



Oracle Applications Framework (OAF) Personalizations (New 2021 Examples)

e-business



OATUG
MICHIGAN

By
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ORACLE
ACE Director



Oracle Ace Director



30+ years E-Business Suite experience from R9.4 - R12.2.10

OATUG Star Presenter of the year, 2015

- 100s of presentations on E-Business Suite

Co-author for multiple books on E-Business Suite

- The ABCs of Workflow for E-Business Suite
- Release 12 and The Release 12 Primer – Shining a Light on the Release 12 World.

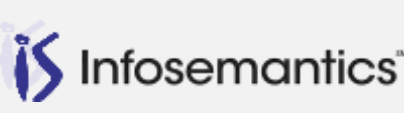
User Group Participation

- Treasurer – Dallas Oracle Users Group
- Chair-Oracle E-Business Suite User Management SIG
- Webmaster-Texas-Louisiana Oracle User Group TLOATUG
- Board Member – Customizations and Alternatives SIG

About the Company



CherryRoad
technologies



Infosemantics, a CherryRoad brand is a leading **Professional Services Firm** specializing in Oracle E-Business Suite, Cloud Solutions, Business Intelligence(BI) & Analytics, and Big Data Solutions.



20+ years
of experience



6 Worldwide
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Oracle ACE
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NETWORK



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Partner

Business Benefits

Profile Options

Personalization Workbench Enhancements in 12.2.9

Examples

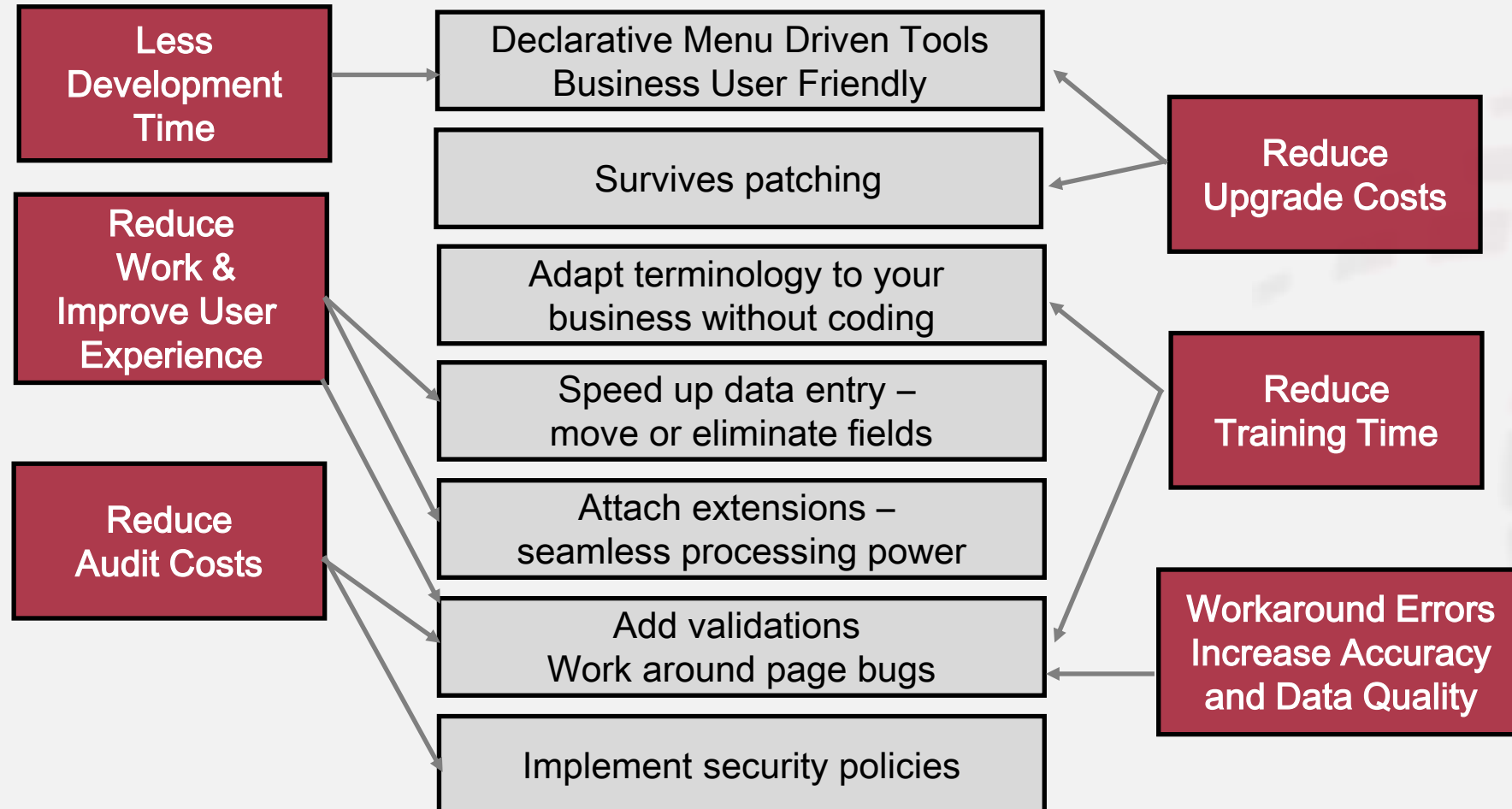
1. Clicking OK in Popup Information Closes Browser – personalization to fix this bug
2. Record History in 12.2.9
3. Workflow - disable all emails for a workflow type such as HR
 - **Change the number of rows displayed per page to facilitate this update**
4. Update 1099 type on purchase order line page and view on summary page
5. Add 1099 Type to purchase order line page with LOV
6. Change order of DFF attributes on page
7. Payables and Receivables Subledger Journal Entry Lines
 - a) **Personalize View**
 - b) **Save Searches without using personalization**
 - c) **Saved Search using personalization**

Undo and Copy Personalizations

Migration Between Instances

References

What are the Business Benefits to Personalizations? The ultimate goal is to save money!



Profile Options



Personalize Self-Service Defn

- Yes to allow 'Personalize' button to appear at the top of the page

FND: Personalization Region Link Enabled

- Yes to display all the regional links above each region
- Minimal to display key regional links

FND: Enable Personalization Workbench 12.2.7+

- Yes – Navigates to the personalization workbench
 - **If set to yes, ignores Personalization Region Link Enabled**
- No
 - **Recommended setting in 12.2.9+ to utilize region links**
 - **Navigates to the classic page hierarchy**
 - **12.2.9 – New “Personalization Workbench” button navigates from classic to workbench view so setting to Yes is not needed**

Disable Self-Service Personal

- Yes will disable all personalizations at any level

FND: Diagnostics

- Turns on 'About this Page' and 'Inspect MDS Contents' buttons
 - **Inspect MDS Contents shows Rich Table Interaction personalizations**

FND: Personalization Document Root Path

- Required to migrate personalizations
- Set this profile option to a tmp directory with open (777) permissions

FND: Enable Rich Table Interactions

- Set to Yes to allow users to dynamically resize tables and change column order using mouse
- Set Oracle Applications Look and Feel profile option to null
- Not set (null), which implies the standard for the release

FND: Enable Touch Gestures

- Set to true to enable gestures

FND:OA:Enable Defaults

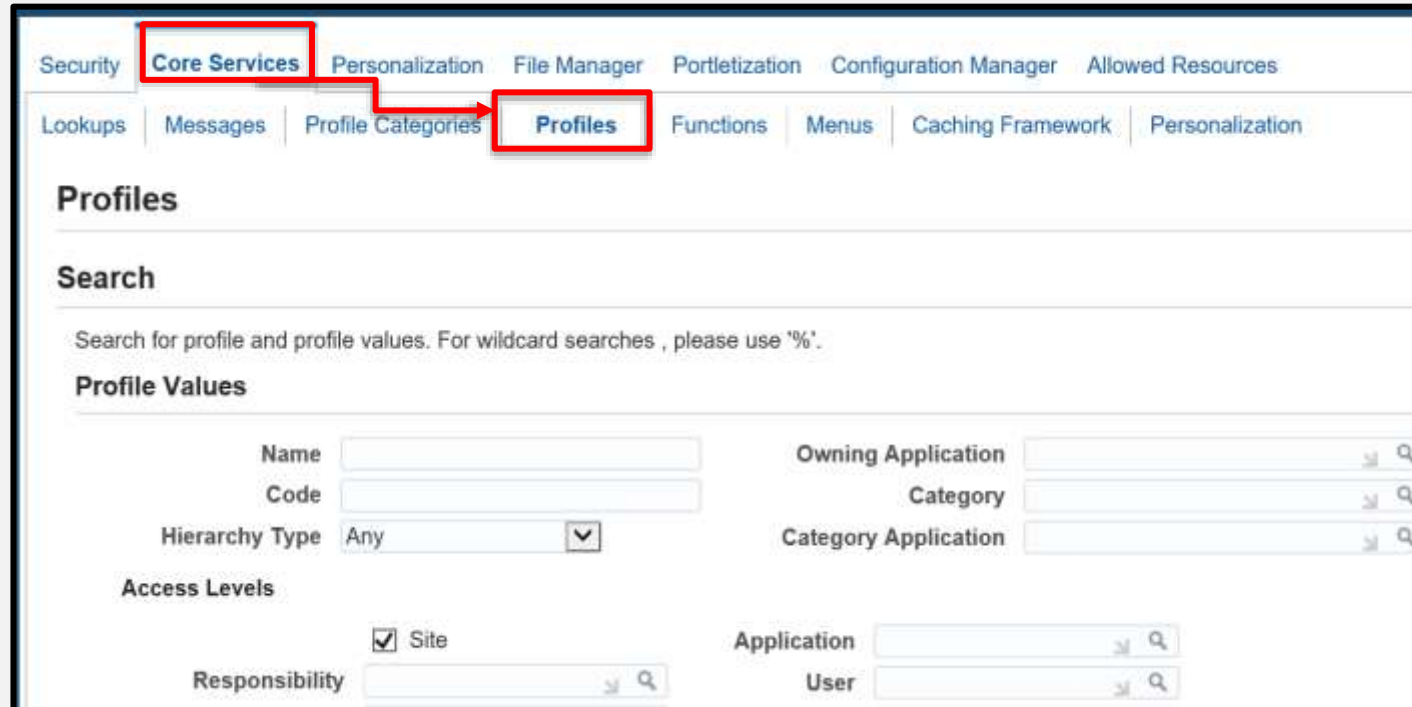
- Set to Y or N at the site or responsibility level
- Determines whether default values specified in personalizations are applied to your pages

References:

- OA Framework Profile Options appendix in the Oracle Application Framework Developer's Guide, MOS Doc ID 1315485.1, for more information about this profile
- OAF Personalization Guide section on setting default values

TIP – Change profile options in Functional Administrator → Core Services → Profiles for better performance

- **Sometimes** changing profiles through System Administration requires clearing cache



Security **Core Services** Personalization File Manager Portletization Configuration Manager Allowed Resources

Lookups Messages Profile Categories **Profiles** Functions Menus Caching Framework Personalization

Profiles

Search

Search for profile and profile values. For wildcard searches , please use '%'

Profile Values

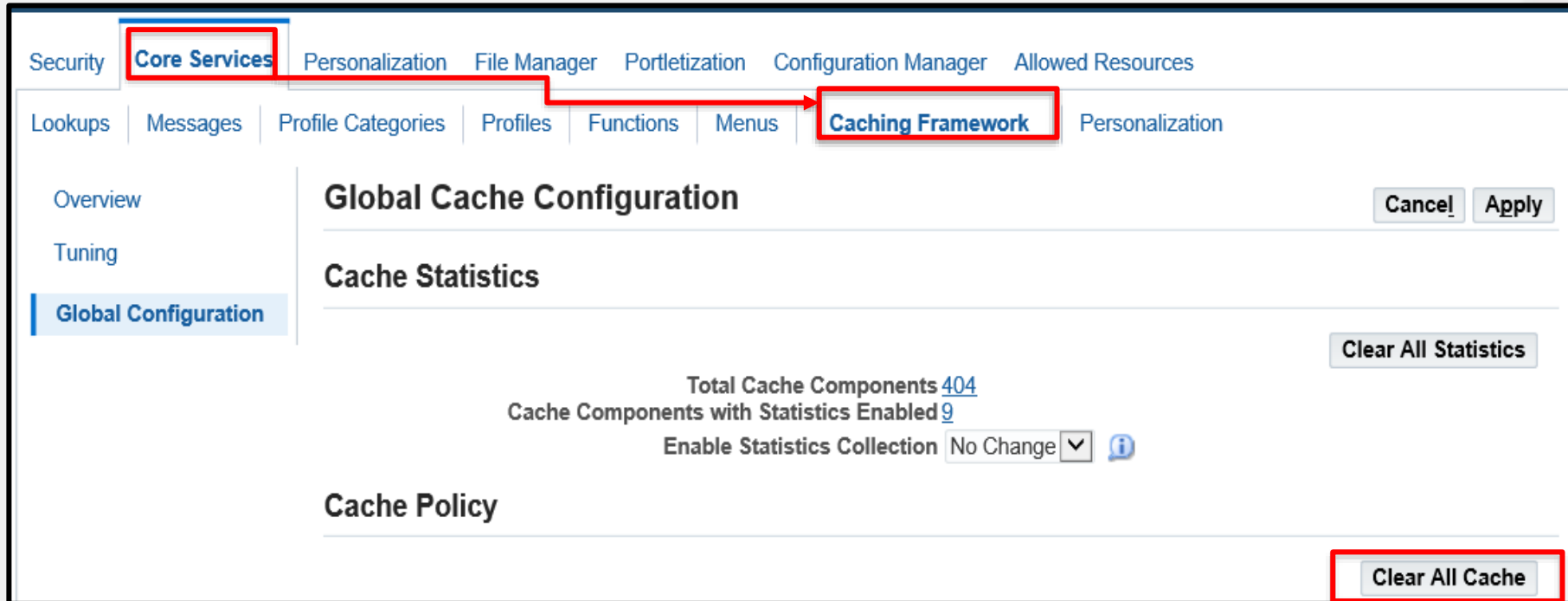
Name	<input type="text"/>	Owning Application	<input type="text"/>	<input type="button" value="Q"/>
Code	<input type="text"/>	Category	<input type="text"/>	<input type="button" value="Q"/>
Hierarchy Type	Any <input type="button" value="v"/>	Category Application	<input type="text"/>	<input type="button" value="Q"/>

Access Levels

<input checked="" type="checkbox"/> Site	Application	<input type="text"/>	<input type="button" value="Q"/>
Responsibility	<input type="text"/>	User	<input type="text"/>

When you need to clear cache

- Go to Functional Administrator – Core Services → Caching Framework
- Click **Clear All Cache**



Security **Core Services** Personalization File Manager Portletization Configuration Manager Allowed Resources

Lookups Messages Profile Categories Profiles Functions Menus **Caching Framework** Personalization


Overview
Tuning
Global Configuration

Global Cache Configuration

Cancel! Apply

Cache Statistics

Clear All Statistics

Total Cache Components [404](#)
Cache Components with Statistics Enabled [9](#)
Enable Statistics Collection No Change 

Cache Policy

Clear All Cache

Biggest challenge – finding the item to personalize

Search

Complete View

Expand All

Focus

<ctrl> F

Personalize Page: Oracle iProcurement: Requisitions

Return to Application Choose Context Manage Levels Model Personalization

Personalization Context

Scope Page: Oracle iProcurement: Requisitions
Document Name /oracle/apps/icx/por/reqmgmt/webui/ReqSummaryPG
Site Include
Organization Vision Operations
Responsibility iProcurement

Search

Style
Title/Prompt/Text
☐ Include Personalized Items Only
Go

Personalization Structure

☐ Simple View ☒ Complete View
Expand All | Collapse All

Focus	Name	Shown	User Personalizable	Personalize	Reorder	Create Item	Update Item	Delete Item	Seeded User Views	Customize Look And Feel
	Page Layout: Oracle iProcurement: Requisitions									
	Page Status									
	Table Layout: (SearchButtonRG)	Yes								
	Row Layout: (SearchButtonRG.SearchButtonRow)	Yes								
	Default Single Column: Views	Yes								
	Default Single Column: (ViewRN)	Yes								

R12.2 – Return to Application now at top and bottom of the page



The Personalization Workbench now uses a masonry layout with accordion views for the property and component palettes

Support is also added for some Rich Table Interactions

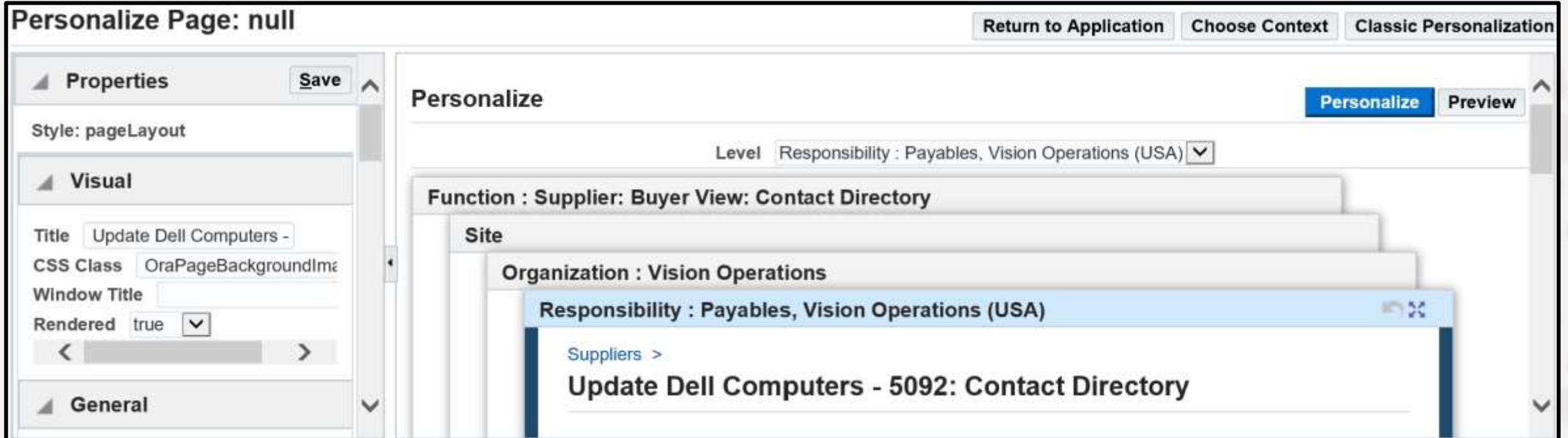
- Hiding and reordering columns
- Page-level buttons
- Return to" navigation link



Note the component palette on the left and property palette on the right

The screenshot displays the Oracle Payables Personalization Workbench interface. The top navigation bar includes the Oracle Payables logo and links for Home, Favorites, Settings, Worklist, and user information (Logged In As OPERATIONS). The main content area is titled "Suppliers" and shows a "Personalize Page: null" view. On the left, a "Component Palette" lists various UI components: Button, Export Button, Flexfield, Formatted Text, Form Value, Image, and Link. The central "Personalize" area shows a hierarchy of components: Function (Supplier: Buyer View: Contact Directory), Site, Organization (Vision Operations), and Responsibility (Payables, Vision Operations (USA)). The selected component is "Update Dell Computers - 5092: Contact Directory", which includes a "Search" field. On the right, a "Property Palette" allows for customization of the selected component, with sections for Visual (Title, CSS Class, Window Title, Rendered), General (Help Target Appl Short Name, Help Target), Functional (Multi-tab Enabled, Controller Class), and Advanced properties. The "Controller Class" is set to "oracle.apps.pos.supplier.v".

In 12.2.9 the component and properties palettes are moved to the left



Personalize Page: null [Return to Application](#) [Choose Context](#) [Classic Personalization](#)

Properties [Save](#)

Style: pageLayout

Visual

Title

CSS Class

Window Title

Rendered ☒ true

General

Personalize [Personalize](#) [Preview](#)

Level

Function : Supplier: Buyer View: Contact Directory

Site

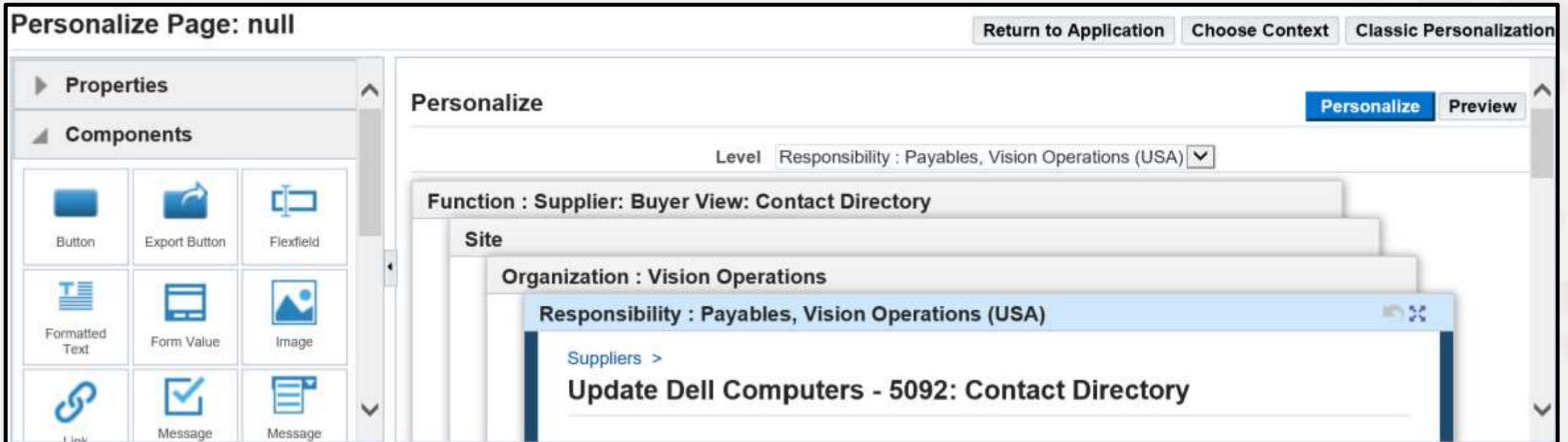
Organization : Vision Operations

Responsibility : Payables, Vision Operations (USA)

[Suppliers >](#)

Update Dell Computers - 5092: Contact Directory

- The accordion features allows the user to expand the properties or components palette using arrows
- Components are displayed as icons



Personalize Page: null

Return to Application Choose Context Classic Personalization

Properties

Components

- Button
- Export Button
- Flexfield
- Formatted Text
- Form Value
- Image
- Link
- Message
- Message

Personalize

Personalize Preview

Level Responsibility : Payables, Vision Operations (USA)

Function : Supplier: Buyer View: Contact Directory

Site

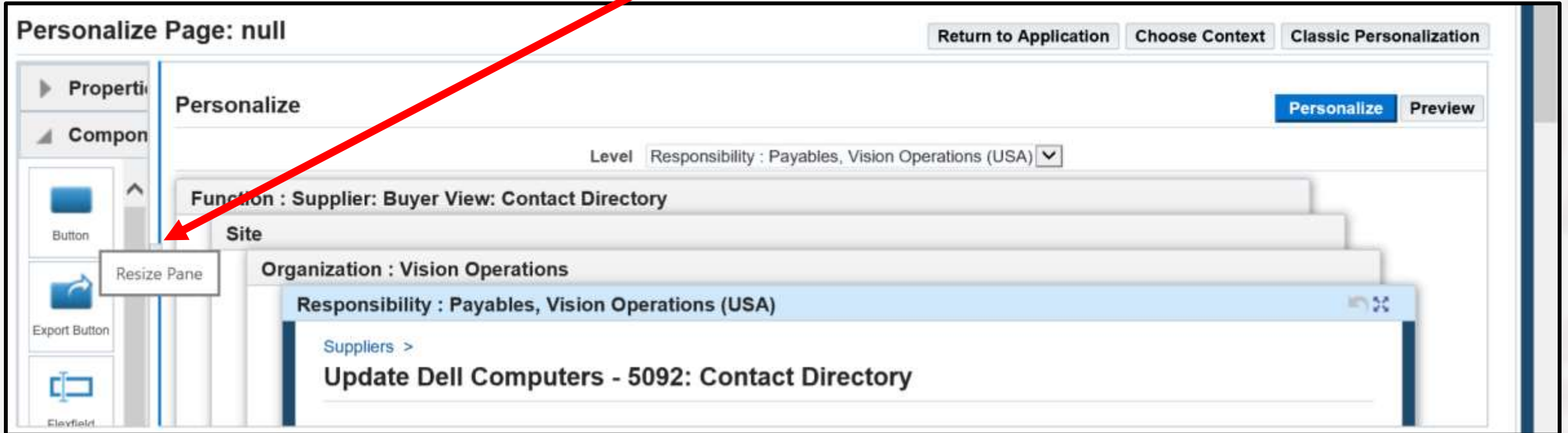
Organization : Vision Operations

Responsibility : Payables, Vision Operations (USA)

Suppliers >

Update Dell Computers - 5092: Contact Directory

Rich table interaction allows the user to hide or resize the left panel



Personalize Page: null

Return to Application Choose Context Classic Personalization

Personalize Personalize Preview

Level Responsibility : Payables, Vision Operations (USA) ▼

Function : Supplier: Buyer View: Contact Directory

Site

Organization : Vision Operations

Responsibility : Payables, Vision Operations (USA)

Suppliers >

Update Dell Computers - 5092: Contact Directory

Personalization Examples 2021




Personalization to workaround bug that closes application after hitting ok button on some hints

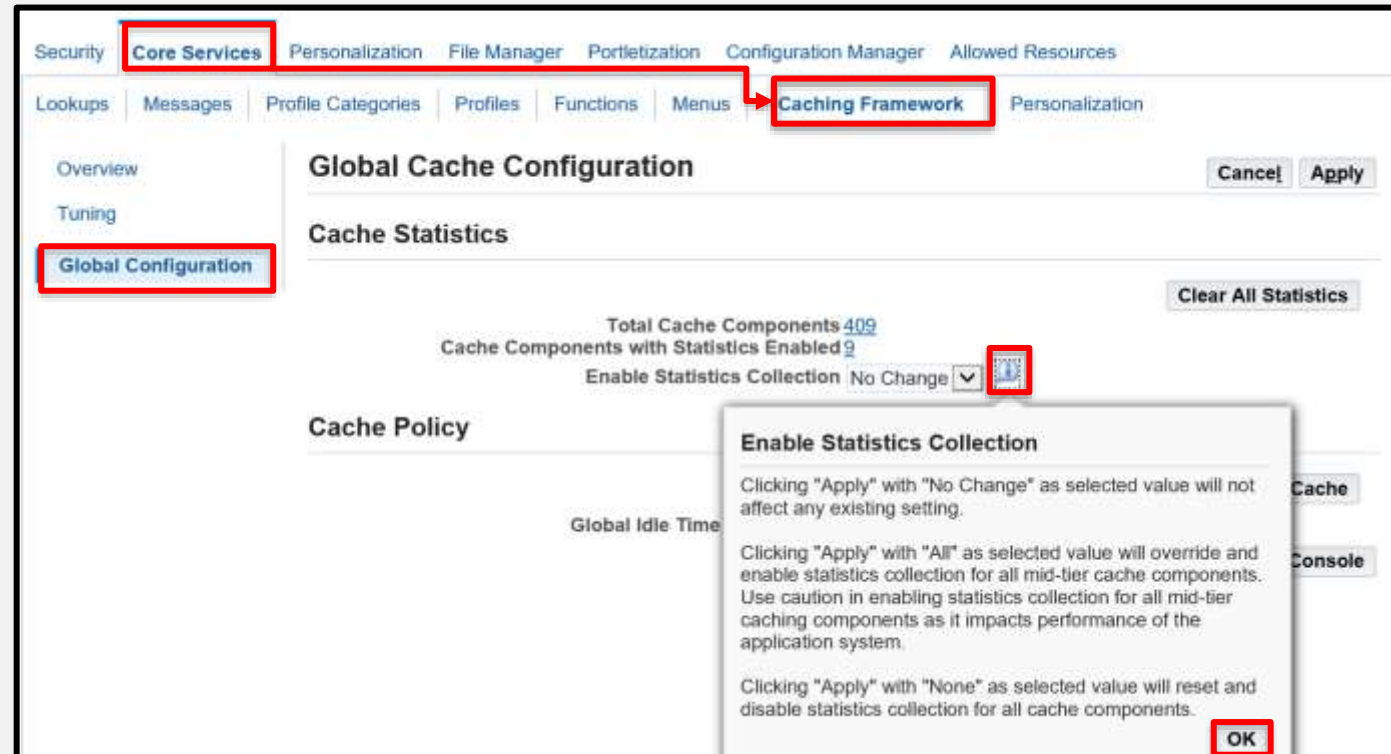


Workaround Oracle
Application Errors



Bug – when clicking on the  in Functional Administrator → Core Services → Caching Framework → Global , then clicking **OK**, the entire browser window will close

- This happens in **some** other pages as well

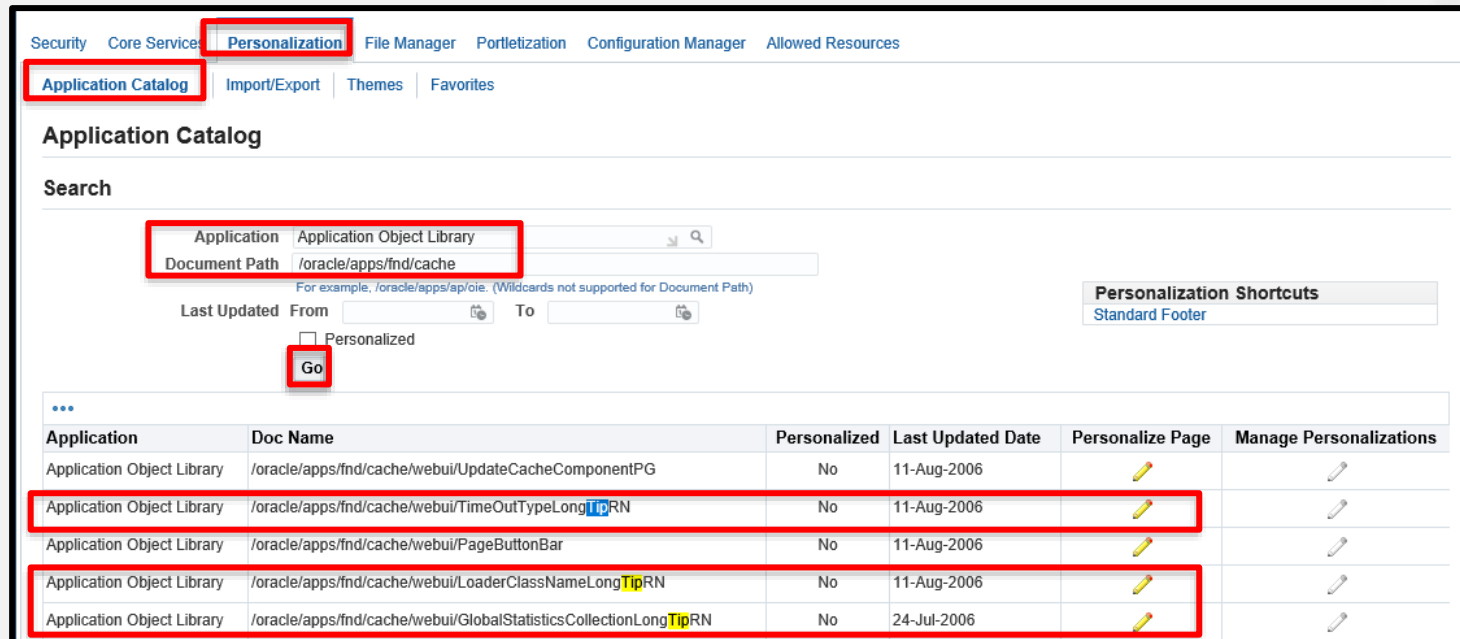


Tips are their own java page and not accessible via Tools → Personalization

To access these tips, Go to Functional Administrator → Personalization → Application Catalog; Click **Go**

Choose the Application Name and Document Path shown below

- Use <ctrl> F or Scroll through the list to find the correct tips since wildcard searches are not allowed, then click the pencil to edit applicable tips



Security Core Services **Personalization** File Manager Portletization Configuration Manager Allowed Resources

Application Catalog Import/Export Themes Favorites

Application Catalog

Search











Application: Application Object Library
Document Path: /oracle/apps/fnd/cache
For example, /oracle/apps/apoie. (Wildcards not supported for Document Path)

Last Updated From: To:

☐ Personalized

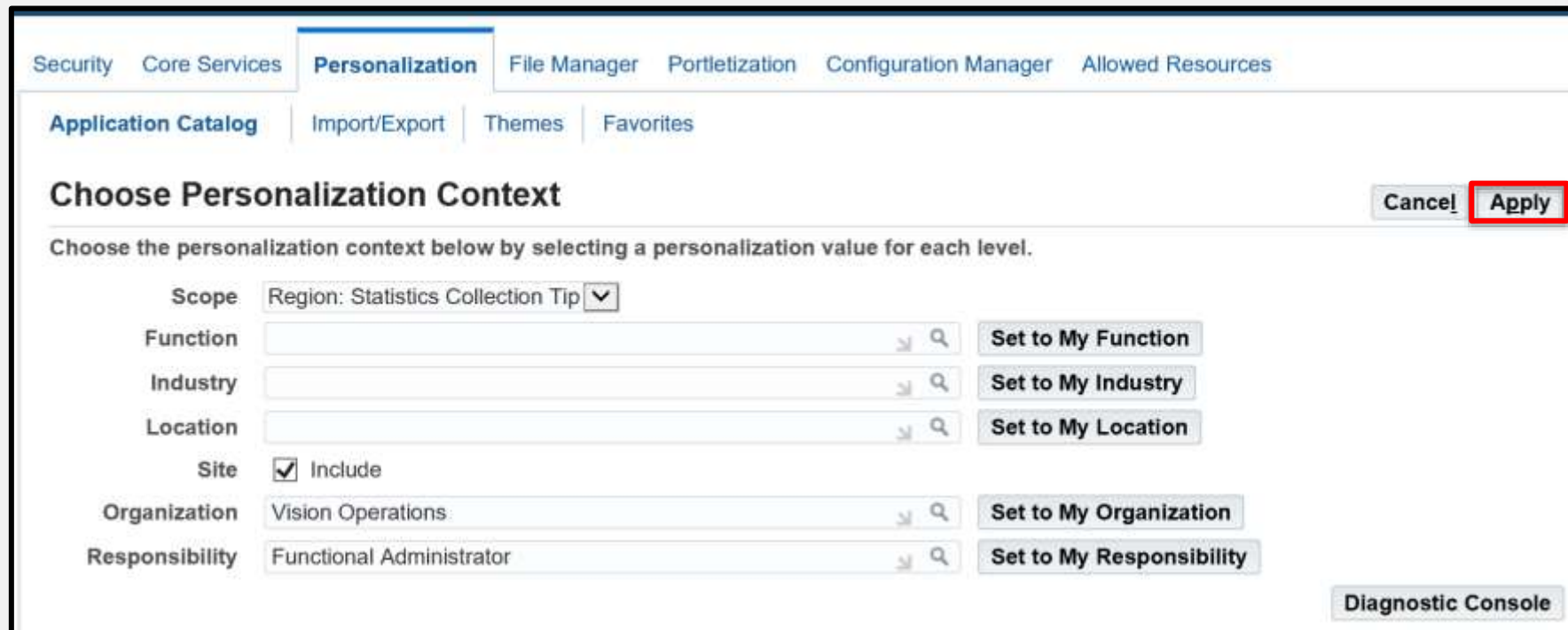
Go

Personalization Shortcuts
[Standard Footer](#)

Application	Doc Name	Personalized	Last Updated Date	Personalize Page	Manage Personalizations
Application Object Library	/oracle/apps/fnd/cache/webui/UpdateCacheComponentPG	No	11-Aug-2006		
Application Object Library	/oracle/apps/fnd/cache/webui/TimeoutTypeLongTipRN	No	11-Aug-2006		
Application Object Library	/oracle/apps/fnd/cache/webui/PageButtonBar	No	11-Aug-2006		
Application Object Library	/oracle/apps/fnd/cache/webui/LoaderClassNameLongTipRN	No	11-Aug-2006		
Application Object Library	/oracle/apps/fnd/cache/webui/GlobalStatisticsCollectionLongTipRN	No	24-Jul-2006		

In this case, the Region: Statistics Collection Tip needs modification

On the **Personalization Context** page, click **Apply**




On the **Personalization Structure** page, click the pencil for the **Button: OK** row

Personalization Structure












☒ Simple View

☐ Complete View

 TIP

In simple view mode, some items or regions may not be visible in the page structure and the reorder or create icon may be disabled for certain nodes. Please switch to complete view mode if you need full personalization capabilities over all items and regions.

[Expand All](#) | [Collapse All](#)

Focus	Name	Shown	User Personalizable	Personalize	Reorder	Create Item	Update Item	Delete Item	Seeded User Views	Customize Look And Feel	Show in Complete View
	▲ Default Single Column: Statistics Collection Tip	Yes									
	Static Styled Text: "Enabled" will override and enable statistics collection for this cache components."Disabled" will reset and disable statistics collection for this cache component.	Yes									
	Static Styled Text: "Disabled" will reset and disable statistics collection for this cache component.	Yes									
	Button: OK	Yes									

Fix for Bug - Clicking OK in Popup Information



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Set the **Rendered** property to **false** at the site level

Click **Apply**

Personalize Button : OK Cancel Apply

Personalization Context

Scope Region: Statistics Collection Tip
Document Name /oracle/apps/fnd/cache/webui/StatCollectionLongTipRN
Site Include
Organization Vision Operations
Responsibility Functional Administrator

Personalization Properties

Clear Personalization Choose Levels Displayed

	Original Definition	Site	Organization: Vision Operations	Responsibility: Functional Administrator	Result / Source
Access Key	Default	Inherit	Inherit	Inherit	Default / Original Definition
Additional Text	Default	Inherit	Inherit	Inherit	Default / Original Definition
Admin Personalization	true	Inherit	Inherit	Inherit	true / Original Definition
CSS Class	Default	Inherit	Inherit	Inherit	Default / Original Definition
Destination Function	Default	Inherit	Inherit	Inherit	Default / Original Definition
Destination URI	javascript:top.close();	Inherit	Inherit	Inherit	javascript:top.close(); / Original Definition
Export View Attribute	Default	Inherit	Inherit	Inherit	Default / Original Definition
Icon URI	Default	Inherit	Inherit	Inherit	Default / Original Definition
Popup Enabled	false	Inherit	Inherit	Inherit	false / Original Definition
Popup ID	Default	Inherit	Inherit	Inherit	Default / Original Definition
Popup Render Event	onClick	Inherit	Inherit	Inherit	onClick / Original Definition
Prompt	OK	Inherit	Inherit	Inherit	OK / Original Definition
Rendered	true	false	Inherit	Inherit	false / Site

Click **Return to Application Catalog Page**

[Security](#) [Core Services](#) [Personalization](#) [File Manager](#) [Portletization](#) [Configuration Manager](#) [Allowed Resources](#)

[Application Catalog](#) [Import/Export](#) [Themes](#) [Favorites](#)

Personalize Region: Statistics Collection Tip

[Return to Application Catalog Page](#) [Choose Context](#) [Manage Levels](#) [Personalization Workbench](#)

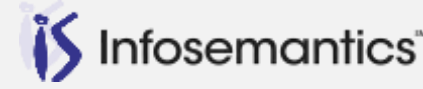
▲ Personalization Context

Scope	Region: Statistics Collection Tip
Document Name	/oracle/apps/fnd/cache/webui/StatCollectionLongTipRN
Site	Include
Organization	Vision Operations
Responsibility	Functional Administrator

Fix for Bug - Clicking OK in Popup Information



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The **OK** button is now gone

Moving the cursor outside the popup removes the popup

The screenshot shows the 'Global Cache Configuration' page in a web application. The page has a top navigation bar with tabs: Security, Core Services (selected), Personalization, File Manager, Portletization, Configuration Manager, and Allowed Resources. Below this is a sub-navigation bar with: Lookups, Messages, Profile Categories, Profiles, Functions, Menus, Caching Framework (selected), and Personalization. On the left, there's a sidebar with 'Overview', 'Tuning', and 'Global Configuration' (selected). The main content area is titled 'Global Cache Configuration' and includes sections for 'Cache Statistics' and 'Cache Policy'. In the 'Cache Statistics' section, there are statistics: 'Total Cache Components 409' and 'Cache Components with Statistics Enabled 9'. Below these is a dropdown menu for 'Enable Statistics Collection' currently set to 'No Change', with an information icon (i) to its right. An information popup is displayed over this dropdown, titled 'Enable Statistics Collection'. The popup contains three paragraphs of text explaining the effects of clicking 'Apply' with different values: 'No Change' (no effect), 'All' (overrides and enables statistics), and 'None' (resets and disables statistics). To the right of the main content area, there are buttons: 'Cancel', 'Apply', 'Clear All Statistics', 'Clear All Cache', and 'Diagnostic Console'.

Security | **Core Services** | Personalization | File Manager | Portletization | Configuration Manager | Allowed Resources

Lookups | Messages | Profile Categories | Profiles | Functions | Menus | **Caching Framework** | Personalization

Overview
Tuning
Global Configuration

Global Cache Configuration

Cache Statistics

Total Cache Components [409](#)
Cache Components with Statistics Enabled [9](#)

Enable Statistics Collection No Change

Cache Policy

Global Idle Time

Enable Statistics Collection

Clicking "Apply" with "No Change" as selected value will not affect any existing setting.

Clicking "Apply" with "All" as selected value will override and enable statistics collection for all mid-tier cache components. Use caution in enabling statistics collection for all mid-tier caching components as it impacts performance of the application system.

Clicking "Apply" with "None" as selected value will reset and disable statistics collection for all cache components.

Cancel Apply

Clear All Statistics

Clear All Cache

Diagnostic Console



Record History

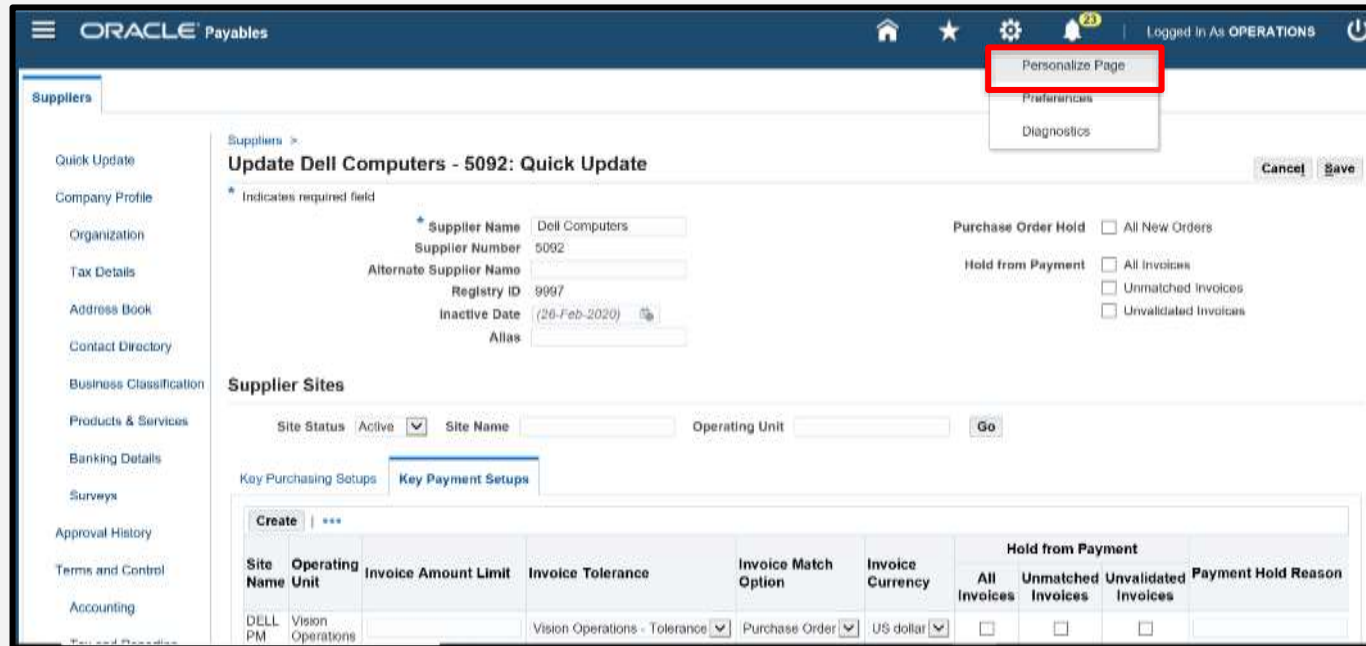


Reduce Audit Cost,
Data Quality



More tables with record history are enabled in each new release

1. 12.0.6+ Set FND: Record History Enabled to Yes to enable record history for a Header, Table or Advanced Table region
2. If #1 doesn't work, click **Personalize Page** to try a personalization to turn on record history for a specific region



ORACLE Payables

Suppliers

Quick Update

Company Profile

Organization

Tax Details

Address Book

Contact Directory

Business Classification

Products & Services

Banking Details

Surveys

Approval History

Terms and Control

Accounting

Update Dell Computers - 5092: Quick Update

* Indicates required field

Supplier Name: Dell Computers

Supplier Number: 5092

Alternate Supplier Name

Registry ID: 9097

Inactive Date: (26-Feb-2020)

Alias

Purchase Order Hold: ☐ All New Orders

Hold from Payment: ☐ All Invoices, ☐ Unmatched Invoices, ☐ Unvalidated Invoices

Supplier Sites

Site Status: Active, Site Name, Operating Unit, Go

Key Purchasing Setups

Key Payment Setups

Site Name	Operating Unit	Invoice Amount Limit	Invoice Tolerance	Invoice Match Option	Invoice Currency	Hold from Payment			Payment Hold Reason
						All Invoices	Unmatched Invoices	Unvalidated Invoices	
DELL PM	Vision Operations		Vision Operations - Tolerance	Purchase Order	US dollar	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Click in the “Supplier Sites” region and then on the Properties palette on the left, scroll down to set the **Record History Enabled** property to **true**

Then scroll back up to click **Save** then, **Return to Application**

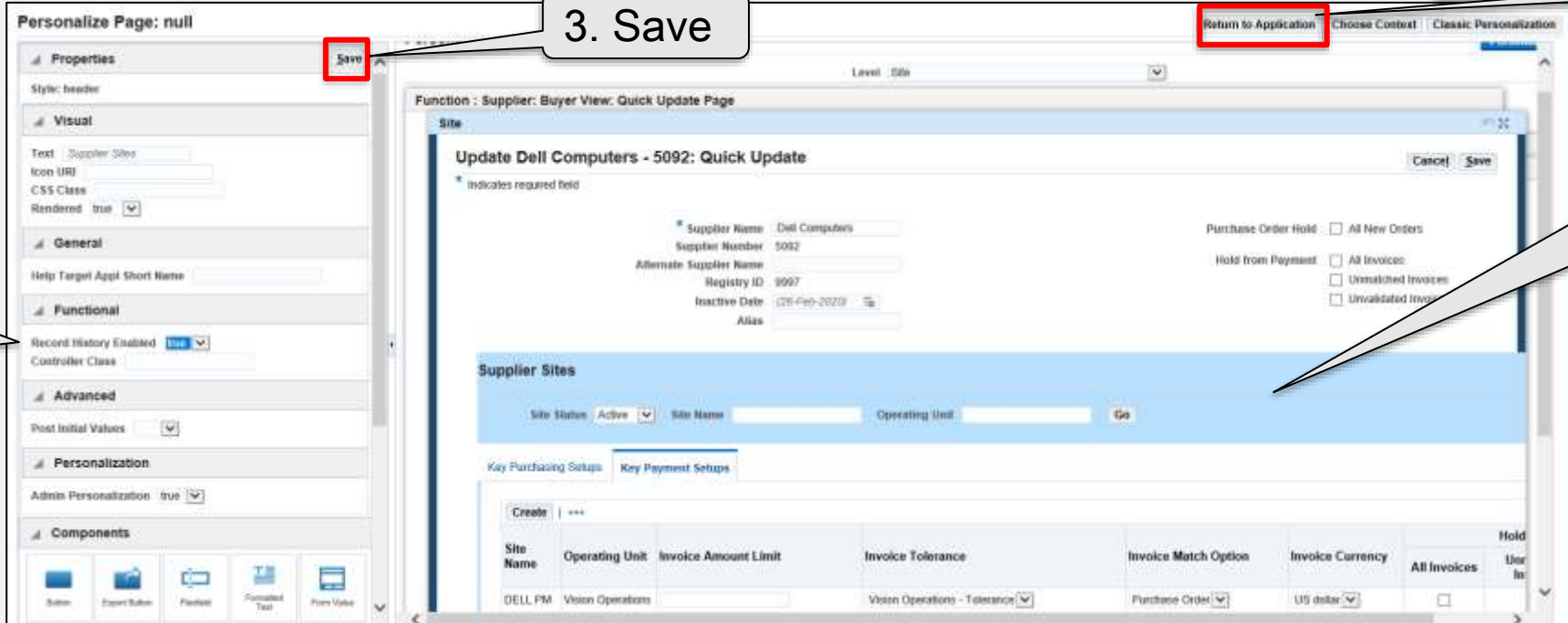
* Personalization Workbench View

2. Set to True

3. Save

4. Return to Application

1. Click in this region



The screenshot displays the Oracle Personalization Workbench interface. On the left, the 'Properties' palette is open, showing the 'Functional' tab where 'Record History Enabled' is set to 'true'. A red box highlights the 'Save' button at the top of the palette. In the center, the 'Supplier Sites' region is highlighted with a blue background. A callout points to this region with the text '1. Click in this region'. Below the region, there is a table with columns: Site Name, Operating Unit, Invoice Amount Limit, Invoice Tolerance, Invoice Match Option, Invoice Currency, All Invoices, and Hold. The table contains one row with the values: DELL PM, Vision Operations, Vision Operations - Tolerance, Purchase Order, US dollar, and a checkbox. At the top right of the workbench, a red box highlights the 'Return to Application' button. A callout points to this button with the text '4. Return to Application'. Another callout points to the 'Save' button with the text '3. Save'. A callout points to the 'Record History Enabled' property with the text '2. Set to True'. A red box at the top left of the workbench contains the text '* Personalization Workbench View'.

Choose a site and click the record history icon that is now on the page

Suppliers >

Update Dell Computers - 5092: Quick Update

Cancel Save


* Indicates required field

* Supplier Name

Supplier Number

Alternate Supplier Name

Registry ID

Inactive Date 

Alias

Purchase Order Hold ☐ All New Orders

Hold from Payment ☐ All Invoices

☐ Unmatched Invoices






☐ Unvalidated Invoices

Supplier Sites

Site Status Site Name Operating Unit

Key Purchasing Setups Key Payment Setups

Create | ...

Site Name	Operating Unit	Ship-To Location	Bill-To Location	Ship Via	Pay On	Alternate Pay Site
DELL PM	Vision Operations	M1- Seattle Mfg 	V1- New York City 	<input type="text"/> 	<input type="text"/> 	<input type="text"/> 

Record History

Last Updated Date 26-Feb-2020 02:37:13
Last Updated By OPERATIONS
Creation Date 26-Feb-2020 02:37:13
Created By OPERATIONS
Last Update Login 7326976

Record history icon now shown for Supplier Sites; Click for record history popup

If the enable record history property does not work, create the fields manually with a modal personalization using an adhoc query

For the detailed instructions, download the presentation at:

- <https://infosemantics.com/presentation-downloads/>
- The OAUG Conference Paper Database at <https://oaug.org/education-events>
 - Search for my presentations and find the presentation at Collaborate 17

Must login as OATUG member to download presentations

Conference Paper Database Search

 Behn  Filter 

Results (25)

Even more Forms and OAF Personalization Examples-2015

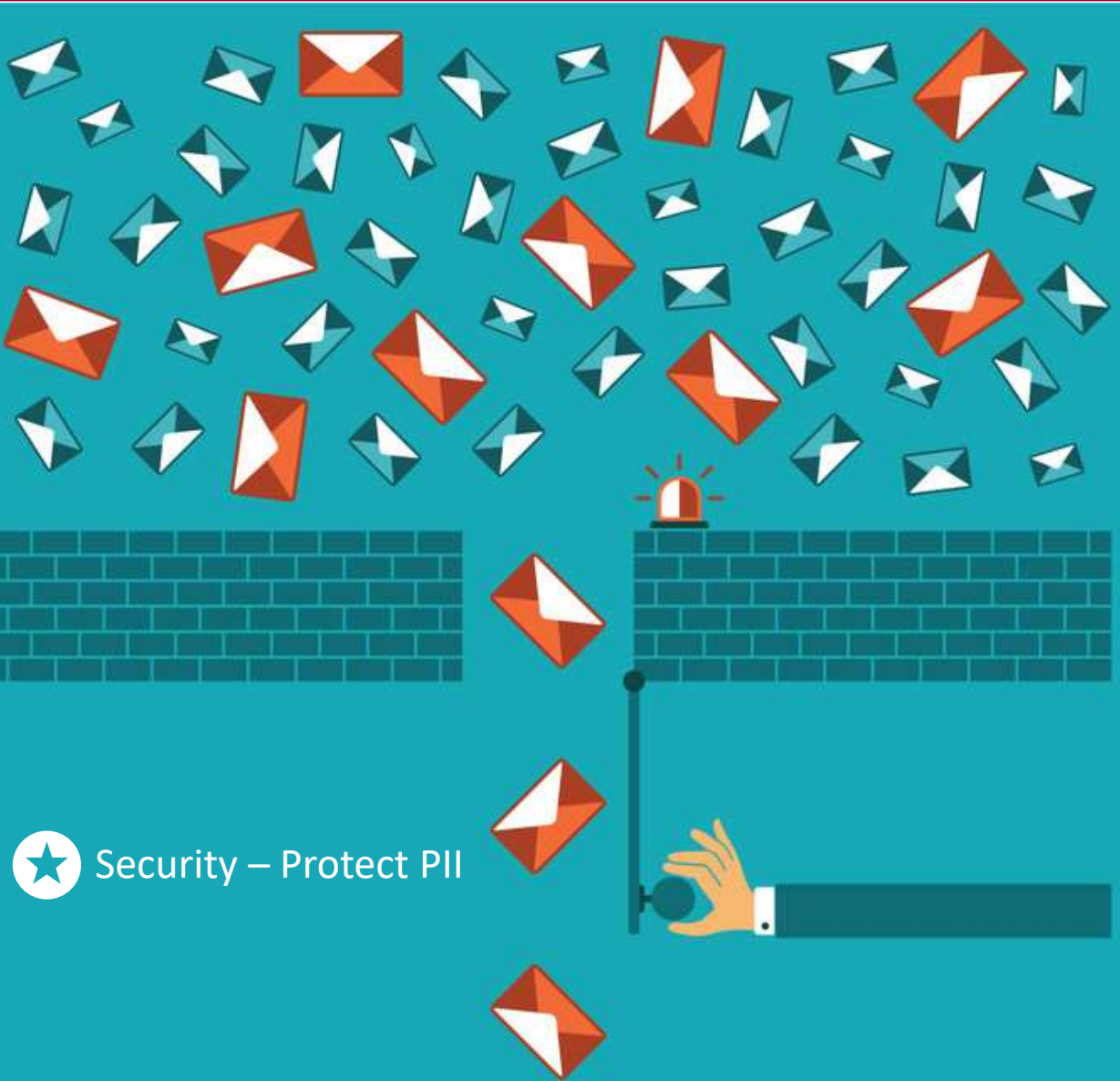
This is the newest version of this personalization ...

Ten More Forms and OAF Personalization Examples - Version 3...Updated for R12.2

☒ 14. OAF Personalization Examples - Great rewards with low effort

(COLLABORATE 17)

This presentation benefits managers who need to know what can be done easily as well as functional superusers and developers who need to understand how to do it without customizing. OAF personalizations ...



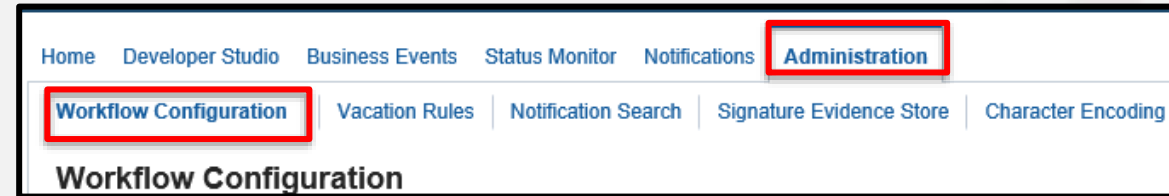
Security – Protect PII

Workflow – Disable email distribution of specific messages

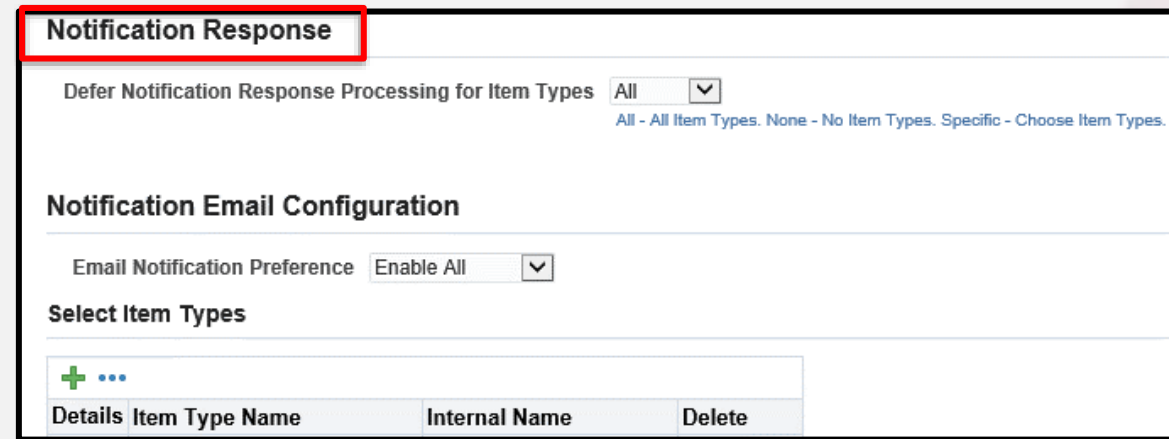


Users now can manually enable/disable email delivery for specific item types or specific messages to provides added level of security for specific emails containing PII or other personal information such as many HR emails

■ Workflow → Administration → Workflow Configuration




■ Scroll down to the Notification Response section





Default is **Enable All**


Choose Enable Specific or Disable Specific

Click the 

Choose an Item Type, then click the arrow to expand

Must select each message to disable

- To select all, user must click through each page (next 10) and check the top checkbox for all **on each page**





Notification Email Configuration

Email Notification Preference: **Disable Specific**
Enable All
Enable Specific

Select Item Types

+ ...

Details	Item Type Name	Internal Name	Delete
	HR	HRSSA	

Select Workflow Messages

Previous 10 101 - 110 Next 10

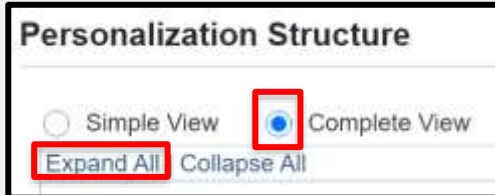
<input checked="" type="checkbox"/>	Message Name	Internal Name
<input type="checkbox"/>	Notify MA of Appraisal Complete	HR_NTFY_MA_COMPLETE_MSG
<input type="checkbox"/>	Notify MA of Pending Appraisee Feedback	HR_NTFY_MA_PENDAPPR_MSG
<input type="checkbox"/>	V5.0 Notify Approval Owner Of Approval	HR_NTFY_APPROVAL_OWNER_V5_MSG
<input type="checkbox"/>	Notify MA of Feedback from Appraisee	HR_NTF_MA_AFT_FBCK_MSG
<input type="checkbox"/>	Notify Approval Owner Of Approval Details V4.0	HR_NTFY_APPR_OWNER_V4_DET_MSG
<input type="checkbox"/>	Notify Final Rejection V5.0	HR_NTFY_FINAL_REJECTION_V5_MSG
<input type="checkbox"/>	Notify Final Rejection Employee V4.0	HR_NTFY_FINAL_REJ_EMP_V4_MSG
<input type="checkbox"/>	Notify Main Appraiser of participant complete	HR_PART_TO_MAIN_APPRAISER_MSG
<input checked="" type="checkbox"/>	Personal Information Generic JSP Msg V4.0	HR_PERINFO_GENERIC_JSP_MSG
<input checked="" type="checkbox"/>	Personal Information Overview JSP Msg V4.0	HR_PERINFO_OVERVIEW_JSP_MSG

Previous 10 101 - 110 Next 10

Cancel Apply

Pro tip: Personalize the page to set the records displayed to a higher number

- Click the **Complete View** radio button and **Expand All** link



Personalization Structure

☐ Simple View ☒ Complete View

[Expand All](#) [Collapse All](#)

- Use <ctrl> F to search for “Select Workflow Messages”
- Click the pencil to edit the Advanced table



Header: Select Workflow Messages	Yes		
Advanced Table: (MsgLevelMailPrefRN.MsgTable)	Yes		

- Set the **Records Displayed** property to a higher number than the total number of records



Records Displayed	Default	<input type="text" value="300"/>	
--------------------------	---------	----------------------------------	---

- Click **Apply** and **Return to Application**

| Next and previous links are now gone because the number of rows is higher than the number of records

Details

Item Type Name

Internal Name

Delete

▲

HR

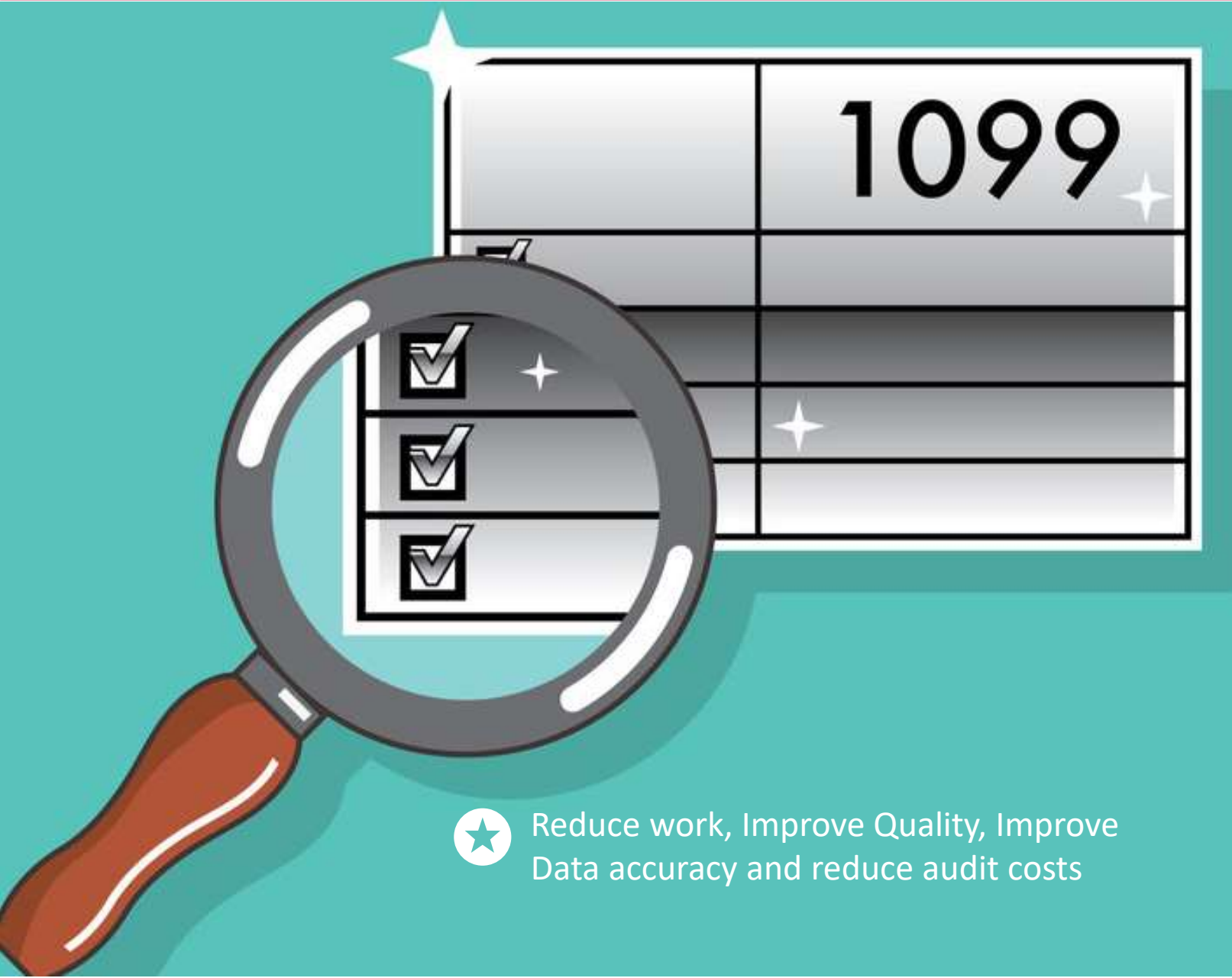
↗ 🔍

HRSSA

🗑️

Select Workflow Messages

<input type="checkbox"/> Message Name	Internal Name
<input type="checkbox"/> Confirmation Transition Message	HRSS_REVIEW_JSP_MSG
<input type="checkbox"/> Appraisal Commit Application Error Message to MA	HR_APPRAISAL_COMMAPPLERR_MSG
<input type="checkbox"/> Appraisal Commit Application Error Msg to HR Rep	HR_APPRAISAL_COMMIT_APPERR_MSG
<input type="checkbox"/> Notify Appraiser Completion of Appraisal	HR_APPRAISAL_COMPLETE_MSG
<input type="checkbox"/> Notify the Manager Completion of Appraisal	HR_APPRAISAL_COMP_MGR_MSG
<input type="checkbox"/> Notify Appraiser of Appraisal Complete	HR_APPRAISAL_COM_APPRAISER_MSG
<input type="checkbox"/> Notify Appraiser for Feed back	HR_APPRAISAL_FEEDBACK_MSG
<input type="checkbox"/> Notify New main appraiser of an appraisal	HR_APPRAISAL_MACHANGE_MGR_MSG
<input type="checkbox"/> Notify Appraiser Change of Main Appraiser	HR_APPRAISAL_MACHANGE_MSG



Reduce work, Improve Quality, Improve
Data accuracy and reduce audit costs

**Update 1099 Type
on PO Line**

When the invoice is matched to a PO, the 1099 type is copied to the invoice line from the PO line

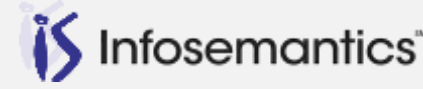
- If the vendor does not have a 1099 type when the PO is created, invoice amounts will be missing when the 1099s are generated
- The Update Income Tax Details Utility must be run separately for each supplier to correct this issue
- Time consuming for multi year purchase orders for large organizations
- Client wanted to fix data on PO to minimize on-going need to run utility

PO re-approval is not required when the 1099 type is updated on the PO

Update 1099 Type on PO



CherryRoad[®]
technologies



Navigate to **Purchasing → Buyer Work Center → Orders**

Click on the **Lines** tab

First, we want to make sure the 1099 Type displays on this page

Click the **Personalize Page** link

The screenshot shows the Oracle Purchasing interface. At the top, there is a navigation bar with tabs: Requisitions, Initiatives, Negotiations, **Orders**, Agreements, Deliverables, Suppliers, Notes, Awards, and IDVs. Below this, the 'Orders' section is active, showing a 'Create' button and a dropdown menu set to 'Standard Purchase Order' with a 'Go' button. A legend indicates that a yellow lock icon means 'Indicates supplier is editing the document' and a blue circle icon means 'Indicates a pending change request'. Below the legend, there are tabs for 'Headers', **Lines** (which is highlighted with a red box), 'Schedules', 'Pay Items', and 'Distributions'. Under the 'Lines' tab, there is a 'New Search' dropdown and a 'Show Filters' link. Below this, there is a 'Select Line:' dropdown set to 'Update Line' with a 'Go' button, and an 'Export' button. A table displays the order lines, with the first line selected. The table has columns: Order, Supplier, Line, Item/Job, Rev, Description, Category, Qty, Unit, and Price. The first line is Order 6571, Supplier Allied Manufacturing, Line 1, Item/Job, Rev, Description Company Car, Category MISC.MISC, Qty 1, Unit Each, and Price 36706.

Order	Supplier	Line	Item/Job	Rev	Description	Category	Qty	Unit	Price
6571	Allied Manufacturing	1			Company Car	MISC.MISC	1	Each	36706

Update 1099 Type on PO

Use <ctrl> F to find **1099 Type**

Set rendered to true for the column, Message Styled Text and Sortable Header components

Renderedfalsetrue

Note the document name is
/oracle/apps/po/document/order/webui/OrdersSummaryLinesPG

MainInfosemanticsInfosemantics Inc. T...SpringAhead LoginThe1099 Type1/22.9Other bookma

ORACLE Purchasing

RequisitionsInitiativesNegotiationsOrdersAgreementsDeliverablesSuppliersNotesAwardsIDVs

Personalize Page: Orders

Return to ApplicationChoose ContextManage LevelsModel PersonalizationPersonalization Workbench

Personalization Context

ScopePage: OrdersDocument Name/oracle/apps/po/document/order/webui/OrdersSummaryLinesPGSiteIncludeOrganizationVision OperationsResponsibilityPurchasing, Vision Operations (USA)

Search

StyleTitle/Prompt/TextInclude Personalized Items OnlyGo

Personalization Structure

Simple ViewComplete View

Expand All | Collapse All

Page Layout: Orders > Sub Tab Layout: (SubTabRN) > Stack Layout: (LinesSummaryRN) > Query: (LinesSummaryRN.LinesQueryRN) > Advanced Table: Purchase Order Li... >

Focus	Name	Shown	User Personalizable	Personalize	Reorder	Create Item	Update Item	Delete Item	Seeded User Views	Customize Look And Feel
	Column: (LinesSummaryRN.Type1999Col)	Yes	Yes							
	Message Styled Text: 1099 Type	Yes	Yes							
	Column Header									
	Sortable Header: 1099 Type	Yes	Yes							

- Order Summary Lines page is a view only page
- Now click **Go** to get to the lines detail page

RequisitionsInitiativesNegotiations**Orders**AgreementsDeliverablesSuppliersNotesAwardsIDVs

Personalize Page >

Orders

CreateStandard Purchase OrderGo

Indicates supplier is editing the document

Indicates a pending change request

Headers**Lines**SchedulesPay ItemsDistributions

New SearchShow Filters

Select Line: Update LineGoExport...

	Order ^	Supplier ^	Line ^	Item/Job	Rev	Description ^	Category	Qty ^	Unit	Price ^	Amount ^	Currency ^	Supplier Item ^	Status	1099 Type
<input checked="" type="radio"/>	6502	Staples	1	z7235		Weekly Warehousing	MISC.WARRANTY	17.6	Week	25000	440,000.00	USD		Open	AVAN/L
<input type="radio"/>	5896	Staples	1	z7235		Weekly Warehousing	MISC.WARRANTY	14	Week	25000	350,000.00	USD		Open	AVAN/L
<input type="radio"/>	5788	Staples	1	z7235		Weekly Warehousing	MISC.WARRANTY	15.6	Week	25000	390,000.00	USD		Open	AVAN/L
<input type="radio"/>	5481	Staples	1			Sharpie 30174 Permanent Marker Set of 4 (Red, Blue, Green, Black)	SUPPLIES.OFFICE	25	EA	3.19	79.75	USD	30174	Open	AVAN/L



This is the page where we want to update the 1099 Type on the PO Line

To see if the attribute is available on the page, at the bottom right of the page, click **About this Page**

- **FND_DIAGNOSTICS** profile option must be set to **Yes** to see this link
 - Set this only at a user level

The screenshot shows the 'Update Line 1 (Standard Purchase Order 6571)' page. The page has a navigation bar at the top with tabs: Requisitions, Initiatives, Negotiations, Orders, Agreements, Deliverables, Suppliers, Roles, Awards, IDVs. The 'Orders' tab is selected. Below the navigation bar, there is a header section with 'Update Line 1 (Standard Purchase Order 6571)' and buttons: Cancel, Actions, Add Another Line, Go, Apply. The main content area is divided into several sections: Operating Unit (Vision Operations), Currency (USD), * Indicates required field, * Line Type (Goods), * Category (MISC MISC), * Quantity (1), * Unit (Each), * Price (36705), Negotiated (No), Amount (36,705.00), Shipping, Delivery, Source Document, Contract, Attachments, and Notes. At the bottom right, there is a red box highlighting the 'About this Page' link.

- Click **Expand All** and click the links for the View Objects to see the available fields
- Scroll down to see the view objects on this page
- Click the link for the PoLinesMergeVO view object
- Confirm the attribute is part of the view object and note the name and click the Return to Page link

PoLinesMergeVO

Type1099 java.lang.String

Orders > Update Line >

About Page: Update Line 1 (Standard Purchase Order 6571)

Page

Personalization

Page Context

Technology Components

Java System Properties

Profiles

Patches

/oracle/apps/po/document/order/webui/OrderLineDetailsPG 120.76.12020000.17

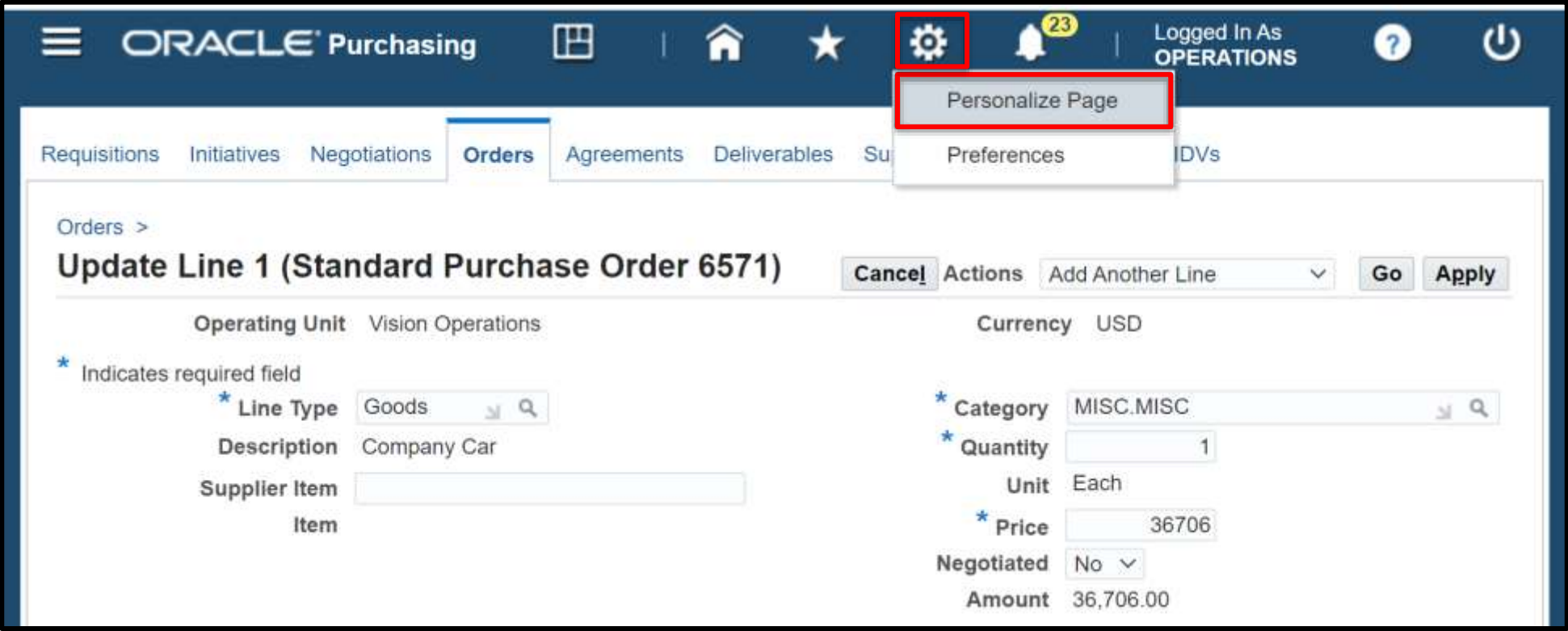
Page Definition

Expand All

Collapse All

Focus	Name	Controller	Application Module	View Object	View Attribute
	pageLayout: Create Line	OrderLineDetailsCO	DocumentAM		

Back on the Orders page, click the Gear icon, then **Personalize Page**



ORACLE Purchasing

Requisitions Initiatives Negotiations **Orders** Agreements Deliverables Suppliers

Orders > **Update Line 1 (Standard Purchase Order 6571)** Cancel Actions Add Another Line Go Apply

Operating Unit Vision Operations Currency USD

* Indicates required field

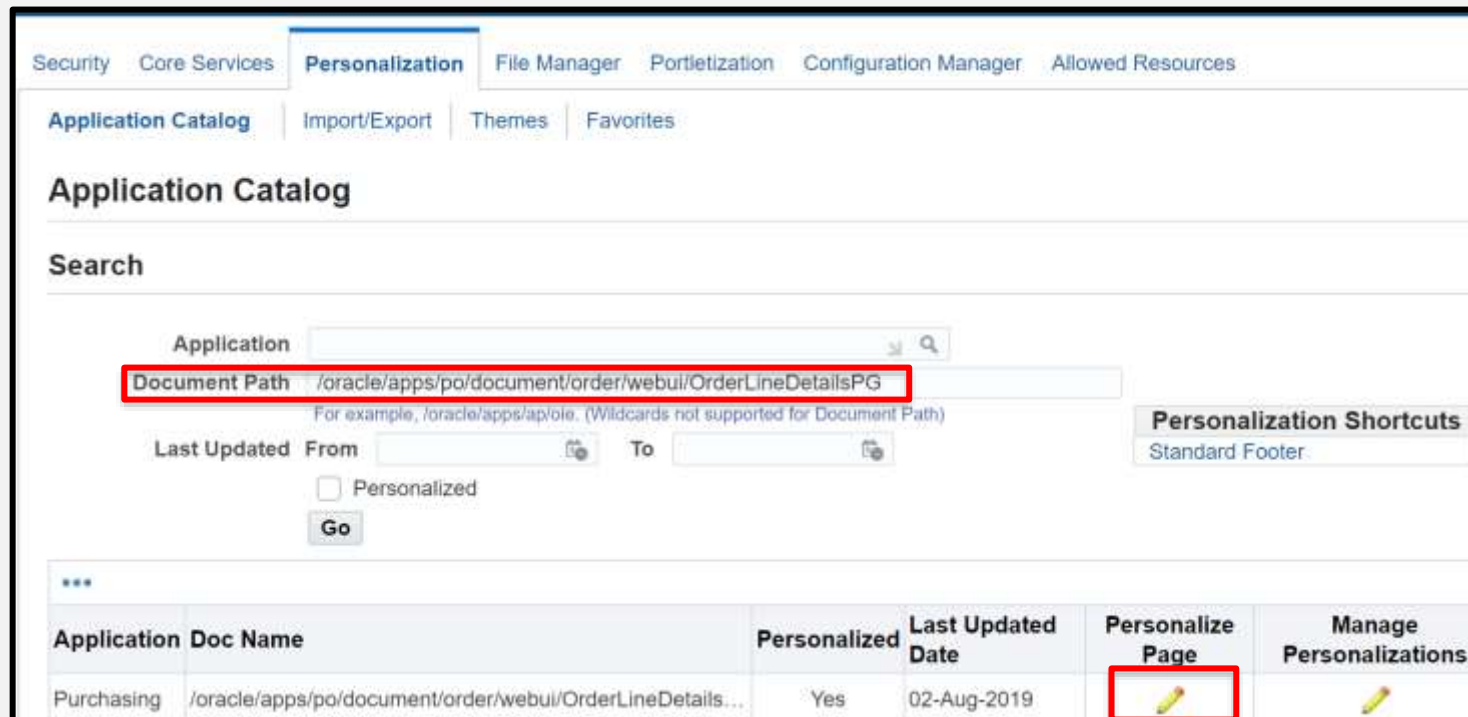
* Line Type	Goods	* Category	MISC.MISC
Description	Company Car	* Quantity	1
Supplier Item		Unit	Each
Item		* Price	36706
		Negotiated	No
		Amount	36,706.00

Optionally, navigate to Functional Administrator → Personalization

Enter the document path

- /oracle/apps/po/document/order/webui/OrderLineDetailsPG

Click the pencil to personalize the page



Security Core Services **Personalization** File Manager Portletization Configuration Manager Allowed Resources

Application Catalog Import/Export Themes Favorites

Application Catalog

Search



Application

Document Path
For example, /oracle/apps/ap/ole. (Wildcards not supported for Document Path)

Last Updated From To

☐ Personalized

Personalization Shortcuts
Standard Footer

Application	Doc Name	Personalized	Last Updated Date	Personalize Page	Manage Personalizations
Purchasing	/oracle/apps/po/document/order/webui/OrderLineDetails...	Yes	02-Aug-2019		

Choose the context and click **Apply**

- Most likely this should be done for a specific responsibility used by the Payables team
- For this example, I used Purchasing, Vision Operations (USA)

Security

Core Services

Personalization

File Manager

Portletization

Configuration Manager

Allowed Resources

Application Catalog

Import/Export

Themes











Favorites

Choose Personalization Context

Cancel

Apply

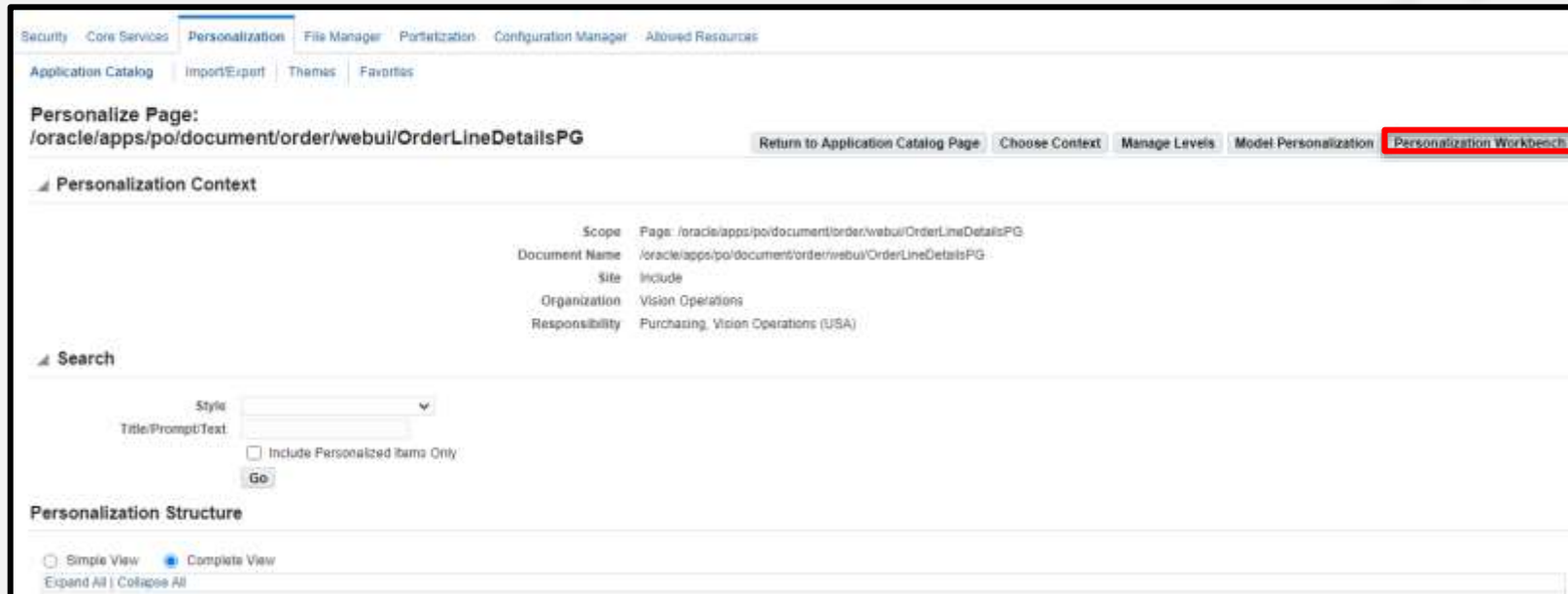
Choose the personalization context below by selecting a personalization value for each level.

Scope	Page: /oracle/apps/po/document/order/webui/OrderLineDetailsPG		
	Personalizations to Shared Regions will be applied to all pages where the region exists.		
Function	<input type="text"/>	 	Set to My Function
Industry	<input type="text"/>	 	Set to My Industry
Location	<input type="text"/>	 	Set to My Location
Site	<input checked="" type="checkbox"/> Include		
Organization	Vision Operations	 	Set to My Organization
Responsibility	Purchasing, Vision Operations (USA)	 	Set to My Responsibility

Other Options

1. For a function level personalization, enter PO Order Line Details Page as the function
2. For a site level personalization, leave the all fields blank except the scope and site checkbox

- | This personalization is much easier to complete in the workbench released in 12.2.7
- | I will show both the classic and workbench instructions starting with the workbench
- | Click **Personalization Workbench** from the Classic Personalization structure page
 - This new button is available starting appears in 12.2.9
 - In 12.2.7 and 12.2.8, set **FND: Enable Personalization Workbench** to Yes



The screenshot shows the Oracle Personalization Workbench interface. At the top, there are tabs for Security, Core Services, Personalization (selected), File Manager, Portletization, Configuration Manager, and Allowed Resources. Below these are sub-tabs for Application Catalog, Import/Export, Themes, and Favorites. The main heading is "Personalize Page:" followed by the page path "/oracle/apps/po/document/order/webui/OrderLineDetailsPG". To the right of this heading are buttons: "Return to Application Catalog Page", "Choose Context", "Manage Levels", "Model Personalization", and "Personalization Workbench" (which is highlighted with a red box). Below the heading is a section titled "Personalization Context" with a table of properties:

Scope	Page: /oracle/apps/po/document/order/webui/OrderLineDetailsPG
Document Name	/oracle/apps/po/document/order/webui/OrderLineDetailsPG
Site	Include
Organization	Vision Operations
Responsibility	Purchasing, Vision Operations (USA)

Below the context table is a "Search" section with a "Style" dropdown menu, a "Title/Prompt/Text" input field, a checkbox for "Include Personalized Items Only", and a "Go" button. At the bottom is a "Personalization Structure" section with radio buttons for "Simple View" and "Complete View" (which is selected), and a link to "Expand All | Collapse All".



Drag and drop the **Message Text Input** component into the region under supplier item

The Create Item property pallet will pop up

- Enter the fields highlighted and click **Create**

The screenshot displays the Oracle Workbench Personalization interface. On the left, the 'Personalize Page: Create Line' page is visible, showing a grid of components. The 'Message Text Input' component is highlighted with a red box. A red arrow points from this component to the 'Create Item' property pallet on the right. The 'Create Item' pallet shows the following properties for the 'Message Text Input' component:

Properties for Message Text Input	
* ID	xxis_1099type
Data Type	VARCHAR2
Destination Function	
Extends	
Prompt	1099 Type
Read Only	false
Rendered	true
Required	no
View Attribute	Type1099
View Instance	PoLinesMergeVO

At the bottom of the pallet, there are 'Cancel' and 'Create' buttons. The 'Create' button is highlighted with a red box.



Click the **Complete View** radio button and **Expand All**

Use <ctrl> F to find **Message Component Layout: (GeneralLeftRN)**

- Hint: Use <ctrl> F to find Supplier Item to get close to the right component and scroll up to find the correct layout section where the item should be created

Click the Create Item icon

The screenshot shows the Oracle Personalization Structure tool interface. At the top, there's a breadcrumb trail: Main > Infosemantics > Infosemantics Inc. T... > SpringAhead. Below this, a search bar is visible with a 'Go' button. The main section is titled 'Personalization Structure' and has two radio buttons: 'Simple View' and 'Complete View' (which is selected). Below the radio buttons are links for 'Expand All' and 'Collapse All'. A breadcrumb trail for the current selection is shown: Page Layout: Create Line > Row Layout: (GeneralRow) > Cell Format: (GeneralLeftCell) >. At the bottom, there's a table with columns: Focus, Name, Shown, User Personalizable, Personalize, Reorder, Create Item, and Update Item. The table contains one row with the name 'Message Component Layout: (GeneralLeftRN)' highlighted in orange. The 'Create Item' icon (a blue square with a white plus sign) in the 'Create Item' column is highlighted with a red box.

Focus	Name	Shown	User Personalizable	Personalize	Reorder	Create Item	Update Item
	Message Component Layout: (GeneralLeftRN)	Yes					

When the property pallet pops up, enter the following:

- ID: <Whatever you want – no spaces allowed>
- Prompt: 1099 Type
- View Attribute: Type1099
- View Instance: PoLinesMergeVO

Click **Create**, then **Return to Application**

Create Item

Properties for Message Text Input

* ID	xxis_1099Type
Data Type	VARCHAR2 ▾
Destination Function	
Extends	
Prompt	1099 Type
Read Only	false ▾
Rendered	true ▾
Required	no ▾
View Attribute	Type1099
View Instance	PoLinesMergeVO

Show More

Cancel Create

| The 1099 type can now be updated on the PO

Requisitions

Initiatives

Negotiations

Orders

Agreements

Deliverables

Suppliers

Notes

Awards

IDVs

Orders >

Update Line 1 (Complex Services (Actuals) PO 6567)

Cancel Actions Add Another Line Go Apply

Operating Unit

Vision Operations

Currency

USD

* Indicates required field

* Line Type

Fixed Price S

Description

Conference Room Remodel

Supplier Item

1099 Type

test

* Category

CONSTRUCT.SITE

* Price

10000

Negotiated

No

Buyers Work Center → Orders

- Select order and click **Go**, then click the **Lines** tab
- Users would also like to see 1099 type on this view which is a different page than the view going to the lines tab before selecting the order
 - **Limitation** – This is a Display only field - Cannot set up editable 1099 Type field on this page because it's not in the change record view object editing will be available by clicking the update pencil (with subsequent personalization)
- Click the **Personalize Purchase Order Lines Table** region link

Update Standard Purchase Order 6576

Cancel Actions Add Contract Terms Go Save Approval Options Submit

Indicates required field

Search

Header Lines Schedules Distributions

Personalize Stack Layout
Personalize Stack Layout
Personalize Flow Layout: (OULayout)
Operating Unit Vision Operations
Personalize Flow Layout: (AuthorizationStatusLayout)
Status Incomplete
Personalize Flow Layout: (DocTotalFlowLayout)
Total 945.00 USD

Personalize "Purchase Order Lines Table"

Add Lines: From Catalog Go Update with Excel

*Line	*Type	Item/Job	*Description	*Category	Qty	Unit	Price	Amount	Need-By/Start Date	Actions
1	Goods		Roller Ball Pen, Fine	SUPPLIES	100	EA	1.05	105.00		  

Click the Create item icon for the Advanced Table: Purchase Order Lines

The document name we will personalize now is:

`/oracle/apps/po/document/order/webui/OrdersLinesRN`

- The lines page personalized previously was

`/oracle/apps/po/document/order/webui/OrdersSummaryLinesPG`

Many pages that look “almost” the same can be confusing!

Scope

Region: Purchase Order Lines Table

Document Name

`/oracle/apps/po/document/order/webui/OrderLinesRN`

Function

PO Order Main Page

Site

Include

Organization

Vision Operations

Responsibility

Purchasing Super User

Search

Personalization Structure

Simple View

Complete View

Expand All

Collapse All

Focus	Name	Shown	User Personalizable	Personalize	Reorder	Create Item	Update
	Advanced Table: Purchase Order Li...	Yes					

- | If region links are not turned on, click the Personalize Page link, Click **Choose Context**, then Search for the style **Advanced Table**
- | On this page, the column does not exist at all even though the data is available, so we need to do a little more work starting with creating the column
- | Click the Create item icon for the Advanced Table: Purchase Order Lines

Requisitions Initiatives Negotiations Orders Agreements Deliverables Suppliers Notes Awards IDVs

Personalize Region: /oracle/apps/po/document/order/webui/OrderLinesRN Return to Application Choose Context Manage Levels Personalization Workbench

Personalization Context

Scope: /oracle/apps/po/document/order/webui/OrderLinesRN

Document Name: /oracle/apps/po/document/order/webui/OrderLinesRN

Function: PO Order Main Page

Site: Include

Organization: Vision Operations

Responsibility: Purchasing Super User

Search

Style: Advanced Table

Title/Prompt/Text

☐ Include Personalized Items Only

Go

Name	Parent	Shown	User Personalizable	Personalize	Reorder	Create Item	Update Item	Delete Item	Seeded User Views	Customize Look And Feel	View in Hierarchy
Advanced Table: Purchase Order LI...	Stack Layout	Yes									



Create an empty column

- Item Style: Column
- ID: Enter and ID without spaces

Create ItemCancelApply

* Indicates required field






Level Function: PO Order Main Page

Item Style Column

...

Property	Value
* ID	XXIS TYPE1099
Admin Personalization	true
Alignment	textFormat
Attribute Set	
Banding Shade	none
Comments	
Extends	
Grid Displayed	true
No Wrap	false
Rendered	true
Scope	.
Total Value	false
User Personalization	false
Width	

Click the Create Item icon on the column created

	Column: (XXIS_TYPE1099)	Yes				
	columnHeader					

Create the Message Styled Text as shown here and click **Apply**

Create Item

* Indicates required field

Level: Function: PO Order Main Page

Item Style: Message Styled Text

Property	Value
* ID	XXIS_1099TYPE_MST
Access Key	

Vertical Alignment: middle

View Attribute: Type1099

View Instance: PoHeaderMergeVO

Warn About Changes: true







Width:

Table Diagnostics

D diagnostic Console

Cancel Apply

Click the Create Item icon on the columnHeader row

	Column: (XXIS_TYPE1099)	Yes				
	columnHeader					

- Create this item as Item Style = Sortable Header and enter an id
- Click **Apply**
- Click **Return to Application**

Create Item

Cancel

Apply

* Indicates required field

Level: Function: PO Order Main Page

Item Style: Sortable Header

Property	Value
ID	XXIS_1099_HDR
Abbreviation	
Additional Text	
Admin Personalization	true

Personalize Region: Purchase Order Lines Table

Return to Application

Personalization Context

Scope	Region: Purchase Order Lines Table
Document Name	/oracle/apps/po/document/order/webui/OrderLinesRN
Function	PO Order Main Page
Site	Include
Organization	Vision Operations
Responsibility	Purchasing Super User










Add 1099 Type to Lines View via Order Header

- Result with new column is shown below
- Clicking the pencil to edit a line will navigate to the next page where I will show you how to create the field with an LOV to enter the 1099 Type

Header Lines Schedules Distributions

Operating Unit Vision Operations Status Approved Total 945.00 USD

Add Lines: From Catalog Go Update with Excel

*Line	*Type	Item/Job	*Description	*Category	Qty	Unit	Price	Amount	Need-By/Start Date	Actions	1099 Type
1	Goods		Roller Ball Pen, Fine	SUPPLIES.C	100	EA	1.05	105.00		  	AVAN/A
2	Goods		Stop-Step 2-Step	MAINTENAN	2	EA	350	700.00		  	
3	Goods	BUSCARDS	Business Cards, Box	SUPPLIES.OFFICE	4	BOX	35	140.00		  	



Add 1099 Type Field with LOV



Reduce work, Improve Quality, Improve Data accuracy and reduce audit costs

PAYER'S name, street address, city or town, state or province, country, ZIP
or foreign postal code, and telephone no.

1099

PAYER'S federal identification number

RECIPIENT'S identification number

RECIPIENT'S name

☐ CORRECTED (if checked)

1 Rents
\$

2 Royalties
\$

3 Other income
\$

5 Fishing boat proceeds
\$

7 Nonemployee compensation
\$

8 Payer made direct sales of \$5,000 or more of consumer products to a buyer (recipient) for resale

OMB No. 1545-0047
2010
Form 1099-INT
4 Federal
\$
6 Med

Add 1099 Type Field with LOV



To add functionality and complexity to the previous example, we will now create this as a field with an LOV

We already have the view object/view attribute from the earlier example

We also need to gather the LOV details

- Click on the flashlight for the Income Tax Type on the Suppliers Tax Details page
 - The 1099 type is also known as Income Tax Type
 - Click the flashlight to go to the LOV

The screenshot shows the Oracle Suppliers Tax Details page. On the left sidebar, the 'Suppliers' menu item is highlighted with a red box. Below it, the 'Tax Details' menu item is also highlighted with a red box. The main content area is titled 'Update Dell Computers - 5092: Tax Details' and 'Income Tax'. It contains fields for 'Taxpayer ID', 'Reportable' (with a checked 'Federal' checkbox), and 'Income Tax Type' (with the value 'AVAN/A'). A red arrow points to a search icon (magnifying glass) at the end of the 'Income Tax Type' field, which is also highlighted with a red box. To the right of the 'Income Tax Type' field is a checkbox labeled 'Allow Withholding Tax'.

When the LOV opens up, click **About this page**

Search and Select: Income Tax Type

Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.


Search By

Income Tax Type

AVAN/A

Go

Results

Select	Quick Select	Income Tax Type	Description
<input type="radio"/>		AVAN/A	Fringe Benefits - other

About this Page

Cancel

Select

The name of this page,
`/oracle/apps/pos/supplier/webui/ByrTaxDtPG.region22` is the name of the external LOV that will be used in the personalization

Click the **Expand All** link

Income Tax Type and **Description**, will be used in the personalization

Personalize Page > Update Dell Computers - 5092: Tax Details >

About Page: previous Page

[Printable Page](#) [Generate Bug Report](#)

[Page](#) [Personalization](#) [Page Context](#) [Technology Components](#) [Java System Properties](#) [Profiles](#) [Patches](#)

`/oracle/apps/pos/supplier/webui/ByrTaxDtPG.region22`

Page Definition

[Expand All](#) [Collapse All](#)

Focus	Name	Controller	Application Module	View Object	View Attribute
	listOfValues: Income Tax Type		AllLovAM		
	styledText: (lovResultHeader)				
	table: Results: Income Tax Type			TaxTypeVO	
	lovSelectColumn: Quick Select			TaxTypeVO	
	messageStyledText: Income Tax Type			TaxTypeVO	IncomeTaxType
	messageStyledText: Description			TaxTypeVO	Description

Add 1099 Type Field with LOV



Navigate to the update order lines page as shown in the previous example

Click the **Gear** icon, then **Personalize Page**

The screenshot shows the Oracle Purchasing interface. At the top, the header includes the Oracle Purchasing logo, navigation icons, and a user profile section showing 'Logged In As OPERATIONS'. A gear icon in the top navigation bar has a red box around it, and a dropdown menu is open, highlighting the 'Personalize Page' option. Below the header, the 'Orders' tab is selected in the main navigation bar. The main content area is titled 'Update Line 1 (Standard Purchase Order 6571)'. It includes a 'Cancel' button, an 'Actions' dropdown menu with 'Add Another Line' selected, and 'Go' and 'Apply' buttons. The form displays details for the operating unit 'Vision Operations' and currency 'USD'. It includes fields for 'Line Type' (Goods), 'Description' (Company Car), 'Supplier Item', 'Category' (MISC.MISC), 'Quantity' (1), 'Unit' (Each), 'Price' (36706), 'Negotiated' (No), and 'Amount' (36,706.00). A legend indicates that an asterisk (*) denotes a required field.

Add 1099 Type Field with LOV



Note: LOV personalizations are not available in the personalization workbench so make sure you are in the classic view

Click the **Complete View** radio button

Use <ctrl> F to find **Message Component Layout: (GeneralLeftRN)**

Click the Create Item icon

Message Component Layout 1/2

Scope Page: /oracle/apps/po/document/order/webui/OrderLineDetailsPG
Document Name /oracle/apps/po/document/order/webui/OrderLineDetailsPG
Site Include

Search

Style
Title/Prompt/Text
☐ Include Personalized Items Only
Go

Personalization Structure

☐ Simple View ☒ Complete View
Expand All | Collapse All

Page Layout: Create Line > Row Layout: (GeneralRow) > Cell Format: (GeneralLeftCell) >

Focus Name	Shown	User Personalizable	Personalize	Reorder	Create Item	Update Item
Message Component Layout: (GeneralLeftRN)	Yes					

Add 1099 Type Field with LOV



When the property pallet pops up, select **Message Lov Input** as the Item Style, then enter:

- ID: Anything without spaces
- External View Object:
/oracle/apps/pos/supplier/webui/ByrTaxDtPG.region22
- Prompt: 1099 Type
- View Attribute: Type1099
- View Instance: PoLinesMergeVO

Click **Apply**

Create Item Cancel Apply

* Indicates required field

Level Function: PO Order Line Details Page

Item Style Message Lov Input

...

Property	Value
* ID	XXIS_1099TYPE
Access Key	

scroll down

Export View Attribute	
External LOV	/oracle/apps/pos/supplier/webui/ByrTaxDtPG.region22
Height	1

scroll down


Prompt	
1099 Type	

scroll down

View Attribute	
Type1099	
View Instance	
PoLinesMergeVO	

Add 1099 Type Field with LOV

The warning below will appear noting that the mapping is required for the LOV

 **Warning**
Attachment item "%ITEM" has been created successfully, however, it does not have an Entity Map associated with it. To avoid a runtime error, please either create an Entity Map for this attachment item, or delete attachment item "%ITEM".

Create lovMappings by clicking the create item button on the lovMappings row which is under the Message LOV Input row just created

	 Message Lov Input: 1099 Type	Yes					
	lovMappings						

Add 1099 Type Field with LOV



When the property pallet pops up, enter the following:

- ID: Anything without spaces
- Criteria Item: XXIS_1099TYPE
 - This is the ID of the Message LOV Input item just created
- LOV Region Item: IncomeTaxType
- Return Item: XXIS_1099TYPE
 - Same as criteria item

Click **Apply**, then **Return to Application**

Consider clearing java cache in the Functional Administrator responsibility if there are issues

Create Item Cancel Apply

* Indicates required field

Level: Function: PO Order Line Details Page ▾
Item Style: Lov Map ▾

Property	Value
* ID	XXIS_1099TYPE_LOVMAP
Attribute Set	
Comments	
Criteria Item	XXIS_1099TYPE
Extends	
* LOV Region Item	IncomeTaxType
Programmatic Query	false ▾
Required	false ▾
Return Item	XXIS_1099TYPE
Scope	.
Use for Validation	yes ▾

Add 1099 Type Field with LOV

Now the 1099 type field has a working LOV

Personalize Page >

Update Line 1 (Standard Purchase Order 6571)

Cancel Actions Add Another Line Go Apply

Operating Unit Vision Operations

Currency USD

* Indicates required field

* Line Type Goods

Item

Description Company Car

Supplier Item

1099 Type AVAN/V

Search: 1099 Type

* Category MISC.MISC

* Quantity 1

Unit Each

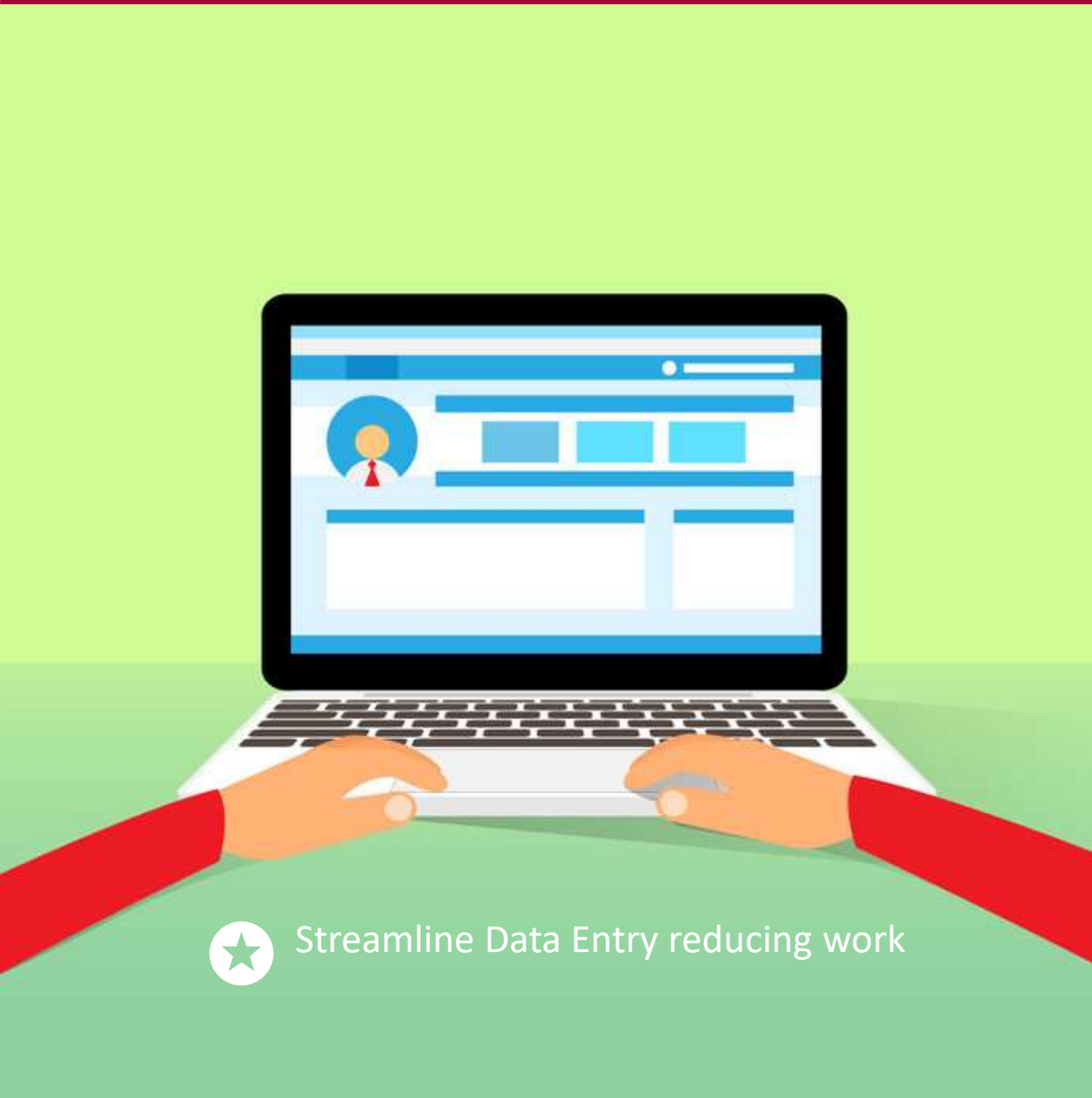
* Price 36706

Negotiated No

Amount 36,706.00

ORACLE

Partner 68

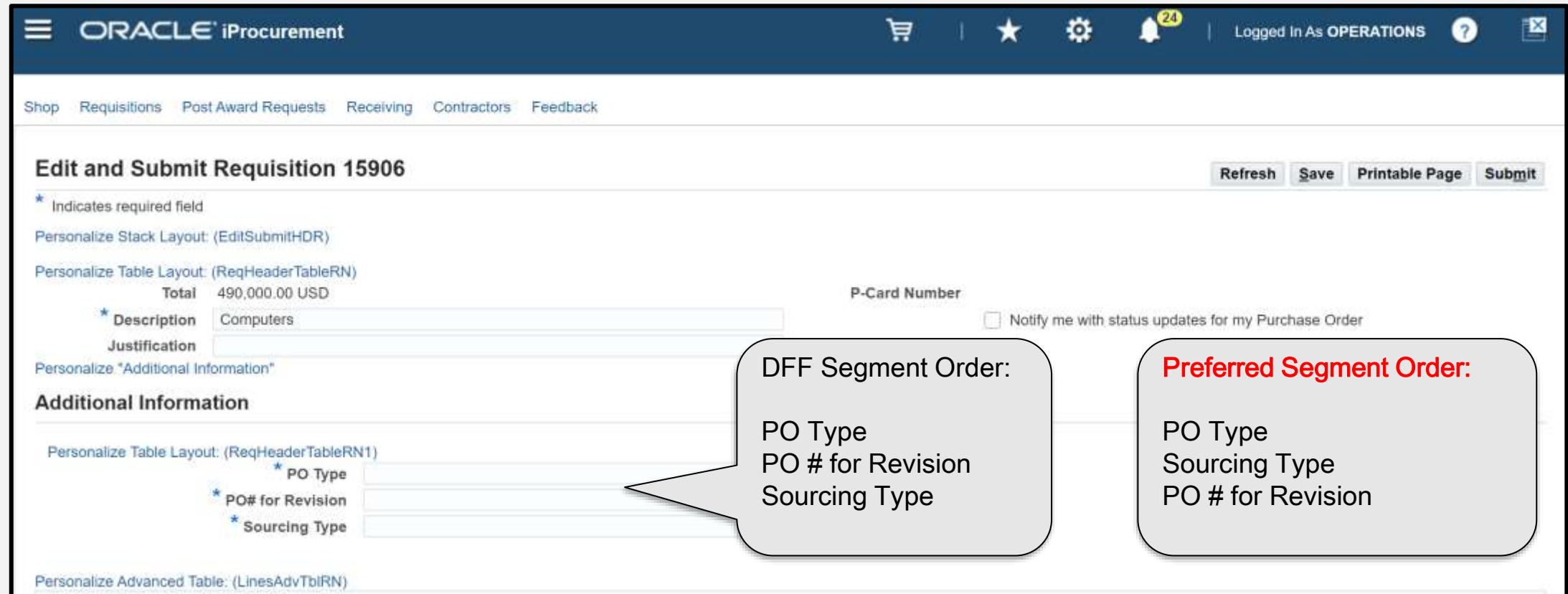


Streamline Data Entry reducing work

Change order of Descriptive Flexfields (DFFs)

Default DFF segment order is shown below

User would like to change to the Preferred Segment Order



Edit and Submit Requisition 15906

Refresh Save Printable Page Submit

* Indicates required field

Personalize Stack Layout: (EditSubmitHDR)

Personalize Table Layout: (ReqHeaderTableRN)

Total 490,000.00 USD

Description Computers

Justification

Personalize *Additional Information

Additional Information

Personalize Table Layout: (ReqHeaderTableRN1)

* PO Type

* PO# for Revision

* Sourcing Type

Personalize Advanced Table: (LinesAdvTblRN)

P-Card Number

☐ Notify me with status updates for my Purchase Order

DFF Segment Order:

- PO Type
- PO # for Revision
- Sourcing Type

Preferred Segment Order:

- PO Type
- Sourcing Type
- PO # for Revision

DFF Segments are shown here for reference

Segments Summary (Requisition Headers) - Global Data Elements

	Number	Name	Window Prompt	Column	Value Set	Displayed	Enabled	Updatable	Insertable
<input type="checkbox"/>	10	PO_TYPE	PO Type	ATTRIBUTE4		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	20	PONUM_REV	PO# for Revision	ATTRIBUTE6		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	30	SOURCING_TYPE	Sourcing Type	ATTRIBUTE7		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<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"/>	<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"/>	<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"/>	<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"/>						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Value Set

New

Open

If you have region links displayed, click the region link to personalize **ReqHeaderTableRN1**, otherwise, click the **Personalized Page** link

ORACLE iProcurement

24

Logged In As OPERATIONS

Shop

Requisitions

Post Award Requests

Receiving

Contractors

Feedback

Personalize Page

Preferences

Personalize Page >

Refresh

Save

Printable Page

Submit

Indicates required field

Personalize Stack Layout: (EditSubmitHDR)

Personalize Table Layout: (ReqHeaderTableRN)

Total490,000.00 USD

DescriptionComputers

Justification

Personalize "Additional Information"

Additional Information

Personalize Table Layout: (ReqHeaderTableRN1)

PO Type

PO# for Revision

Sourcing Type

P-Card Number

☐ Notify me with status updates for my Purchase Order

- Click **Complete view**, then **Expand All**
- Use <ctrl> F to find **Flex: (ReqHeaderDDF)** and click the pencil to edit

Personalization Structure

☐ Simple View ☒ Complete View

Expand All

Collapse All

Focus	Name	Shown	User Personalizable	Personalize	Reorder	Create Item	
	Table Layout: (ReqHeaderTableRN1)	Yes					
	Row Layout: (ReqHeaderRow1)	Yes					
	Cell Format: (ReqHeaderCell11)	Yes					
	Labeled Field Layout: (HeaderColumnsRNLeft1)	Yes					
	Flex: (ReqHeaderDDF)	Yes					

- | Look for the Segment List Property
- | At the preferred personalization level, such as site or responsibility, enter a string in the format: **Context Field Value Code|Segment Name|Segment Name Segment Name|...**
- | For this example: **Global Data Elements|PO_TYPE|SOURCING_TYPE|PONUM_REV**
- | Click **Apply**

Personalize Flex : (ReqHeaderDFF)

CancelApply

Personalization Context

Scope

Region: /oracle/apps/icx/por/req/webui/EditSubmitPG.ReqHeaderTableRN1

Document Name

/oracle/apps/icx/por/req/webui/EditSubmitPG

Site

Include

Organization

Vision Operations

Responsibility

iProcurement

Personalization Properties

Clear Personalization

Go

Choose Levels Displayed

	Original Definition	Site	Organization: Vision Operations	Responsibility: iProcurement	Result / Source
Additional Text	Default	Inherit	Inherit	Inherit	Default / Original Definition
Admin Personalization	true	Inherit	Inherit	Inherit	true / Original Definition
CSS Class	Default	Inherit	Inherit	Inherit	Default / Original Definition
Case Sensitive Search for LookAhead LOV	Default	Inherit	Inherit	Inherit	Default / Original Definition
Prompt	Default	Inherit	Inherit	Inherit	Default / Original Definition
Read Only	false	Inherit	Inherit	Inherit	false / Original Definition
Render as Popup	false	Inherit	Inherit	Inherit	false / Original Definition
Rendered	true	Inherit	Inherit	Inherit	true / Original Definition
Segment List	Show	Global Data Elements PO_	Inherit	Inherit	Show

Click **Return to Application**

[Shop](#) [Requisitions](#) [Post Award Requests](#) [Receiving](#) [Contractors](#) [Feedback](#)

Personalize Region:
`/oracle/apps/icx/por/req/webui/EditSubmitPG.RegHeaderTableRN1`

[Return to Application](#) [Choose Context](#) [Manage Levels](#) [Model Personalization](#)

Personalization Context

Scope	Region: /oracle/apps/icx/por/req/webui/EditSubmitPG.RegHeaderTableRN1
Document Name	/oracle/apps/icx/por/req/webui/EditSubmitPG
Site	Include
Organization	Vision Operations
Responsibility	iProcurement

Search

Style

Title/Prompt/Text

☐ Include Personalized Items Only

| End Result – order of DFFs has changed

Edit and Submit Requisition 15906

* Indicates required field

Personalize Stack Layout: (EditSubmitHDR)

Personalize Table Layout: (ReqHeaderTableRN)

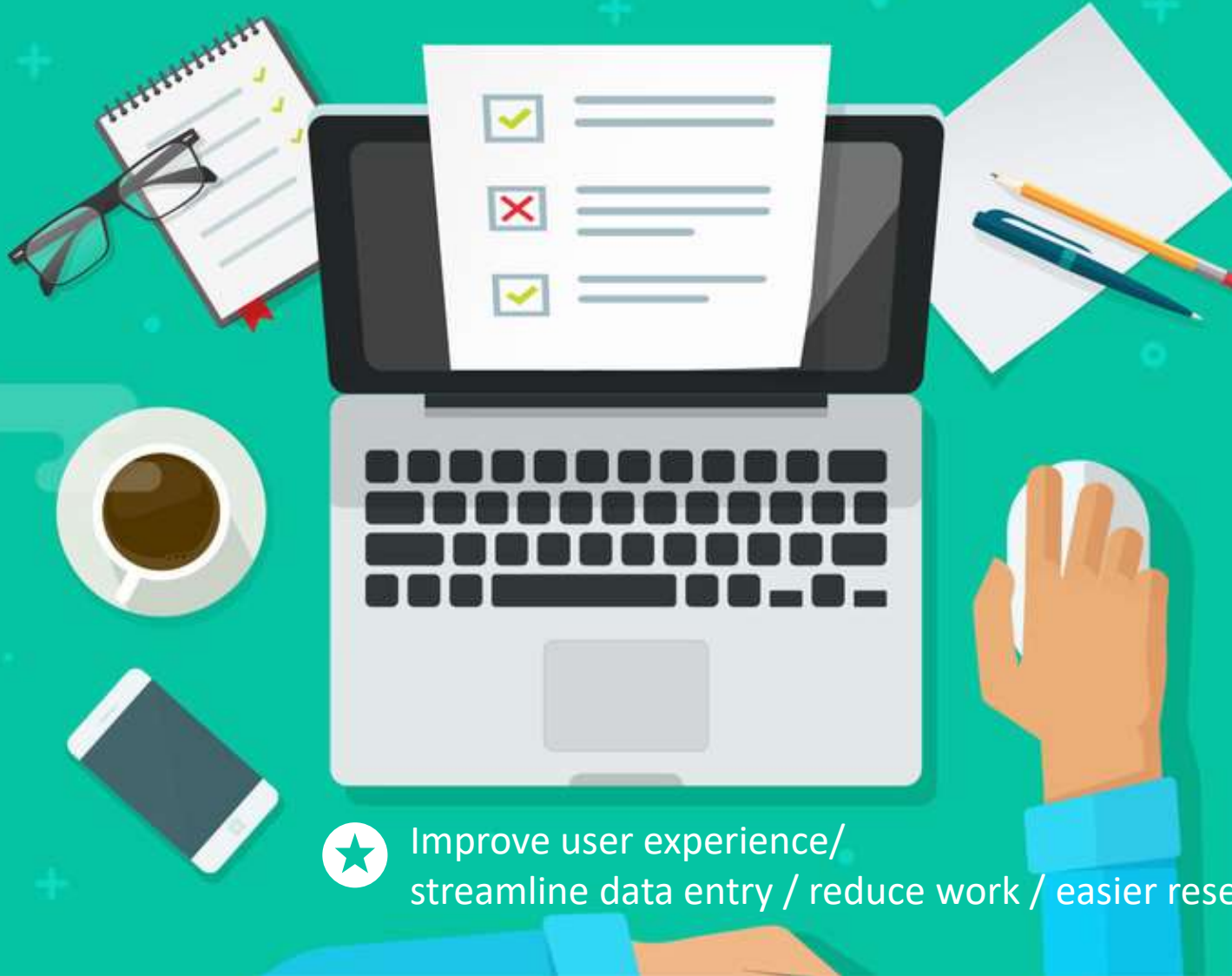
Total	490,000.00 USD	P-Card Number
* Description	<input type="text" value="Computers"/>	
Justification	<input type="text"/>	

Personalize "Additional Information"

Additional Information

Personalize Table Layout: (ReqHeaderTableRN1)

* PO Type	<input type="text"/>
* Sourcing Type	<input type="text"/>
* PO# for Revision	<input type="text"/>



Subledger Journal Entry Lines – Add Fields to View using Personalization



Improve user experience/
streamline data entry / reduce work / easier research



Payables and Receivables Subledger Journal Entry Lines examples

- IT Support Team - Personalize View via Personalize Page link – must have access (12.2+)
 - **Modify view by responsibility (similar to folder tools)**
 - Payables and Receivables need to see different columns for example
- End User - Save Searches without using personalization (12.2+)
 - **End user applies their own search criteria and column updates**
 - **Does not require access to the Personalize Page Link**
- IT Support Team - Saved Search using personalization (12.2+)
 - **Create saved search with modified columns as needed via Personalize Page link – must have access**
 - **Standardizes common view so end users can easily duplicate any only update search criteria**



Receivables → Inquiry → Subledger Accounting → Journal Entry Lines

Subledger Journal Entries

Accounting Events

Supporting Reference Balances

Headers

Lines

Subledger Journal Entry Lines

Save Search

Advanced Search

Specify parameters and values to filter the data that is displayed in your results set.

Match ☐ All ☒ Any

Ledger

is

Vision Operations (USA)

Balancing Segment

is

Natural Account Segment

is

4130

GL Date

is

14-Sep-2001

Go

Clear

Add Another

Accounted CR

Add

Select Subledger Journal Entry Line:

View Transaction

View Journal Entry

Export

Rows 1 to 30

	Ledger	Account	AccountDescription	GL Date	Accounting Class	Accounted DR	Accounted CR	Customer Name	Supplier Name	Transaction Number
<input checked="" type="radio"/>	Vision Operations (USA)	01-740-7810-0000-000	Operations-Controllers Office-Interest Income-No Sub Account-No Product	20-Oct-2004	Finance Charges		1,000.00	Computer Service and Rentals		2906
<input type="radio"/>	Vision Operations (USA)	01-000-1210-0000-000	Operations-No Department-Accounts Receivable \- Bil-No Sub Account-No Product	20-Oct-2004	Receivable	1,000.00		Computer Service and Rentals		2906
<input type="radio"/>	Vision Operations (USA)	01-740-7730-0000-000	Operations-Controllers Office-Bad Debt-No Sub Account-No Product	09-Jun-2004	Adjustment	0.01		Sunshine ElectroCity		2747
<input type="radio"/>	Vision Operations (USA)	01-000-1210-0000-000	Operations-No Department-Accounts Receivable \- Bil-No Sub Account-No Product	09-Jun-2004	Receivable		0.01	Sunshine ElectroCity		2747

Don't need
Supplier name in
Receivables



Click the gear then **Personalize Page**

Search for the Style = **Table**, then click the icon to View in Hierarchy

Subledger Journal Entries Accounting Events Supporting Reference Balances

Headers Lines

Personalize Page: Subledger Journal Entry Lines

[Return to Application](#) [Choose Context](#) [Manage Levels](#) [Model Personalization](#)

Personalization Context

Scope	Page: Subledger Journal Entry Lines
Document Name	/oracle/apps/xdalinesinquiry/webui/JelLinesInquiriesPG
Site	Include
Organization	Vision Operations
Responsibility	Receivables, Vision Operations (USA)

Search

Style **Table** ▼

Title/Prompt/Text

☐ Include Personalized Items Only

[Go](#)

Name	Parent	Shown	User Personalizable	Personalize	Reorder	Create Item	Update Item	Delete Item	Seeded User Views	Customize Look And Feel	View in Hierarchy
Table: Journal Entry Lin...	Flow Layout	Yes	Yes								

[Return to Personalization Structure](#)

View in
Hierarchy

Click the arrow to expand the table

Page Layout: Subledger Journal Entry Lines > Query: (QueryRN) > Flow Layout: (QueryResultRN) >

Focus	Name	Shown	User Personalizable	Personalize	Reorder	Create Item	U
	▶ Table: Journal Entry Lin...	Yes	Yes				

This is a partial view of fields available in the table

- Click the pencil and set rendered to true or false as needed

Name	Shown	User Personalizable	Personalize
▶ Table: Journal Entry Lin...	Yes	Yes	
Message Styled Text: Ledger	Yes	Yes	
Message Styled Text: Account	Yes	Yes	
Message Styled Text: AccountDescription	Yes	Yes	
Message Styled Text: GL Date	Yes	Yes	
Message Styled Text: Accounting Class	Yes	Yes	
Message Styled Text: Accounted DR	Yes	Yes	
Message Styled Text: Accounted CR	Yes	Yes	
Message Styled Text: Entered Currency		Yes	
Message Styled Text: Entered DR		Yes	
Message Styled Text: Entered CR		Yes	
Message Styled Text: Accounting Sequence Name		Yes	
Message Styled Text: Accounting Sequence Number		Yes	

Message Styled Text: Batch		Yes	
Message Styled Text: Budget		Yes	
Message Styled Text: Category		Yes	
Message Styled Text: Completion Date		Yes	
Message Styled Text: Created By		Yes	
Message Styled Text: Creation Date		Yes	
Message Styled Text: Document Sequence Name		Yes	
Message Styled Text: Document Sequence Number		Yes	
Message Styled Text: Conversion Date		Yes	
Message Styled Text: Conversion Rate		Yes	
Message Styled Text: Conversion Type		Yes	
Message Styled Text: Customer Name	Yes	Yes	
Message Styled Text: Customer Number		Yes	
Message Styled Text: Customer Site Name		Yes	

Set rendered to true at the responsibility level

Organization: Vision Operations
 Responsibility: Receivables Manager

Personalization Properties

Clear Personalization

	Original Definition	Site	Organization: Vision Operations	Responsibility: Receivables Manager	Result / Source
Access Key	Default	Inherit	Inherit	Inherit	Default / Original Definition
Additional Text	Default	Inherit	Inherit	Inherit	Default / Original Definition
Admin Personalization	true	Inherit	Inherit	Inherit	true / Original Definition
CSS Class	OraTableCellText	Inherit	Inherit	Inherit	OraTableCellText / Original Definition
Destination Function	Default	Inherit	Inherit	Inherit	Default / Original Definition
Destination URI	Default	Inherit	Inherit	Inherit	Default / Original Definition
Export View Attribute	Default	Inherit	Inherit	Inherit	Default / Original Definition
Inline CSS Style	Default	Inherit	Inherit	Inherit	Default / Original Definition
Long Tip Region	Default	Inherit	Inherit	Inherit	Default / Original Definition
Maximum Length	Default	Inherit	Inherit	Inherit	Default / Original Definition
Popup Enabled	false	Inherit	Inherit	Inherit	false / Original Definition
Popup ID	Default	Inherit	Inherit	Inherit	Default / Original Definition
Popup Render Event	onClick	Inherit	Inherit	<div style="border: 1px solid red; padding: 2px;">true</div>	onClick / Original Definition
Prompt	Customer Site Name	Inherit	Inherit	<div style="border: 1px solid red; padding: 2px;">false</div>	Customer Site Name / Original Definition
Rendered	false	Inherit	Inherit	<div style="border: 1px solid red; padding: 2px;">true</div>	false / Original Definition

Receivables Subledger Journal Entry Lines



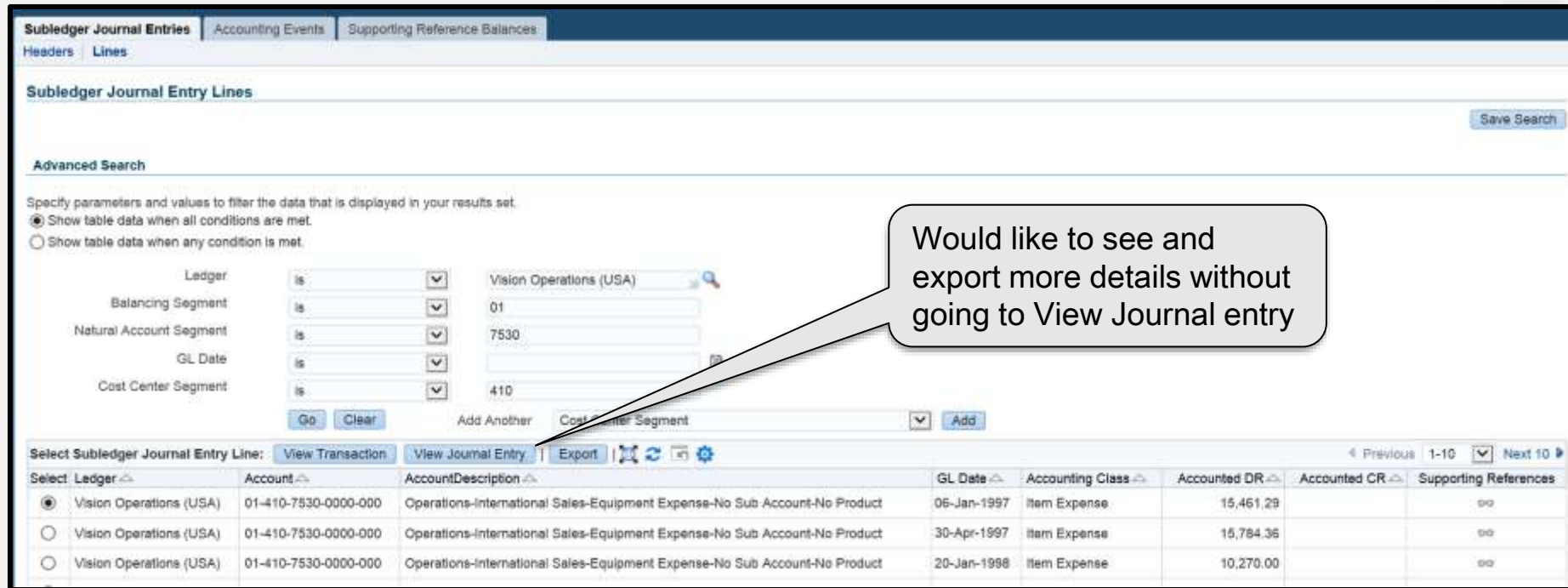
The following changes were made at the Responsibility Level

- Removed Supplier Name
- Added Customer Site Name

Select Subledger Journal Entry Line: View Transaction View Journal Entry Export										Rows 1 to 30	
	Ledger	Account	AccountDescription	GL Date	Accounting Class	Accounted DR	Accounted CR	Customer Site Name	Transaction Number		
<input type="radio"/>	Vision Operations (USA)	01-740-7810-0000-000	Operations-Controllers Office-Interest Income-No Sub Account-No Product	20-Oct-2004	Finance Charges		1,000.00	4292	2906		
<input type="radio"/>	Vision Operations (USA)	01-000-1210-0000-000	Operations-No Department-Accounts Receivable \- Bil-No Sub Account-No Product	20-Oct-2004	Receivable	1,000.00		4292	2906		
<input type="radio"/>	Vision Operations (USA)	01-740-7730-0000-000	Operations-Controllers Office-Bad Debt-No Sub Account-No Product	09-Jun-2004	Adjustment	0.01		17317	2747		
<input type="radio"/>	Vision Operations (USA)	01-000-1210-0000-000	Operations-No Department-Accounts Receivable \- Bil-No Sub Account-No Product	09-Jun-2004	Receivable		0.01	17317	2747		
<input type="radio"/>	Vision Operations (USA)	01-000-1220-0000-000	Operations-No Department-Other Receivables-No Sub Account-No Product	12-Aug-2004	Adjustment	2.00		3990	2810		

Account analysis page in Payables –

- Payables→Subledger Accounting→Journal Entry Lines
- View and export would be nicer if it included transaction number, customer and supplier



Subledger Journal Entries | Accounting Events | Supporting Reference Balances

Headers | Lines

Subledger Journal Entry Lines [Save Search](#)

Advanced Search

Specify parameters and values to filter the data that is displayed in your results set.

☒ Show table data when all conditions are met.
☐ Show table data when any condition is met.

Ledger is [Search](#)

Balancing Segment is

Natural Account Segment is

GL Date is

Cost Center Segment is

[Go](#) [Clear](#) [Add Another](#) [Cost Center Segment](#) [Add](#)

Select Subledger Journal Entry Line: [View Transaction](#) [View Journal Entry](#) [Export](#) [Print](#) [Refresh](#) [Settings](#)

Select	Ledger	Account	AccountDescription	GL Date	Accounting Class	Accounted DR	Accounted CR	Supporting References
<input checked="" type="radio"/>	Vision Operations (USA)	01-410-7530-0000-000	Operations-International Sales-Equipment Expense-No Sub Account-No Product	06-Jan-1997	Item Expense	15,461.29		View
<input type="radio"/>	Vision Operations (USA)	01-410-7530-0000-000	Operations-International Sales-Equipment Expense-No Sub Account-No Product	30-Apr-1997	Item Expense	15,784.36		View
<input type="radio"/>	Vision Operations (USA)	01-410-7530-0000-000	Operations-International Sales-Equipment Expense-No Sub Account-No Product	20-Jan-1998	Item Expense	10,270.00		View



Follow the same process setting rendered to true to display supplier name, supplier site name and transaction number

Subledger Journal Entries | Accounting Events | Supporting Reference Balances

Headers | Lines

Subledger Journal Entry Lines

Views

Saved Search | Susan's Test View | Go | Personalize

Select Subledger Journal Entry Line: | View Transaction | View Journal Entry | Export | ...

Rows 1 to 30

Ledger	Account	AccountDescription	GL Date	Accounting Class	Accounted DR	Accounted CR	Supporting References	Supplier Name	Supplier Site Name	Transaction Number
<input checked="" type="radio"/> Vision Operations (USA)	01-510-7530-0000-000	Operations-Vision Operations In-Equipment Expense-No Sub Account-No Product	06-Jul-1999	Item Expense	90,000.00			General Electric	GE	ERS-5174-198
<input type="radio"/> Vision Operations (USA)	01-510-7530-0000-000	Operations-Vision Operations In-Equipment Expense-No Sub Account-No Product	10-Jul-1999	Item Expense	17,500.00			Office Supplies, Inc.	OFFICESUPPLIES	820100803
<input type="radio"/> Vision Operations (USA)	01-510-7530-0000-000	Operations-Vision Operations In-Equipment Expense-No Sub Account-No Product	30-Sep-1999	Item Expense	940,800.00			General Electric	GE	ERS-5217-339

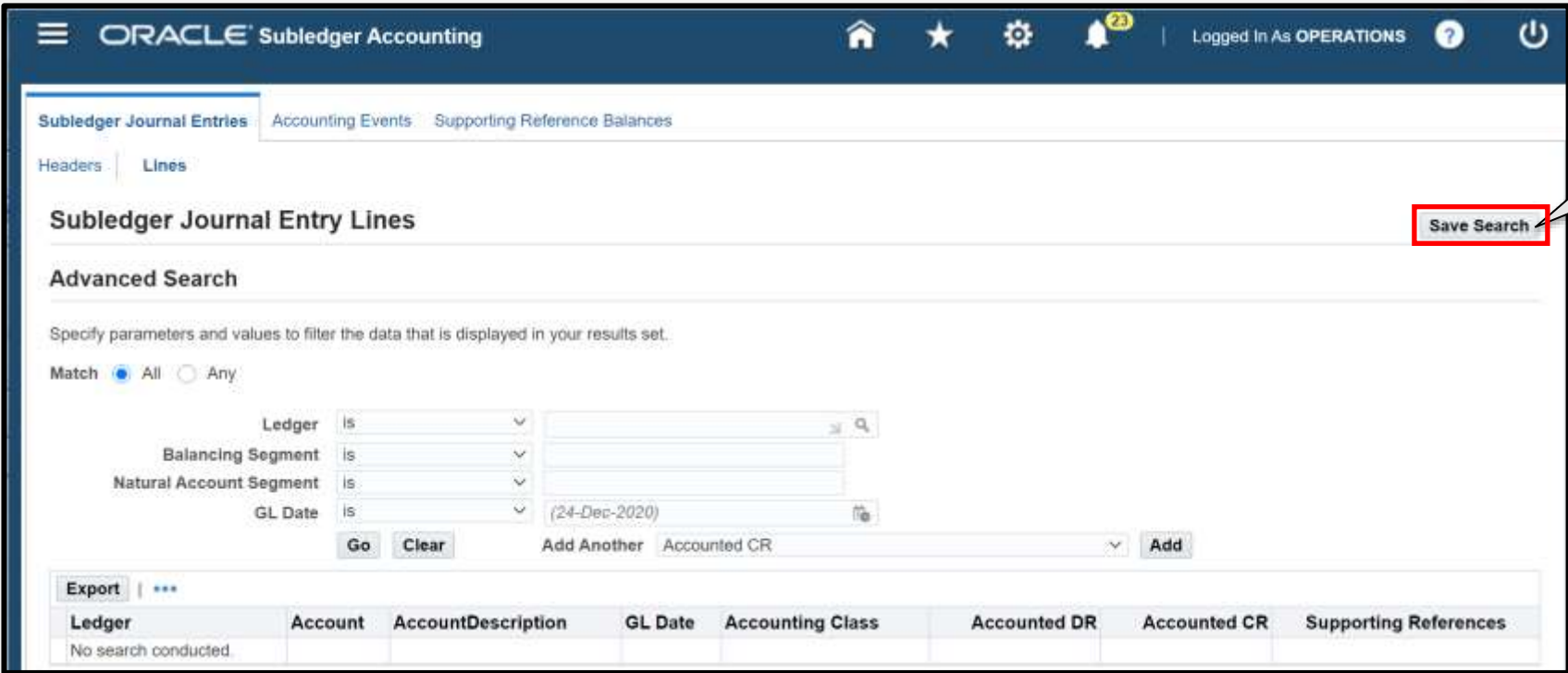
Columns added



Improve user experience/
streamline data entry
Reduce research work

Payables Subledger Journal Entry Lines Saved Search – End Users

- | Payables→Subledger Accounting→Journal Entry Lines
- | To create a view without access to personalizations, create a saved search
 - The advantage is this can be done by end users without access to **Personalize Page** and you can include saved search criteria



Click Save Search

- At a minimum, enter a name for the new search
- Then scroll down on the page to the Column Properties section
- Choose the columns for this view and move them to the displayed columns using the arrow
- Optionally click **Rename Columns and Show Totals**
- Optionally choose sort settings
- Click **Apply**

Create Saved Search

* Indicates required field

Name: Susan's Test View

Row Count: 10

Description:

Search Criteria

Specify parameters and values to filter the data that is displayed in your table.

Match: All Any

Ledger: is

Balancing Segment: is

Natural Account Segment: is

GL Date: is

Add Another Accounted CR Add

(24-Dec-2020)

Column Properties

Columns Shown and Column Order

Available Columns

- SR633
- SR636
- SR637
- SR638
- SR639
- SR640
- SR7
- SR0
- SRG
- Statistical Segment
- Supplier Name
- Supplier Number
- Supplier Site Name
- Supplier Taxpayer Id
- Transaction Number
- Transfer to GL Date
- Transfer to GL Status
- Usage Transaction Code
- Valuation Method

Displayed Columns

- Ledger
- Account
- AccountDescription
- GL Date
- Accounting Class
- Accounted CR
- Accounted CR
- Supporting References

TIP Columns with totaling capabilities shown can only display as the end column of the table.

Sort Settings

Column Name	Sort Order
First Sort	no sort order
Second Sort	no sort order
Third Sort	no sort order

Optional: Rename columns and select columns to total

Reorder columns with these arrows

Optional: Choose sort settings here

Optional step: If the **Rename Columns and Show Totals** button was clicked, rename columns and click the check boxes for columns where you want totals

- Totals will apply to the data in the search criteria

Click **Apply**

Rename Columns and Show Totals

Cancel

Apply

Original Column Name	New Column Name	Show Total
Ledger	<input type="text" value="Ledger"/>	
Account	<input type="text" value="Account"/>	
AccountDescription	<input type="text" value="AccountDescription"/>	
GL Date	<input type="text" value="GL Date"/>	
Accounting Class	<input type="text" value="Accounting Class"/>	
Accounted DR	<input type="text" value="Accounted DR"/>	<input type="checkbox"/>
Accounted CR	<input type="text" value="Accounted CR"/>	<input type="checkbox"/>

| Click **Apply**

Subledger Journal Entries

Accounting Events

Supporting Reference Balances

Headers

Lines

Update Saved Search: Susan's Test View

Cancel

Revert

Apply and View Results

Apply

★ Indicates required field

★ Name

Susan's Test View

Row Count

10

Enter a value between 1 and 100

☐ Set as Default

Description

Search Criteria

Specify parameters and values to filter the data that is displayed in your table.

Match

☒ All

☐ Any

Ledger

is

Balancing Segment

is

Natural Account Segment

is

GL Date

is

(24-Dec-2020)

Add Another

Accounted CR

Add

Since there is no search criteria, clicking **Apply and View Results** will execute a full query which is NOT recommended

Click **Apply**

Subledger Journal Entries

Accounting Events

Supporting Reference Balances

Headers

Lines

Personalize Saved Searches



Cancel

Apply

Select Saved Search:

Duplicate

Create Saved Search

Saved Search Name	Description	Display Saved Search	Default	Update	Delete
<input type="radio"/> Susan's Test View		Yes ▾			

Since this search was created without search criteria, click **Personalize** to enter the search criteria

ORACLE Subledger Accounting

Subledger Journal Entries | Accounting Events | Supporting Reference Balances

Headers | Lines

Subledger Journal Entry Lines

Views

Saved Search Susan's Test View

Go

Personalize

Export | ***

Ledger	Account	AccountDescription	GL Date	Accounting Class	Accounted DR	Accounted CR	Supporting References
No results found.							

Search

Since there is no search criteria, clicking GO will execute a full query which is NOT recommended

Click **Personalize** to enter criteria

Click the pencil to edit

Personalize Saved Searches

Select Saved Search: Duplicate | Create Saved Search

Saved Search Name	Description	Display Saved Search	Default	Update	Delete
Susan's Test View		Yes			



- Enter the search criteria
- Click **Apply and View Results**

Subledger Journal Entries

Accounting Events

Supporting Reference Balances

Headers

Lines

Update Saved Search: Susan's Test View

Cancel

Revert

Apply and View Results

Apply

Indicates required field

Name

Susan's Test View

Row Count

10

Enter a value between 1 and 100

☐ Set as Default

Description

Search Criteria

Specify parameters and values to filter the data that is displayed in your table.

Match

☒ All

☐ Any

Ledger

is

Vision Operations (USA)

Balancing Segment

is

01

Natural Account Segment

is

7530

GL Date

is

(24-Dec-2020)

Add Another

Accounted CR

Add

Click Apply and View Results

If it's a significant risk at your organization that users will do full searches, consider saving the view with limited search criteria

- Since they are going to likely change it anyway, this would be the best practice
- The last saved search criteria will apply until a user changes the criteria

Subledger Journal Entries

Accounting Events

Supporting Reference Balances

Headers

Lines

Subledger Journal Entry Lines

Views

Saved Search

Susan's Test View

Go

Personalize

Select Subledger Journal Entry Line:

View Transaction

View Journal Entry

Export

...

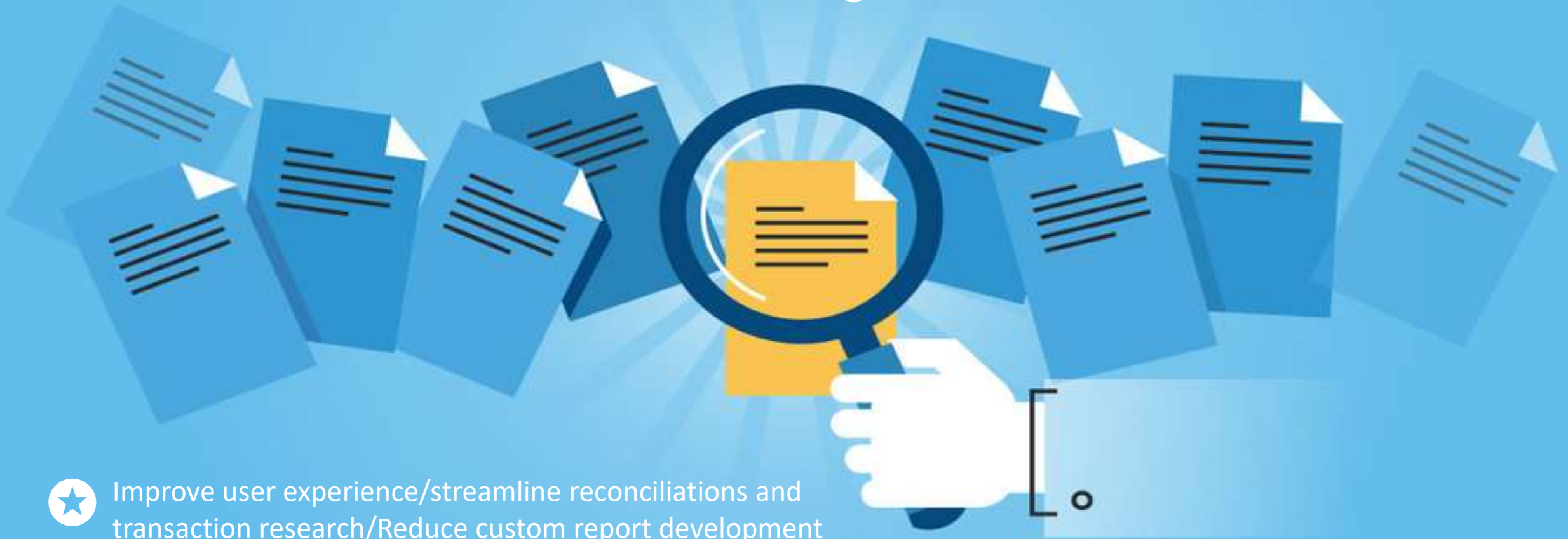
Rows 1 to 30

Ledger	Account	AccountDescription	GL Date	Accounting Class	Accounted DR	Accounted CR	Supporting References	Supplier Name	Supplier Site Name	Transaction Number
<input checked="" type="radio"/> Vision Operations (USA)	01-510-7530-0000-000	Operations-Vision Operations In-Equipment Expense-No Sub Account-No Product	06-Jul-1999	Item Expense	90,000.00			General Electric	GE	ERS-5174-198
<input type="radio"/> Vision Operations (USA)	01-510-7530-0000-000	Operations-Vision Operations In-Equipment Expense-No Sub Account-No Product	10-Jul-1999	Item Expense	17,500.00			Office Supplies, Inc.	OFFICESUPPLIES	820100803
<input type="radio"/> Vision Operations (USA)	01-510-7530-0000-000	Operations-Vision Operations In-Equipment Expense-No Sub Account-No Product	30-Sep-1999	Item Expense	940,800.00			General Electric	GE	ERS-5217-339

Columns added



Subledger Journal Entry Lines – Create Saved Search using Personalization



Improve user experience/streamline reconciliations and transaction research/Reduce custom report development

- | Saved searches can also be created via personalization
- | Click the gear icon, then **Personalize Page**
- | Choose **Table** as the style and click **Go**
- | Click the Seeded User Views icon

Personalize Page: Subledger Journal Entry Lines

Return to Application

Choose Context

Manage Levels

Model Personalization

Personalization Workbench

Personalization Context

Scope

Page: Subledger Journal Entry Lines

Document Name

/oracle/apps/xla/linesinquiry/webui/JelLinesInquiriesPG

Site

Include

Organization

Vision Operations

Responsibility

Payables Manager

Search

Style

Table

Title/Prompt/Text

☐

Include Personalized Items Only

Go

Name	Parent	Shown	User Personalizable	Personalize	Reorder	Create Item	Update Item	Delete Item	Seeded User Views	Customize Look And Feel	View in Hierarchy
Table: Journal Entry Lin...	Flow Layout	Yes	Yes								

Return to Personalization Structure

Select an existing search if available and click **Duplicate** or click **Create Saved Search**

Personalize Saved Searches

CancelApply

Select Saved Search: Duplicate | Create Saved Search Reset User Default Saved Search



Select	Saved Search Name	Description	Display Saved Search	Default	Update	Delete
<input checked="" type="radio"/>	LinesInquiryTable_UserView		Yes ▾			

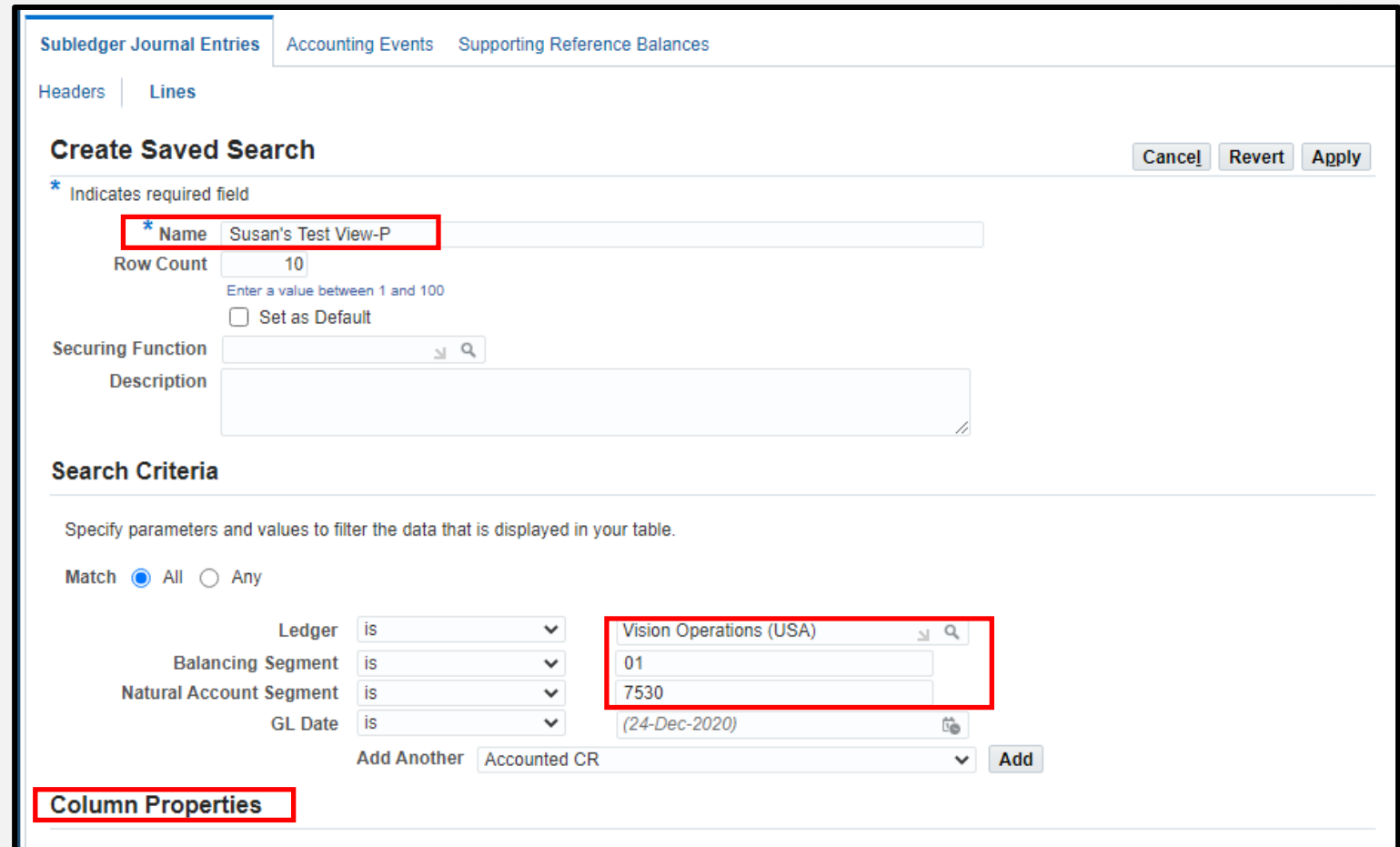
Table Diagnostics

All the remaining steps are almost the same as the earlier slides

At a minimum, enter a name for the new search

Enter search criteria so blind queries cannot be executed

Scroll down on the page to the Column Properties section



Subledger Journal Entries | Accounting Events | Supporting Reference Balances

Headers | Lines

Create Saved Search

Cancel | Revert | Apply

* Indicates required field

* Name Susan's Test View-P

Row Count 10
Enter a value between 1 and 100
☐ Set as Default

Securing Function

Description

Search Criteria

Specify parameters and values to filter the data that is displayed in your table.

Match ☒ All ☐ Any

Ledger	is	<input type="text" value="Vision Operations (USA)"/>
Balancing Segment	is	<input type="text" value="01"/>
Natural Account Segment	is	<input type="text" value="7530"/>
GL Date	is	<input type="text" value="(24-Dec-2020)"/>

Add Another Accounted CR

Add

Column Properties

- Use the arrows to move columns between available and displayed
- For displayed columns, I added Supplier Name, Supplier Site Name and Transaction Number
- Optionally set Sort Settings
- Optionally click **Rename Columns and Show Totals**
- If you are finished, click **Apply**

Column Properties

Rename Columns and Show Totals

Columns Shown and Column Order

Available Columns

- SR634
- SR635
- SR636
- SR637
- SR638
- SR639
- SR640
- SR7
- SR8
- SR9
- Statistical Amount
- Supplier Number
- Supplier Taxpayer Id
- Transfer to GL Date
- Transfer to GL Status
- Ussgl Transaction Code
- Valuation Method
- Customer Name
- IS_CustomerName

Displayed Columns

- Ledger
- Account
- AccountDescription
- GL Date
- Accounting Class
- Accounted DR
- Accounted CR
- Supporting References
- Supplier Site Name
- Supplier Name
- Transaction Number

TIP Columns with totaling capabilities shown can only display as the end column of the table.

Sort Settings

	Column Name	Sort Order
First Sort	<input type="text"/>	no sort order
Second Sort	<input type="text"/>	no sort order
Third Sort	<input type="text"/>	no sort order

Table Diagnostics

Diagnostic Console

Cancel Revert **Apply**

Rename columns if applicable and click the check boxes for columns where you want totals, then click **Apply**

Rename Columns and Show Totals

CancelApply

Original Column Name	New Column Name	Show Total
Ledger	<input type="text" value="Ledger"/>	
Account	<input type="text" value="Account"/>	
AccountDescription	<input type="text" value="AccountDescription"/>	
GL Date	<input type="text" value="GL Date"/>	
Accounting Class	<input type="text" value="Accounting Class"/>	
Accounted DR	<input type="text" value="Accounted DR"/>	<input type="checkbox"/>
Accounted CR	<input type="text" value="Accounted CR"/>	<input type="checkbox"/>

Click **Apply** again

Subledger Journal EntriesAccounting EventsSupporting Reference Balances

HeadersLines

Create Saved Search

CancelRevertApply

Indicates required field

Name

Susan's Test View-P

Row Count

10

Enter a value between 1 and 100

☐ Set as Default

Securing Function

Description

Search Criteria

Specify parameters and values to filter the data that is displayed in your table.

Match

AllAny

Ledger

is

Vision Operations (USA)

Balancing Segment

is

01

Natural Account Segment

is

7530

GL Date

is

(24-Dec-2020)

Click **Apply** on the page with your new saved search

Subledger Journal Entries

Accounting Events

Supporting Reference Balances

Headers

Lines

Personalize Saved Searches

Cancel

Apply

Select Saved Search:

Duplicate

Create Saved Search

Reset User Default Saved Search

Select	Saved Search Name	Description	Display Saved Search	Default	Update	Delete
<input type="radio"/>	LinesInquiryTable_UserView		Yes ▾			
<input type="radio"/>	Susan's Test View-P		Yes ▾			

Click **Return to Application**

Personalize Page: Subledger Journal Entry Lines

Return to Application

Choose Context

Manage Levels

Model Personalization

Personalization Workbench

Personalization Context

Search

Style

Table ▾

Title/Prompt/Text

☐ Include Personalized Items Only

Go

Name	Parent	Shown	User Personalizable	Personalize	Reorder	Create Item	Update Item	Delete Item	Seeded User Views	Customize Look And Feel	View in Hierarchy
Table: Journal Entry Lin...	Flow Layout	Yes	Yes								

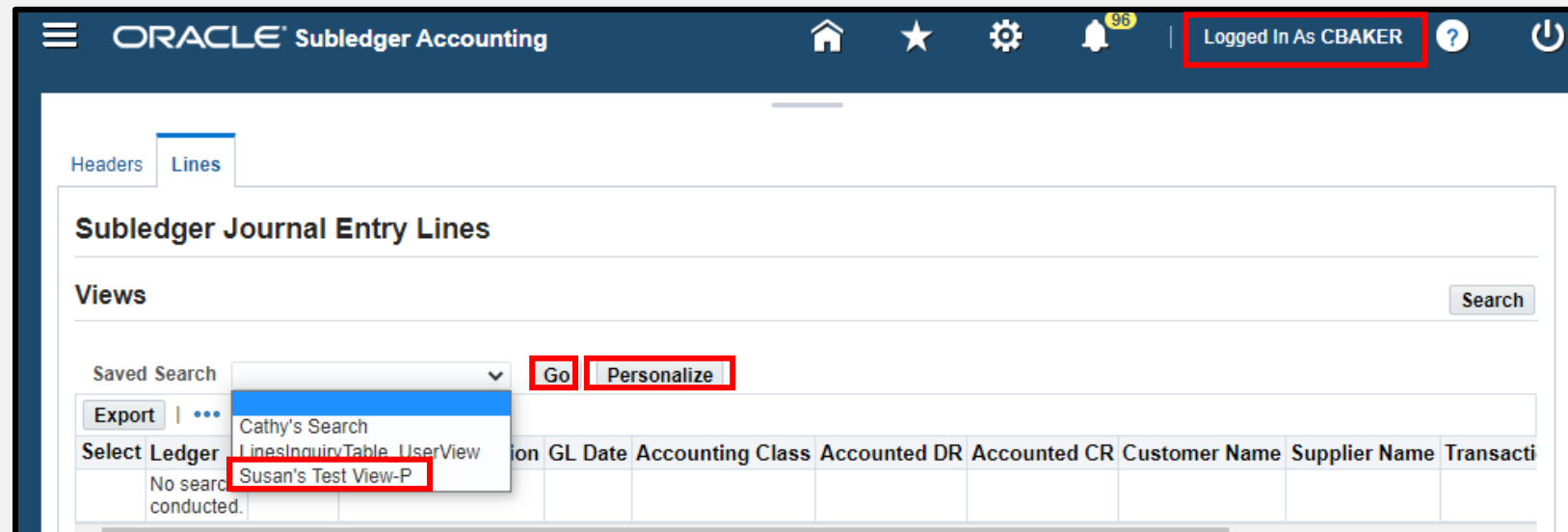
Return to Personalization Structure

Now I am logged in as CBAKER

- CBAKER does not have access to **Personalize Page**
- Personalization was created by OPERATIONS

Click **Personalize** to duplicate Susan's view and change the search criteria

- Users cannot modify a view created with a personalization by another user, but they can duplicate the view and make changes to their new view



The screenshot shows the Oracle Subledger Accounting interface. The top navigation bar includes the Oracle logo, 'Subledger Accounting', and a 'Logged In As CBAKER' status. The main content area is titled 'Subledger Journal Entry Lines' and has tabs for 'Headers' and 'Lines'. Under the 'Views' section, there is a 'Saved Search' dropdown menu. The dropdown is open, showing two options: 'Cathy's Search' and 'Susan's Test View-P'. The 'Personalize' button is highlighted in red. Below the dropdown, there is a table with columns: 'Select', 'Ledger', 'GL Date', 'Accounting Class', 'Accounted DR', 'Accounted CR', 'Customer Name', 'Supplier Name', and 'Transacti'. The table is currently empty, with a message 'No search conducted.' in the first row.

Results

Subledger Journal Entry Lines

Views

Search

Save Search Duplicate of [Susan's Test View-P] Go Personalize

Select Subledger Journal Entry Line: View Transaction View Journal Entry Export ***

Columns added

AccountDescription	GL Date	Accounting Class	Accounted DR	Accounted CR	Supporting References	Supplier Name	Supplier Site Name	Transaction Number
100- Operations-Machine Resources-Equipment Expense-No Sub Account-No Product	15-Feb-2001	Item Expense		250.00	00	Advanced Network Devices	SANTA CLARA-ERS	AN1013021501
100- Operations-Machine Resources-Equipment Expense-No Sub Account-No Product	05-Jan-2009	Item Expense		1,500.00	00	Industrial Dressler	US HEADQUARTERS	IND-052009
100- Operations-Machine Resources-Equipment Expense-No Sub Account-No Product	10-Feb-2009	Item Expense		1,250.00	00	Industrial Dressler	US HEADQUARTERS	IND-022009
100- Operations-Machine Resources-Equipment Expense-No Sub Account-No Product	09-Mar-2009	Item Expense		1,300.00	00	Industrial Dressler	US HEADQUARTERS	IND-032009
100- Operations-Computer Resources-Equipment Expense-No Sub Account-No Product	06-Jan-1997	Item Expense		15,461.29	00	GE Capital	DANBURY	Z337559
100- Operations-Computer Resources-Equipment Expense-No Sub Account-No Product	30-Apr-1997	Item Expense		15,784.36	00	GE Capital	DANBURY	S6330214

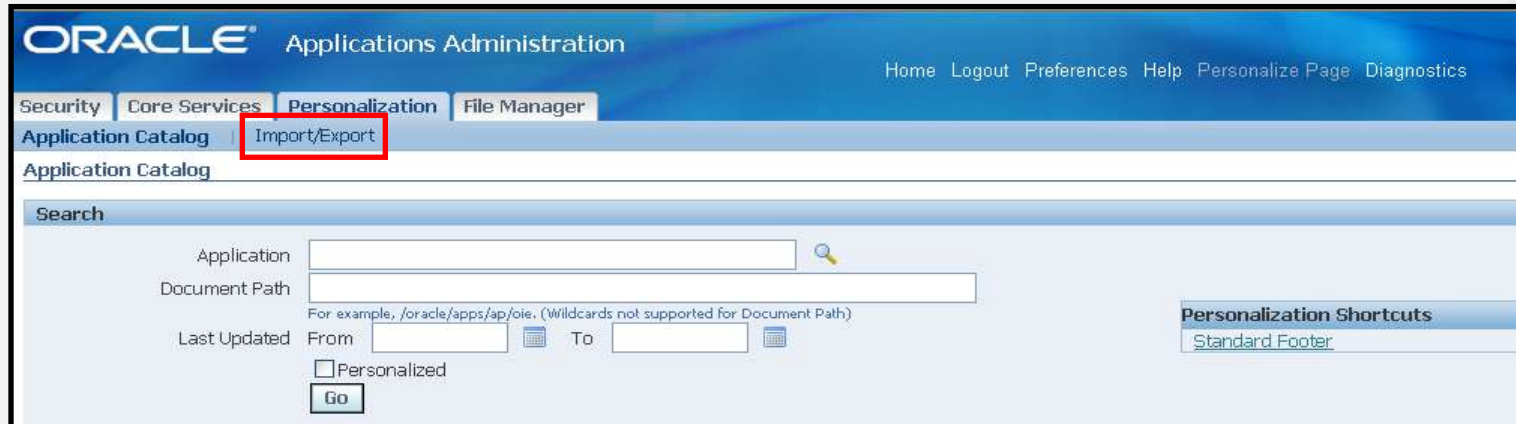


Migrating Personalizations Tips and References



Migrate OA Framework Personalizations from the Functional Administrator Responsibility

- Export to directory defined in FND: Personalization Document Root Path
- FTP to target instance
- Import from Document Root Path directory



ORACLE Applications Administration

Home Logout Preferences Help Personalize Page Diagnostics

Security Core Services **Personalization** File Manager

Application Catalog **Import/Export**

Application Catalog

Search

Application

Document Path

For example, /oracle/apps/ap/ole. (Wildcards not supported for Document Path)

Last Updated From To

☐ Personalized

Personalization Shortcuts

[Standard Footer](#)

To import/export using a script, see MOS Doc ID: 344204.1 (How to use XMLImporter/XMLExporter to import/export personalization) which can be found at: <https://support.oracle.com/epmos/faces/DocumentDisplay?id=344204.1>

| Oracle Application Framework Personalization Guide

| Oracle Applications Developer's Guide

| Oracle Applications System Administrator's Guide

| Oracle Applications User Guide

| Oracle Support Document 1292611.1 <https://support.oracle.com/epmos/faces/DocumentDisplay?id=1292611.1>

| MOS ID: 2289685.1 (Oracle Application Framework Profile Options, Release 12.2.7)

- <https://support.oracle.com/epmos/faces/DocumentDisplay?id=2289685.1>

| MOS ID: 807319.1 (Oracle E-Business Suite Release 12.1 and 12.2 Transfer of Information (TOI) Online Training)

- <https://support.oracle.com/epmos/faces/DocumentDisplay?id=807319.1>

| Previous Infosemantics Presentations on our web site

- [OAF Personalizations – Quick Innovation Wins](#)
- [EBS – OAF Personalization Examples – great rewards with low effort](#)
- [Even more Forms and OAF Personalization Examples-2015](#)
- [Ten More Forms and OAF Personalization Examples – Ver 3... Updated for R12.2](#)
- [Ten New Forms and OAF Personalization Examples for R12.1](#)
- [Customization Reduction with Forms and OA Framework Personalizations R11i/R12](#)

OAF Personalizations – Quick Innovation Wins

- Change the font/color of a field
- Enable DFFs
- Change the number of rows displayed per page
- Change the sorting for a table
- Make a field read only
- Export button – Classic personalization and Workbench personalization example
- Make a field required
- Receivables Account Analysis – add fields, re-sort, export
- Model Personalization – add an adhoc query and table to a page
- Rich table interactions

[EBS – OAF Personalization Examples – great rewards with low effort](#)

- 11i - Change prompts
- 11i - Hide/reorder columns in a table
- 11i - Set initial values
- 11i - Add Tips to a page
- 11i - Modify privacy statement
- 11i - Create an export button
- 11i - Submit a concurrent request
- 11i - Modify the query for a table
- 11i - Enable Record History in some pages
- 11i - About this record for Suppliers (When enabling record history doesn't work)
- 12.0 - How to restrict a field length
- 12.0 Change the number of rows displayed per page
- 12.2 - Drag and Drop to move and resize table columns in OAF
- 12.2 - Announcements on Simplified Home Page
- 12.0 - Account analysis screen in Payables – easy new way to add fields to a table
- 12.2 - Add a new table with an adhoc query to a page
- 12.2 Instance name on Announcement Page

[Even more Forms and OAF Personalization Examples-2015](#)

- OAF Examples
 - Drag and Drop to move and resize table columns in OAF
 - Announcements on Simplified Home Page
 - Account analysis screen in Payables – add transaction number, customer name, supplier name to table which also includes in export
 - Remove the Create from the Supplier Quick Update page when adding a supplier - confusing button since you have to add address first
 - Add a new table with an adhoc query to a page
- Forms Examples
 - Launch a URL passing parameters
 - Payables - set terms for Credit Memo to Immediate as it inherits standard terms
 - You want the credit memo to net on next payment
 - Warn if updating invoice < 2 hours old
 - In condition, use responsibility “like” query to get around limitation of context
 - Prevent Employee from entering or updating invoice related to themselves

[Ten More Forms and OAF Personalization Examples – Ver 3... Updated for R12.2](#)

- Forms Examples
 - **Export Hidden Canvases**
 - **Security → User → Define**
 - Warning if attempting to end date users with active expense reports
 - **AR Open/Close Periods – Warning if user tries to close period if records exist in interface table or lockbox**
 - **AP Invoices – Check for duplicate invoice number for the same supplier in another operating unit**
 - **AP Payments – Set default payment type to manual and prevent user from updating the payment type**
- OAF Examples
 - **Enable Record History in some pages**
 - **About this record for Suppliers**
 - When enabling record history doesn't work
 - **How to restrict a field length**
 - **Change the number of rows displayed per page**
 - **Model Personalization**
 - Create a view object and place the data on a form

[Ten New Forms and OAF Personalization Examples for R12.1](#)

- Forms Examples
 - Change a Prompt
 - Display a message
 - Menu, Builtin to Launch a Function
 - Menu, Builtin – Execute a procedure to call a workflow
 - GO_ITEM
- OAF Examples
 - Remove a link
 - Privacy Statement
 - Export Button on Suppliers page
 - Create a button to submit a concurrent request
 - Modify a Query

[Customization Reduction with Forms and OA Framework Personalizations R11i/R12](#)

- Forms Examples
 - Prevent Errors – Display a reminder message during year end close to set GL Date
 - Security - Restrict users from entering or retrieving their own invoice
 - Support – Display invoice id for approval workflow support
 - Functionality – Call a procedure after invoices are saved to create use tax distributions
 - Security – mask data
 - Security – Change LOV to remove sensitive data
- OAF Examples
 - Remove a button
 - Change prompts
 - Hide/reorder columns
 - Set initial values
 - Add tips

SAVE THE DATE

- ASCEND CONFERENCE 2022

June 12-15, 2022

the Aria in Las Vegas, NV

<https://ascendusersconference.com>



- MOUS 2022

October 26, 2022

Schoolcraft College - VisTaTech Center,
18600 Haggerty Rd, Livonia, MI

<https://www.mous.us>



THANK YOU

www.mous.us



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- Session Surveys

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