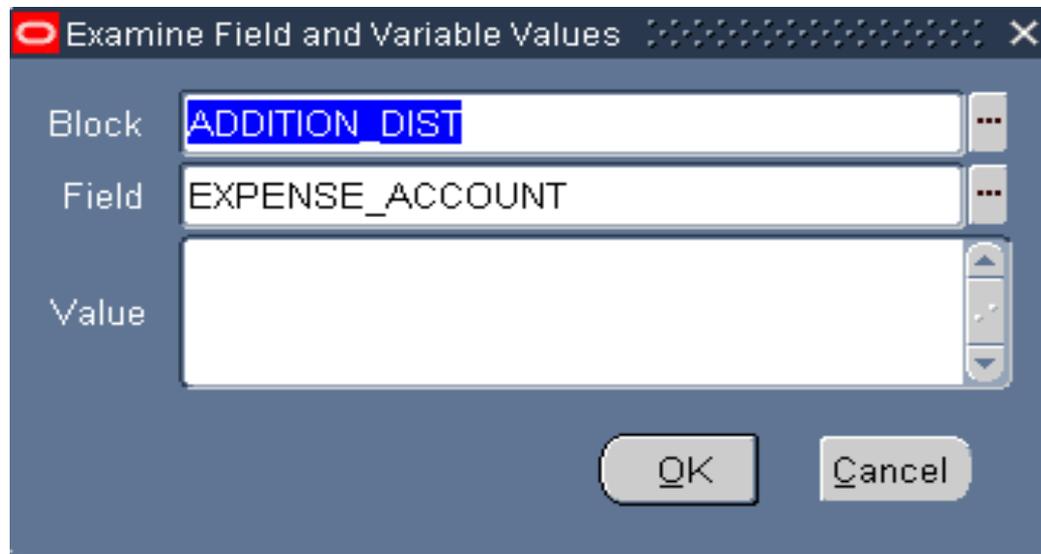
-----
Current Form
-----
Form Application : Assets
Form Name : FAXASSET
Form Path : /d801/oracle/imm1 appl/fa/11.5.0/forms/US/FAXASSET.fmx
Form Version : 11.5.433
Form Last Modified : $Date: 2006/01/30 07:48 $

-----
Forms
-----
OK

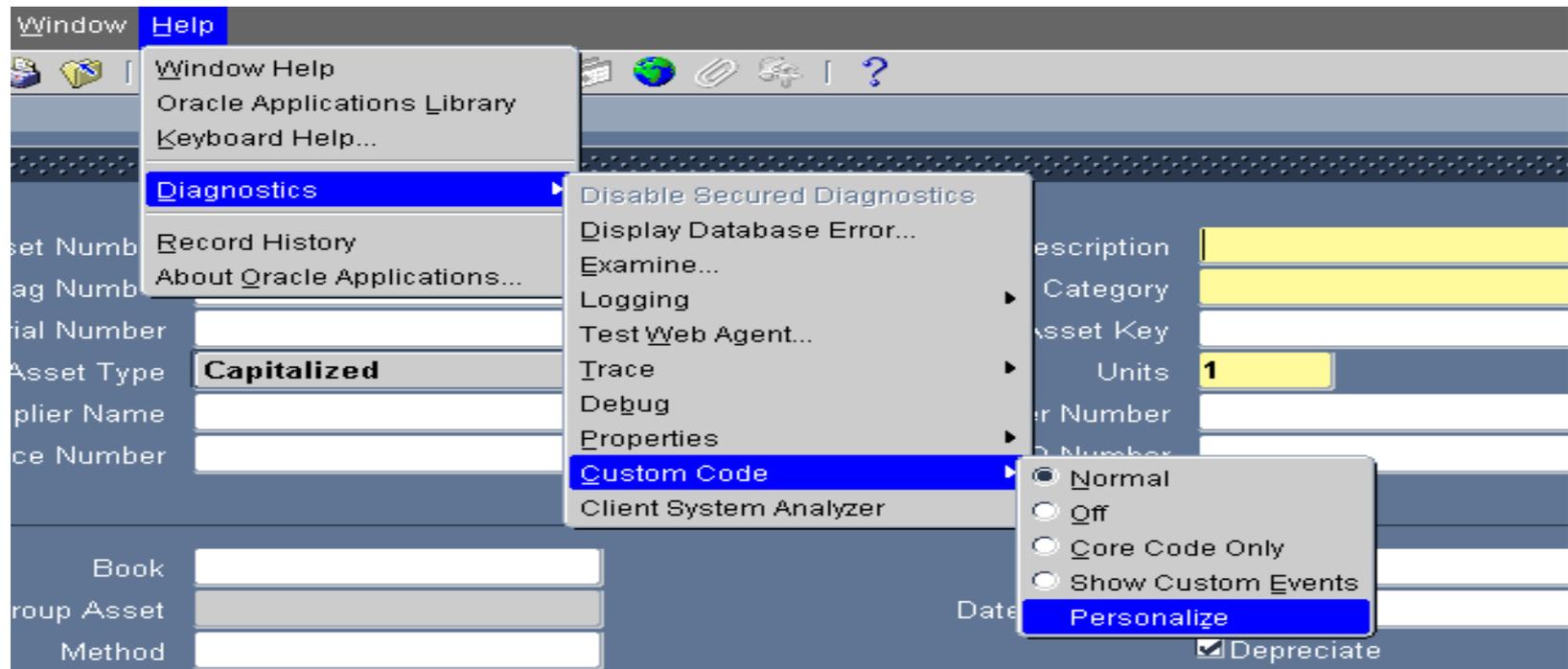
```

Examine Utility

- Help – Diagnostics – Examine
- Controlled by (Utilities:Diagnostics) Profile



How to Invoke Form to Define Personalizations



Invoke the Form to Setup the Personalization from the Form you wish to modify

Other Menu Items

- Core Code Only – if you are having issues
- Show Custom Events – Great for finding events to attach to
- Personalize – Invokes the Personalization form
- Normal – Run form with Personalizations

Need to do Several Things

- Name the Rule and supply a Condition
- Attached to some “Event” – pre-existing logic in the form
- Supply a Context – (who does this apply to?)
- Create an Action(s) - What should result ?

Rule – Prevent Override - QuickAdds

The screenshot displays the Oracle Applications Form Personalizations window for the FAXASSET form. The window title is "Oracle Applications - 7-Eleven, Inc. eBusiness Suite - IMM1 (copy of ODR2 as of 6/18/06 at 11:00)". The menu bar includes File, Edit, View, Folder, Tools, Window, and Help. The toolbar contains various icons for editing and saving. The main area shows the following configuration:

- Function Name: FAXASSET
- Form Name: FAXASSET
- Debug Mode: Off

Seq	Description	Level	Enabled
2	Enable Control to Prevent Override of Deprn Expense Segment - Quick Additions Screen	Form	<input checked="" type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

Condition Actions

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

Trigger Object: ADDITION_DIST

Condition: `:ADDITION_BOOKS.EXPENSE_ACCT != (select deprn_expense_acct from fa_category_books where fa_category_books.book_type_code = :ADDITION_BOOKS.BOOK_TYPE_CODE`

Processing Mode: Not in Enter-Query Mode

Context

Level	Value
Site	

Buttons: Insert 'Get' Expression..., Insert Item Value..., Validate, Apply Now

Windows taskbar at the bottom shows the start button, several open applications, and the system clock at 5:27 PM.

Trigger Event – When Validate Record

The screenshot displays the Oracle Applications Form Personalizations window for the FAXASSET form. The window title is "Oracle Applications - 7-Eleven, Inc. eBusiness Suite - IMM1 (copy of ODR2 as of 6/18/06 at 11:00)". The menu bar includes File, Edit, View, Folder, Tools, Window, and Help. The toolbar contains various icons for navigation and editing. The main area shows the following configuration:

- Function Name: FAXASSET
- Form Name: FAXASSET
- Debug Mode: Off

Seq	Description	Level	Enabled
2	Enable Control to Prevent Override of Deprn Expense Segment - Quick Additions Screen	Form	<input checked="" type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

Condition Actions

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

Trigger Object: ADDITION_DIST

Condition:
`:ADDITION_BOOKS.EXPENSE_ACCT !=
(select deprn_expense_acct from fa_category_books
where fa_category_books.book_type_code = :ADDITION_BOOKS.BOOK_TYPE_CODE`

Processing Mode: Not in Enter-Query Mode

Context

Level	Value
Site	

Buttons: Insert 'Get' Expression..., Insert Item Value..., Validate, Apply Now

Windows taskbar at the bottom shows the start button, several open applications (Y..., S..., I..., 4 F, W..., M..., P..., Z P), a search bar, and the system tray with the time 5:27 PM.

Condition – (SQL Statement)

The screenshot displays the Oracle Applications Form Personalizations window for the FAXASSET form. The window title is "Oracle Applications - 7-Eleven, Inc. eBusiness Suite - IMM1 (copy of ODR2 as of 6/18/06 at 11:00)". The menu bar includes File, Edit, View, Folder, Tools, Window, and Help. The toolbar contains various icons for editing and saving. The main area shows the following configuration:

- Function Name: FAXASSET
- Form Name: FAXASSET
- Debug Mode: Off

Seq	Description	Level	Enabled
2	Enable Control to Prevent Override of Deprn Expense Segment - Quick Additions Screen	Form	<input checked="" type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

Condition configuration details:

- Trigger Event: WHEN-VALIDATE-RECORD (You can enter additional event names.)
- Trigger Object: ADDITION_DIST
- Condition: `:ADDITION_BOOKS.EXPENSE_ACCT != (select deprn_expense_acct from fa_category_books where fa_category_books.book_type_code = :ADDITION_BOOKS.BOOK_TYPE_CODE`
- Processing Mode: Not in Enter-Query Mode

Context configuration:

Level	Value
Site	

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

Windows taskbar at the bottom shows the start button, several open applications, and the system clock at 5:27 PM.

SQL- If Field Segment Differs from Setup Definition

```
:ADDITION_BOOKS.EXPENSE_ACCT !=  
(select deprn_expense_acct from  
  fa_category_books  
where fa_category_books.book_type_code =  
  :ADDITION_BOOKS.BOOK_TYPE_CODE  
and fa_category_books.category_id =  
  :ADDITION_ADD.ASSET_CATEGORY_ID)
```

Use Validate Button

Condition Actions

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

Trigger Object **ADDITION_DIST**

Condition **:ADDITION_BOOKS.EXPENSE_ACCT !=
(select deprn_expense_acct from fa_category_books
where fa_category_books.book_type_code = :ADDITION_BOOKS.BOOK_TYPE_CODE**

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

Context

Level	Value
Site	

Insert 'Get' Expression... Insert Item Value... **Validate**

Use Validate Button

The screenshot shows a configuration window with two tabs: 'Condition' and 'Actions'. The 'Condition' tab is selected. The configuration includes:

- Trigger Event: **WHEN-VALIDATE-RECORD** (You can enter additional event names.)
- Trigger Object: **ADDITION_DIST**
- Condition: `:ADDITION_BOOKS.EXPENSE_ACCT (select deprn_expense_acct from fa where fa_category_books.book_type`
- Processing Mode: **Not in Enter-Query Mode**

Below the configuration is a 'Context' section with a table:

Level	Value
Site	

At the bottom of the window are three buttons: 'Insert 'Get' Expression...', 'Insert Item Value...', and 'Validate'. A 'Note' dialog box is overlaid on the 'Validate' button, containing the text 'The Condition evaluates to false.' and an 'OK' button.

Action – Raise Error and Display Message

The screenshot displays the Oracle Applications Form Personalizations (Asset Workbench) interface. The window title is "Oracle Applications - 7-Eleven, Inc. eBusiness Suite - IMM1 (copy of ODR2 as of 6/18/06 at 11:00)". The interface includes a menu bar (File, Edit, View, Folder, Tools, Window, Help) and a toolbar with various icons. The main area is titled "Form Personalizations (Asset Workbench)" and shows the following configuration:

- Function Name: FAXASSET
- Form Name: FAXASSET
- Debug Mode: Off

Seq	Description	Level	Enabled
2	Enable Control to Prevent Override of Deprn Expense Segment - Quick Additions Screen	Form	<input checked="" type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

Below the table, there are tabs for "Condition" and "Actions". The "Actions" tab is active, showing a table of actions:

Seq	Type	Description	Language	Enabled
1	Message	Error 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"/>

To the right of the actions table, there are fields for "Message Type" (set to "Error") and "Message Text" (containing the text: "PERS-SEQ2-7-Eleven Rules prohibit changing the value of the default expense account segment assigned to the category."):

Message Type: Error

Message Text: PERS-SEQ2-7-Eleven Rules prohibit changing the value of the default expense account segment assigned to the category.

At the bottom of the interface, there are buttons for "Insert 'Get' Expression...", "Insert Item Value...", "Validate", and "Apply Now". The Windows taskbar at the bottom shows the Start button, several open applications, and the system tray with the time 5:28 PM.

Save your Work and Try it Out

- Navigate all the way out of the form
- Ensure Personalization Turned On
- Turn it off if you get fatal Errors
- Test it out while on queried records

Test our Work

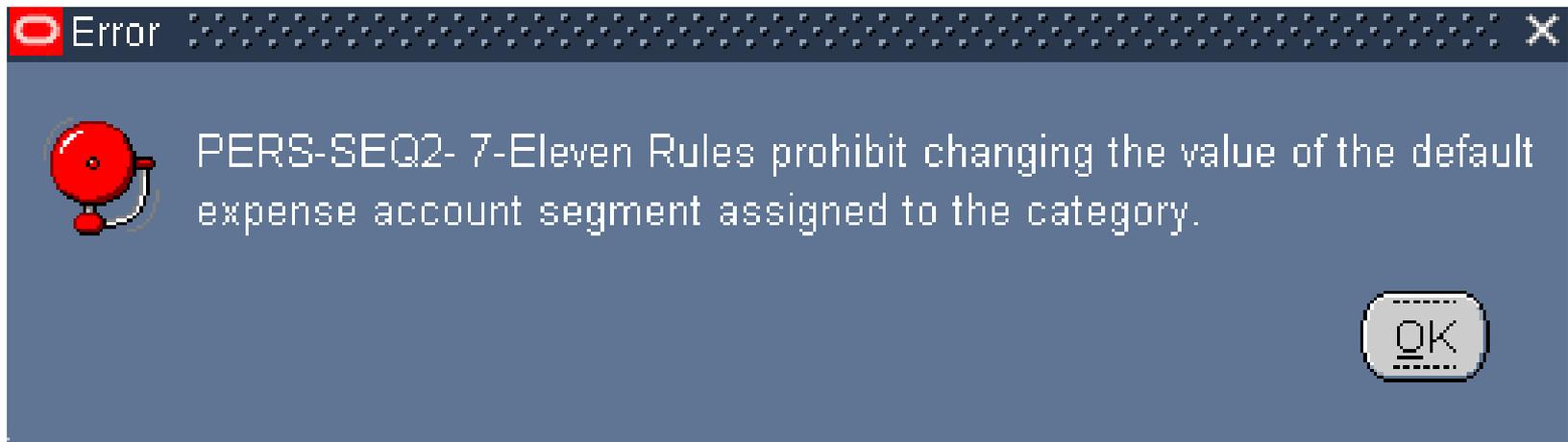
SLC Accounting Flexfield

Balancing Segment	<input type="text" value="0000000005"/>	7-ELEVEN, INC.
Location	<input type="text" value="0010102"/>	7-11 STR 1628 S. ATLANTIC AVE
Account	<input type="text" value="06153"/>	I/C DEPR-PMS EXCESS PROPERTY
Sub-Account	<input type="text" value="0000"/> ...	
TBD1	<input type="text" value="00000000"/>	
TBD2	<input type="text" value="00000000"/>	DEFAULT VALUE

◀ ▶

Exception Raised – Rule Enforced

When attempting to save the Record – When Validate Record Event will Fire – Error Message Displayed As Below



Change Back to Default -

QuickAdditions

Asset Number

Tag Number

Serial Number

Asset Type **Capitalized** ▼

Supplier Name **TESTAMERICA INC**

Invoice Number

Book

Assignment

Units	Employee Name
1	

SLC Accounting Flexfield

Balancing Segment

Location

Account **06150** I/C DEPR-PMS GENERAL

Sub-Account **0000**

TBD1 **00000000**

TBD2 **00000000** DEFAULT VALUE

OK Cancel

Positive Results!

Note

APP-OFA-48266: Transaction saved for asset number 1000002. Reference numbers: 4, 5

OK

10,000.00

Number	Expense Account	Location
	0000000005.0010102.06150.0000.000000	0010102.US.FL.VOLUSIA.DAYTONA BI

Case Two

- We have two Sets of Corporate Books for Canada and the US
- We need to keep assets in locations associated with proper country
- We have thousands of Locations – in both countries – Need to prevent transfer to locations that are not in the country associated with the book

Research

- Location Combination (Key Flex) had Country Embedded as one of the Segments
- Needed to Enforce from QuickAdditions and Additions Form
- Also Performed edits on Mass Transfers form, but not illustrated in our presentation
- Want to make sure US in our Location Segment if in US Book, CA if in Canadian Book

SQL Logic – Compare Book to Location Segment 2 (Country)

```
:ASSIGNMENTS_HEADER.BOOK_TYPE_CODE !=  
(select decode(a.segment2,'CA','SLC CANADA','US','SLC US  
CORP')  
from fa_locations a  
where  
:ASSIGNMENTS_DIST.LOCATION_ID = a.location_id)
```

It will Fail if the Country does not match the Book Name coded above

Rule and Condition

The screenshot displays the Oracle Applications Form Personalizations (Asset Workbench) interface. The window title is "Oracle Applications - 7-Eleven, Inc. eBusiness Suite - IMD1-plslc052 (source: OFD2 03/18/2006)". The menu bar includes "File", "Edit", "View", "Folder", "Tools", "Window", and "Help". The toolbar contains various icons for file operations and help.

The main area shows the "Form Personalizations (Asset Workbench)" window with the following details:

- Function Name: FAXASSET
- Form Name: FAXASSET
- Debug Mode: Off

Seq	Description	Level	Enabled
1	Enable Control to Prevent Override of Deprn Expense Segment - Transfers Screen	Form	<input checked="" type="checkbox"/>
2	Enable Control to Prevent Override of Deprn Expense Segment - Quick Additions	Form	<input checked="" type="checkbox"/>
3	Check to Make sure we are using US or Canadian Stores in the Proper Book - Transfers Screen	Form	<input checked="" type="checkbox"/>

The "Condition" tab is selected, showing the following configuration:

- Trigger Event: WHEN_VALIDATE_RECORD (You can enter additional event names.)
- Trigger Object: ASSIGNMENTS_DIST
- Condition: `:ASSIGNMENTS_HEADER.BOOK_TYPE_CODE != (select decode(a.segment2,'CA','SLC CANADA','US','SLC US CORP') from fa_locations a where :ASSIGNMENTS_DIST.LOCATION_ID = a.location_id)`
- Processing Mode: Not in Enter-Query Mode

The "Context" section shows a table with columns "Level" and "Value":

Level	Value
Site	

Buttons at the bottom include "Insert 'Get' Expression...", "Insert Item Value...", "Validate", and "Apply Now". The Windows taskbar at the bottom shows the Start button, several open applications (Calendar, Please complet..., 1 Reminder, 3 Internet E..., 3 Microsoft E..., Enforce Busine..., Removable Dis...), and the system clock showing 4:33 PM.

Action – Error and Fail

The screenshot displays the Oracle Applications Form Personalizations (Asset Workbench) interface. The window title is "Oracle Applications - 7-Eleven, Inc. eBusiness Suite - IMM1 (copy of ODR2 as of 6/18/06 at 11:00)". The menu bar includes File, Edit, View, Folder, Tools, Window, and Help. The toolbar contains various icons for navigation and editing. The main area shows the "Form Personalizations (Asset Workbench)" window with the following details:

- Function Name: FAXASSET
- Form Name: FAXASSET
- Debug Mode: Off

Seq	Description	Level	Enabled
1	Enable Control to Prevent Override of Deprn Expense Segment - Transfers Screen	Form	<input checked="" type="checkbox"/>
2	Enable Control to Prevent Override of Deprn Expense Segment - Quick Additions Screen	Form	<input checked="" type="checkbox"/>
3	Check to make sure that we are using US or Canadian Stores in the Proper Book - Transfers Screen	Form	<input checked="" type="checkbox"/>
4	Check to make sure we are using US or Canadian Stores in the Proper Book - Quick Additions	Form	<input checked="" type="checkbox"/>

Below the list, the "Condition" and "Actions" tabs are visible. The "Actions" tab is active, showing a table of actions:

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

Message Type: Error
Message Text: PERS-SEQ3 - 7 Eleven Business Rules Prohibit Assigning Assets to Stores (Locations) that do not belong to this book.

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

Taskbar at the bottom shows: start, Yahoo!, DUNS Nu..., Inbox..., Enforce..., Firefox, Personal..., Type to search, 10:41 AM.

Results – Locations Controlled

Oracle Applications - 7-Eleven, Inc. eBusiness Suite - IMM1 (copy of ODR2 as of 6/18/06 at 11:00)

File Edit View Folder Tools Window Help ORACLE

Assets

QuickAdditions

Asset Number

Tag Number

Serial Number

Asset Type **Capitalized**

Supplier Name

Invoice Number

Description **TEST**

Category **EXT.BOTTLE SHED.OWN**

Asset Key

Units **1**

Supplier Number

PO Number

Book

1,000.00

30-JUN-2006

Depreciate

FOLMNTH

01-JUL-2006

Assignment

Units	Employee Name	Number	Expense Account	Location
1			0000000030.0010012.06150.0000.000000	0010017.US.FL.ORANGE.WINTER PAR

Done Cancel

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

start Yahoo... In... Inbox... Micro... 4 Fir... 2 Wi... Micro... Type to search 2:42 PM

Error

 PERS-SEQ4 - 7-Eleven Business Rules Prevent Assigning Assets to Locations (Stores) that do not belong to this Book.

OK

Case Three

- Make Retirement Type Mandatory
- Drives Reporting and Accounting for all disposals
- Out of the Box – Retirement Type is Optional, and it is easy to forget to supply this value
 - Retirements Screen
 - Mass Retirements Screen

Research

- Retirements performed from Same Asset Workbench in previous Example FAXASSET
- Mass Retirements - FAXMAMRT
- Retirements LOV
- Retirement Type Field on Mass Retirements
 - MASS_RETIREMENTS.RETIREMENT_TYPE_DISP

Mass Retirement Form

Oracle Applications - 7-Eleven, Inc. eBusiness Suite - IMD1-plslc052 (source: OFD2 03/18/2006)

File Edit View Folder Tools Window Help

ORACLE

Mass Retirements

Book

Status **New**

Retirement Type

Units

Retire Subcomponents

Comments

Mass Transaction Number

Retire Date

Proceeds of Sale

Cost of Removal

Project Number

Task Number []

Retirement Criteria Additional Criteria

Asset Type **Capitalized**

Expense Accounts

Location

Employee Name

Category

Cost Range

Asset Numbers

Dates in Service

Fully Reserved Yes No

-

Number

Asset Key

-

-

-

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

Retirements – Asset Workbench

Oracle Applications - 7-Eleven, Inc. eBusiness Suite - IMM1 (copy of ODR2 as of 6/18/06 at 11:00)

File Edit View Folder Tools Window Help

ORACLE

Assets

Retirements

Asset Number	1000002	Reference Number	
Book		Retire Date	
Comments		Status	Pending

Retirement Details

Current Units		Current Cost	
Units Retired		Cost Retired	
Retirement Type		Proceeds of Sale	0
		Cost of Removal	0
Retirement Convention		Gain/Loss Amount	
Straight Line Method		Life Years	Months
Check/Invoice		Sold To	
Trade in Asset		Description	

Group Asset

Group Asset		Recognize Gain and Loss	
Reduction Rate	%	Prior Year Reserve Retired	
Reserve Retired			

Subcomponents Reinststate Done Cancel

start Y... S... I... 41 W... M... P... 21 Type to search 5:45 PM

Step One – Rule and Condition (Always)

The screenshot displays the Oracle Applications interface for configuring a rule. The window title is "Oracle Applications - 7-Eleven, Inc. eBusiness Suite - IMM1 (copy of ODR2 as of 6/18/06 at 11:00)". The menu bar includes "File", "Edit", "View", "Folder", "Tools", "Window", and "Help". The toolbar contains various icons for file operations and help.

The main window is titled "Form Personalizations (Mass Retirements)". It features a header with the following fields:

- Function Name: **FAXMAMRT**
- Form Name: **FAXMAMRT**
- Debug Mode: **Off**

Below the header is a table with the following columns: Seq, Description, Level, and Enabled.

Seq	Description	Level	Enabled
1	Make Retirement Type Mandatory	Form	<input checked="" type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

Below the table are two tabs: "Condition" and "Actions". The "Condition" tab is active, showing the following configuration:

- Trigger Event: **WHEN-NEW-FORM-INSTANCE** (You can enter additional event names.)
- Trigger Object: [Empty field]
- Condition: [Empty text area]
- Processing Mode: **Not in Enter-Query Mode**
- Context: [Empty field]
- Level: **Site**
- Value: [Empty field]

At the bottom of the configuration area are four buttons: "Insert 'Get' Expression...", "Insert Item Value...", "Validate", and "Apply Now".

The Windows taskbar at the bottom shows the "start" button, several application icons, a search bar, and the system clock displaying "5:52 PM".

Action – Set Property of Field

The screenshot displays the Oracle Applications Form Personalizations (Mass Retirements) interface. The main window title is "Oracle Applications - 7-Eleven, Inc. eBusiness Suite - IMM1 (copy of ODR2 as of 6/18/06 at 11:00)". The interface includes a menu bar (File, Edit, View, Folder, Tools, Window, Help) and a toolbar. The main area shows the configuration for the "FAXMAMRT" form, with "Debug Mode" set to "Off".

The "Objects" table lists the following items:

Seq	Description	Level	Enabled
1	Make Retirement Type Mandatory	Form	<input checked="" type="checkbox"/>

A search dialog box is open, displaying a list of objects with their names and prompts:

Name	Prompt
MASS_RETIREMENTS.BOOK_TYPE_CODE	Book (Mass Retirements)
MASS_RETIREMENTS.MASS_RETIREMENT_ID	Mass Transaction Number (Mass Retireme
MASS_RETIREMENTS.STATUS_DSP	Status (Mass Retirements)
MASS_RETIREMENTS.RETIREMENT_DATE	Retire Date (Mass Retirements)
MASS_RETIREMENTS.RETIREMENT_TYPE_DSP	Retirement Type (Mass Retirements)
MASS_RETIREMENTS.PROCEEDS_OF_SALE	Proceeds of Sale (Mass Retirements)
MASS_RETIREMENTS.UNITS_TO_RETIRE	Units (Mass Retirements)
MASS_RETIREMENTS.COST_OF_REMOVAL	Cost of Removal (Mass Retirements)
MASS_RETIREMENTS.RETIRE_SUBCOMPONENT...	Retire Subcomponents (Mass Retirements)
MASS_RETIREMENTS.INCLUDE_FULLY_RSVD_F...	
MASS_RETIREMENTS.PROJECT_NUMBER	Project Number (Mass Retirements)
MASS_RETIREMENTS.DESCRPTION	Comments (Mass Retirements)

The search dialog has buttons for "Find", "OK", and "Cancel". The main configuration area includes a "Select By Text..." button, a dropdown menu for "Item" (currently showing "Item"), a text field for "PROMPT_TEXT", and a "Get Value" button. At the bottom, there are buttons for "Insert 'Get' Expression...", "Insert Item Value...", "Validate", and "Apply Now". The status bar at the bottom shows "Choices in list: 162" and the Windows taskbar with the time "5:55 PM".

Set Property – LOV on Object

The screenshot displays the Oracle Applications Form Personalizations window for the form FAXMAMRT. The window title is "Oracle Applications - 7-Eleven, Inc. eBusiness Suite - IMM1 (copy of ODR2 as of 6/18/06 at 11:00)". The menu bar includes File, Edit, View, Folder, Tools, Window, and Help. The toolbar contains various icons for navigation and editing. The main area shows the "Form Personalizations (Mass Retirements)" window with the following details:

- Function Name: FAXMAMRT
- Form Name: FAXMAMRT
- Debug Mode: Off

A table lists the objects being personalized:

Seq	Description	Level	Enabled
1	Make Retirement Type Mandatory	Form	<input checked="" type="checkbox"/>

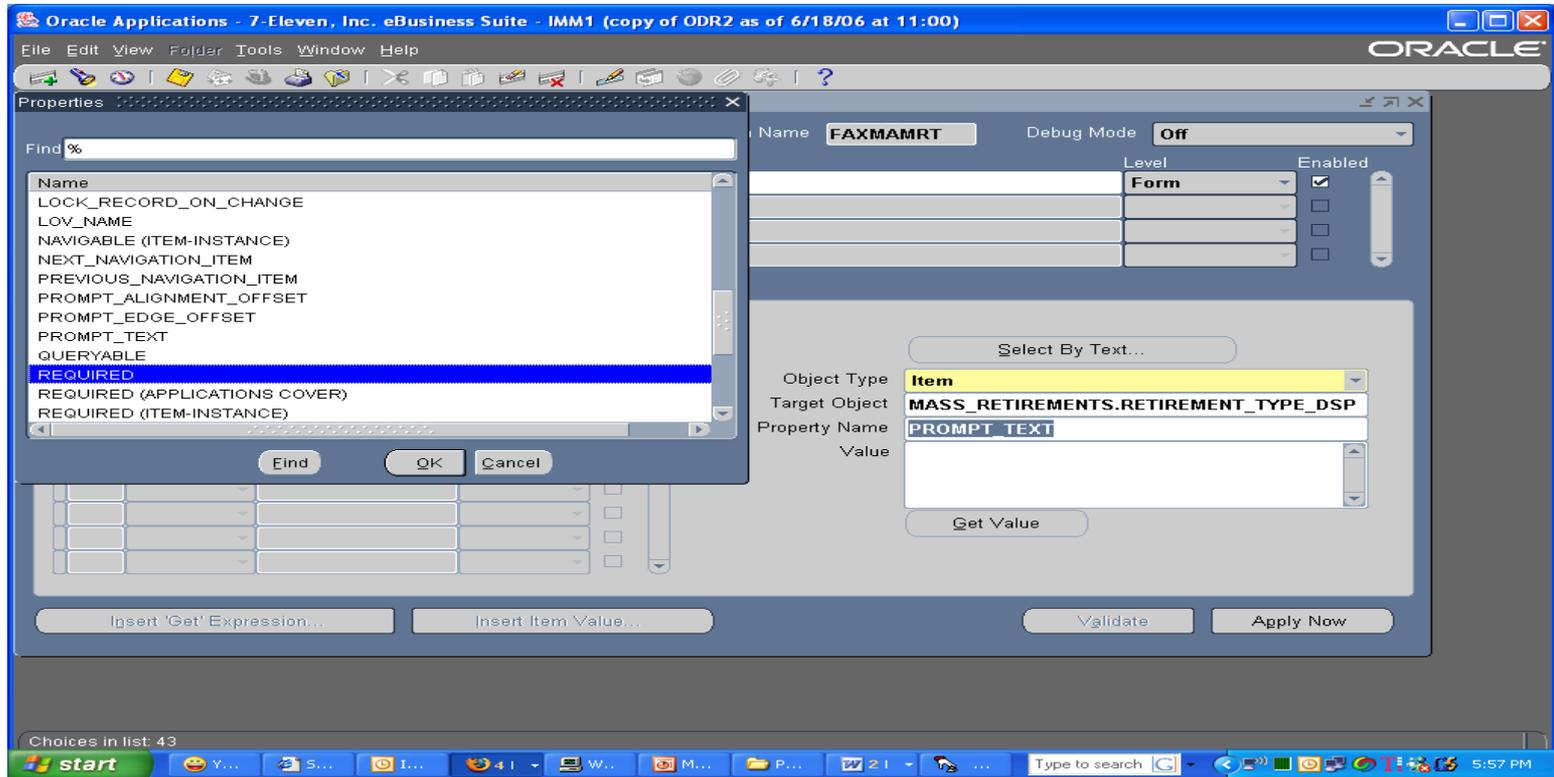
An "Objects" dialog box is open, showing a list of objects with their prompts. The object "MASS_RETIREMENTS.RETIREMENT_TYPE_DSP" is selected, with the prompt "Retirement Type (Mass Retirements)".

The dialog box also includes a "Find %" field and buttons for "Find", "OK", and "Cancel".

The main window also features a "Select By Text..." button, a dropdown menu for "Item", a text field for "PROMPT_TEXT", and a "Get Value" button. At the bottom, there are buttons for "Insert 'Get' Expression...", "Insert Item Value...", "Validate", and "Apply Now".

The status bar at the bottom indicates "Choices in list: 162" and shows the Windows taskbar with the start button, system tray, and the time 5:56 PM.

Set Property – LOV on Property Name



Property – Required = True

The screenshot displays the Oracle Applications Form Personalizations (Mass Retirements) window. The window title is "Oracle Applications - 7-Eleven, Inc. eBusiness Suite - IMM1 (copy of ODR2 as of 6/18/06 at 11:00)". The menu bar includes File, Edit, View, Folder, Tools, Window, and Help. The toolbar contains various icons for file operations and help. The main window is titled "Form Personalizations (Mass Retirements)".

At the top, the "Function Name" is "FAXMAMRT", the "Form Name" is "FAXMAMRT", and the "Debug Mode" is "Off". Below this is a table with columns "Seq", "Description", "Level", and "Enabled". The first row has "1" in the "Seq" column, "Make Retirement Type Mandatory" in the "Description" column, "Form" in the "Level" column, and a checked box in the "Enabled" column.

Below the table are two tabs: "Condition" and "Actions". The "Actions" tab is active, showing a table with columns "Seq", "Type", "Description", "Language", and "Enabled". The first row has "1" in the "Seq" column, "Property" in the "Type" column, "Retirement Type Ma" in the "Description" column, "All" in the "Language" column, and a checked box in the "Enabled" column.

To the right of the table is a configuration area with a "Select By Text..." button. Below it are labels for "Object Type", "Target Object", "Property Name", and "Value". The "Object Type" is "Item", the "Target Object" is "MASS_RETIREMENTS.RETIREMENT_TYPE_DSP", the "Property Name" is "REQUIRED", and the "Value" is "TRUE". There is also a "FALSE" option in the value dropdown. A "Get Value" button is located below the value dropdown.

At the bottom of the window are buttons for "Insert 'Get' Expression...", "Insert Item Value...", "Validate", and "Apply Now".

The Windows taskbar at the bottom shows the start button, several open applications (Y..., S..., J..., 41, W..., M..., P..., 21), a search bar, and the system tray with the time "5:58 PM".

Results – Yellow Field Indicates Mandatory

Oracle Applications - 7-Eleven, Inc. eBusiness Suite - IMM1 (copy of ODR2 as of 6/18/06 at 11:00)

File Edit View Folder Tools Window Help

ORACLE

Mass Retirements

Book

Status **New**

Retirement Type

Units

Retire Subcomponents

Comments

Mass Transaction Number

Retire Date

Proceeds of Sale

Cost of Removal

Project Number

Task Number []

Retirement Criteria Additional Criteria

Asset Type **Capitalized**

Expense Accounts

Location

Employee Name

Category

Cost Range

Asset Numbers

Dates in Service

Fully Reserved Yes No

-

Number

Asset Key

-

-

-

start Y... S... J... 4 | W... M... P... 2 | Type to search 5:59 PM

REMINDER-

Be sure to leave and return to form while debugging to ensure your results are as expected!

Case Four

- Want to ensure Asset Description is Always Uppercase
- Ease of Inquiry
- Ease of Reporting
- Corporate Standard
- Quick Additions, Detailed Additions,

Research

- Quick Additions
- Additions
- Search
- All are FAXASSET form (Workbench)

Create Rule and Condition

The screenshot displays the Oracle Applications Form Personalizations (Asset Workbench) interface. The window title is "Oracle Applications - 7-Eleven, Inc. eBusiness Suite - IMD1-plsic052 (source: OFD2 03/18/2006)". The menu bar includes File, Edit, View, Folder, Tools, Window, and Help. The toolbar contains various icons for file operations and help. The main area shows a list of form personalizations for the form named "FAXASSET".

Seq	Description	Level	Enabled
5	Do Not Allow Changes to Write Down Records on Books Screen	Function	<input checked="" type="checkbox"/>
6	Retirement Type is Mandatory	Function	<input checked="" type="checkbox"/>
7	Quick Addition Description Field All Uppercase	Function	<input checked="" type="checkbox"/>
8	Detail Addition Description Field All Uppercase	Function	<input checked="" type="checkbox"/>

Below the list, the configuration panel for the selected rule (Seq 7) is shown. It includes the following fields:

- Function Name: FAXASSET
- Form Name: FAXASSET
- Debug Mode: Off
- Trigger Event: WHEN-NEW-FORM-INSTANCE (You can enter additional event names.)
- Trigger Object: (Empty)
- Condition: (Empty)
- Processing Mode: Both
- Context: A table with columns Level and Value.

Level	Value
Site	

At the bottom of the configuration panel, there are buttons for "Insert 'Get' Expression...", "Insert Item Value...", "Validate", and "Apply Now". The status bar at the bottom shows "Record: 7/7" and "<OSB>".

Create Action – CASE_RESTRICTION - Uppercase

The screenshot displays the Oracle Applications Form Personalizations (Asset Workbench) interface. The window title is "Oracle Applications - 7-Eleven, Inc. eBusiness Suite - IMD1-plslc052 (source: OFD2 03/18/2006)". The menu bar includes File, Edit, View, Folder, Tools, Window, and Help. The toolbar contains various icons for navigation and editing. The main area shows the configuration for the form "FAXASSET".

Form Personalizations (Asset Workbench)

Function Name: **FAXASSET** Form Name: **FAXASSET** Debug Mode: **Off**

Seq	Description	Level	Enabled
5	Do Not Allow Changes to Write Down Records on Books Screen	Function	<input checked="" type="checkbox"/>
6	Retirement Type is Mandatory	Function	<input checked="" type="checkbox"/>
7	Quick Addition Description Field All Uppercase	Function	<input checked="" type="checkbox"/>
8	Detail Addition Description Field All Uppercase	Function	<input checked="" type="checkbox"/>

Condition **Actions**

Seq	Type	Description	Language	Enabled
1	Property	Description all upper	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"/>

Object Type: **Item**

Target Object: **ADDITION_ADD.DESCRPTION**

Property Name: **CASE_RESTRICTION**

Value: **UPPERCASE**

Buttons: **Select By Text...**, **Get Value**, **Validate**, **Apply Now**

Record: 1/1 <OSC>

Repeat – Search from Workbench

The screenshot shows the Oracle Applications Form Personalizations (Asset Workbench) interface. The window title is "Oracle Applications - 7-Eleven, Inc. eBusiness Suite - IMD1-plslc052 (source: OFD2 03/18/2006)". The menu bar includes File, Edit, View, Folder, Tools, Window, and Help. The toolbar contains various icons for navigation and editing. The main area is titled "Form Personalizations (Asset Workbench)" and displays the following information:

- Function Name: FAXASSET
- Form Name: FAXASSET
- Debug Mode: Off

Seq	Description	Level	Enabled
7	Quick Addition Description Field All Uppercase	Function	<input checked="" type="checkbox"/>
8	Detail Addition Description Field All Uppercase	Function	<input checked="" type="checkbox"/>
9	Make Smart Find Description Field All Uppercase	Function	<input checked="" type="checkbox"/>
11	Tag Number Mandatory for Equipment - Quick Additions	Function	<input checked="" type="checkbox"/>

Below the table, there are tabs for "Condition" and "Actions". The "Condition" tab is active, showing the following fields:

- Trigger Event: WHEN-NEW-FORM-INSTANCE (You can enter additional event names.)
- Trigger Object: (Empty)
- Condition: (Empty)
- Processing Mode: Not in Enter-Query Mode

The "Context" section shows a table with the following data:

Level	Value
Site	

At the bottom of the interface, there are buttons for "Insert 'Get' Expression...", "Insert Item Value...", "Validate", and "Apply Now". The status bar at the very bottom shows "Record: 9/?" and "<OSC>".

Action- Search from Workbench

The screenshot displays the Oracle Applications Form Personalizations (Asset Workbench) interface. The window title is "Oracle Applications - 7-Eleven, Inc. eBusiness Suite - IMD1-plslc052 (source: OFD2 03/18/2006)". The menu bar includes File, Edit, View, Folder, Tools, Window, and Help. The toolbar contains various icons for file operations and help.

The main configuration area shows the following details:

- Function Name: **FAXASSET**
- Form Name: **FAXASSET**
- Debug Mode: **Off**

Seq	Description	Level	Enabled
7	Quick Addition Description Field All Uppercase	Function	<input checked="" type="checkbox"/>
8	Detail Addition Description Field All Uppercase	Function	<input checked="" type="checkbox"/>
9	Make Smart Find Description Field All Uppercase	Function	<input checked="" type="checkbox"/>
11	Tag Number Mandatory for Equipment - Quick Additions	Function	<input checked="" type="checkbox"/>

Below the list, the "Condition" and "Actions" tabs are visible. The "Actions" tab is active, showing a table of 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"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

Configuration details for the selected action:

- Select By Text...
- Object Type: **Item**
- Target Object: **SMART_FIND.DESCRPTION**
- Property Name: **CASE_RESTRICTION**
- Value: **UPPERCASE**

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

Record: 1/1 | ... | <OSC>

Results –Uppercase Entry

Oracle Applications - 7-Eleven, Inc. eBusiness Suite - IMM1 (copy of ODR2 as of 6/18/06 at 11:00)

File Edit View Folder Tools Window Help

ORACLE

Assets

QuickAdditions

Asset Number	<input type="text"/>	Description	ENGINE REPLACEMENT
Tag Number	<input type="text"/>	Category	<input type="text"/>
Serial Number	<input type="text"/>	Asset Key	<input type="text"/>
Asset Type	Capitalized	Units	1
Supplier Name	<input type="text"/>	Supplier Number	<input type="text"/>
Invoice Number	<input type="text"/>	PO Number	<input type="text"/>

Book

Book	<input type="text"/>	Cost	<input type="text"/>
Group Asset	<input type="text"/>	Date in Service	<input type="text"/>
Method	<input type="text"/>	<input checked="" type="checkbox"/> Depreciate	
Life Years	<input type="text"/>	Prorate Convention	<input type="text"/>
Months	<input type="text"/>	Prorate Date	<input type="text"/>

Assignment

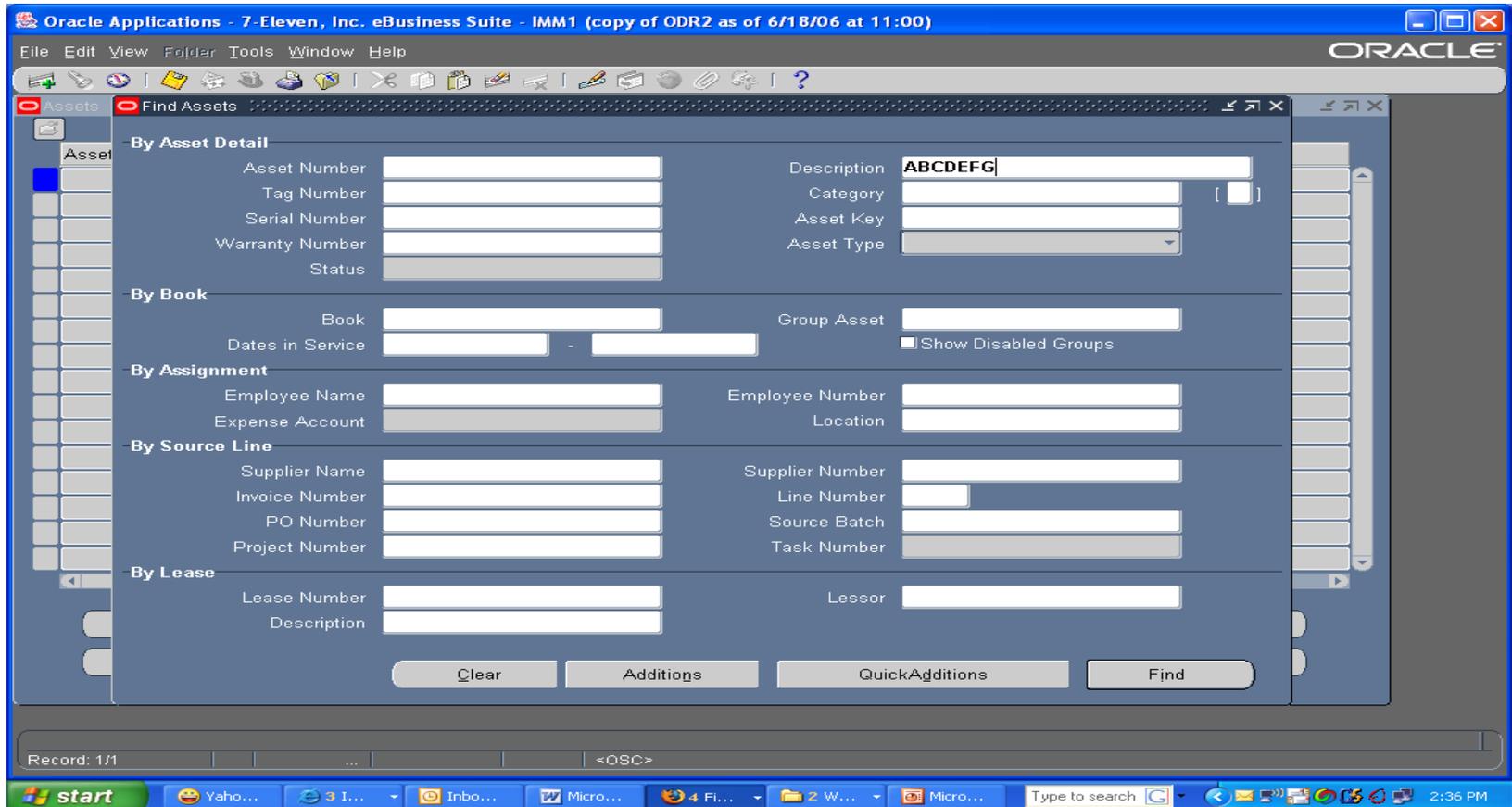
Units	Employee Name	Number	Expense Account	Location
<input type="text"/>				
<input type="text"/>				
<input type="text"/>				

Done Cancel

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

start Yahoo... 3 I... Inbo... Micro... 4 Fi... 2 W... Micro... Type to search 2:34 PM

Results – Uppercase Query -Find



The screenshot shows the Oracle Applications interface for the 'Find Assets' window. The window title is 'Oracle Applications - 7-Eleven, Inc. eBusiness Suite - IMM1 (copy of ODR2 as of 6/18/06 at 11:00)'. The interface includes a menu bar (File, Edit, View, Folder, Tools, Window, Help) and a toolbar with various icons. The main area is divided into several sections for filtering assets:

- By Asset Detail:** Fields for Asset Number, Tag Number, Serial Number, Warranty Number, Status, Description (containing 'ABCDEFGG'), Category, Asset Key, and Asset Type.
- By Book:** Fields for Book, Dates in Service, Group Asset, and a checkbox for 'Show Disabled Groups'.
- By Assignment:** Fields for Employee Name, Expense Account, Employee Number, and Location.
- By Source Line:** Fields for Supplier Name, Invoice Number, PO Number, Project Number, Supplier Number, Line Number, Source Batch, and Task Number.
- By Lease:** Fields for Lease Number and Lessor.

At the bottom of the window, there are buttons for 'Clear', 'Additions', 'QuickAdditions', and 'Find'. The status bar at the bottom left shows 'Record: 1/1' and '<OSC>'. The Windows taskbar at the very bottom shows the start button, several open applications (Yahoo, Internet Explorer, Inboxes, Microsoft Office Word, Microsoft Office Excel, Microsoft Office PowerPoint), a search bar, and the system clock showing 2:36 PM on 6/18/06.

Level of Effort Required

- About one Day for these items
- Takes time to research field names and table relationships
- Take time to test
- Results aren't always positive first time

Personalizations very Powerful- Except

Runtime Changes Only

- Cannot create new items
- Cannot move items between canvases
- Cannot display an item which is not on a canvas
- Cannot set certain properties
- Cannot change frames, graphics, boilerplate

● Certain Events Only –

- WHEN-NEW-FORM-INSTANCE, WHEN-NEW-BLOCK-INSTANCE, WHEN-NEW-RECORD-INSTANCE, WHEN-NEW-ITEM-INSTANCE
- WHEN-VALIDATE-RECORD (not in all forms)
- Product-specific events

Additionally - Other Business Rules were implemented easily and quickly

- Tag Number Mandatory for Equipment
- Use of a Single Unit Only
- Tax Types Can't Update Corporate Books
- Mass Retire – Warn if No location -
- Restriction on Update (who) can change a Tag Number
- Prevent Review of Values for Art Work
- Prevent certain Categories of Assets from being updated except by Key users

Other Tips -

- Have a Naming Convention for Error Messages – “PERS-99 – Not Allowed” –
- FNDLOAD to move between instances (see Syntax in Appendix)
- Tools Menu – Personalization Administration – Allows search of Functions that have rules defined
- Check before calling support with Forms bugs, SRs
- Upgrades/Patches will require research and testing– Forms **can** change – (see “Validate All” from Tools Menu)

In Summary

- Powerful Tool
- These Examples just scratch the surface
- Be willing to Experiment and be flexible
- There isn't always a custom event to attach to in every form
- Custom Development or 3rd Party tools are not always required

For More Information on Personalization

If you are not familiar with the basic construct of an Oracle Developer form, including terms such as *block*, *record*, *item*, *trigger*, *property* and *builtin*, you should consider a course such as *Oracle Developer: Forms Fundamentals*, offered by Oracle University.

Resources -

- Metalink – Note 279034.1
- Partner Training Materials
- Previously Developed documentation written for customers

About the Author

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 - Large number of Industries
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Appendix –Move Between Instances

Syntax to Move Between Instances:

Download:

```
FNDLOAD <userid>/<password> 0 Y DOWNLOAD  
$FND_TOP/patch/115/import/affrmcus.lct <filename.lct>  
FND_FORM_CUSTOM_RULES function_name=<function  
name>
```

Function_name is a required parameter; if it is not supplied then no personalizations are downloaded.

Upload:

```
FNDLOAD <userid>/<password> 0 Y UPLOAD  
$FND_TOP/patch/115/import/affrmcus.lct <filename.lct>
```

Appendix –Library v. Personalizations

- Related to Custom Library
- Library - No need for Forms builder or Compile
- Custom Library – supports more complex PL/SQL
- They both drive off same events
- Personalization First First, Then Custom Library processes
- Can use both at same time
- Use Custom Library when personalizations not powerful enough