Using Personalizations and Other Techniques to Give Your Self-Service Applications a Custom Look and Feel

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Paper Abstract
Release 11.5.10 provides a new, fantastic tool for the self-service applications to give them a custom look and feel. You can use this tool, personalizations, to change headings, hide fields, move them around, and more. And the best part of all this is you don't need to be a techie to use it.

Executive Summary
Carnegie Mellon University recently upgraded their applications from 11.0.3 to 11.5.10 CU2. One of the significant customizations they were using and didn't want to carry forward was their integration of the procurement card to Oracle Grants Accounting. While the procurement card transaction process is not integrated with Grants in 11.5.10, internet expenses is so they converted all their procurement cards to travel cards and used iExpenses to process their procurement card transactions.

CMU was already using Internet Expenses or Expense Reporting as it was known in 11.0.3 to handle their travel-related expense reporting so they made a few adaptations to give iExpenses a look and feel that would make their Procurement Card users feel at home. They changed the names of page headings, column headings, removed unwanted web links, hid some columns and moved some others around. They defaulted in some information to some fields, changed button names, and hid other buttons.

All of this was done using personalizations by a functional user and no technical expertise was necessary.

Paper and Presentation Notes

This training session will demonstrate how you can change the look and feel of your self-service applications. We will show how you can use personalizations and messages to give your self-service applications a custom look and feel.

To do this, we will demonstrate some of the things we did at Carnegie Mellon University to use the Internet Expenses application to process our Procurement Card transactions. CMU developed a stand-alone module to handle procurement card transactions when they implemented 11.0.3. They needed something that integrated with Oracle Grants and in 1999 that process wasn't part of the Oracle applications. During the upgrade to 11.5.10, CMU re-evaluated this customization.

Let me emphasize that this paper is not about how CMU adapted internet expenses so they could process procurement card transactions. It is about how CMU used personalizations to help them use internet expenses to process their procurement card transactions.

The standard Oracle procurement card process in 11.5.10 isn't integrated with Grants but Internet Expenses is. So the question was asked, could iExpenses handle procurement card transactions?

There are similarities between the two processes. Both processes download credit card transactions, the user reviews and verifies the accounts and amounts and submits them for approval. In addition, they found the benefits of using iExpenses for both sets of transactions were that:

- The users would have the same tool to handle their credit card and travel transactions.
- There would be efficiencies in training and supporting the users.
- The procedures and guidelines for approving travel and procurement card expenses would become more consistent.
- Policy decisions could be enforced uniformly.

There are differences in the processes too. Procurement card transactions are company paid, there are no cash or out of pocket transactions. The Expense Report Templates are unique and need to be segregated.

Procurement polices are different than travel policies and there are differences in terminology. For example, no travel-related costs are allowed on the procurement card – they are for the procurement of goods and services. The cards are restricted for travel-related suppliers such as airlines, car rental agencies, and hotels. There is a monthly limit on the amount that can be charged to a procurement card. No out-of-pocket charges can be included in the validation of procurement card transactions.

These distinctions required CMU to create a custom look and feel to Internet Expenses for procurement cards without impacting the travel expense reporting process. Personalizations was the perfect answer to resolve many of these requirements.

Using personalizations, CMU was able to use the same application for both process but still maintain separate policies and control. This session will demonstrate on a limited basis how CMU used personalizations to segregate the two processes. In doing so, it will demonstrate various ways that personalizations can touch the look and feel of your self-service applications. Even though we are using Internet Expenses to demonstrate personalizations, they apply to all self-service applications.

Even though we are discussing internet expenses, this demonstration of personalizations applies to any self-service Oracle application.

What Are Personalizations?

Personalizations refer to the ability to tailor the self-service applications, specifically the look and feel, the layout and the visibility of the content.

Oracle refers to this technology as the Oracle Applications Framework Personalization. The OA Framework Release 5.7 is available if you are at 11.5.9 and have applied rollup patch 3323690. It is a standard feature on 11.5.10.

You can tell that these features are available if in the upper right-hand corner of the home page of the Oracle E-business suite, you have a Personalize Page link.

There is a profile options that can hide this link. It is called **Personalize Self-Service Defn** so if you don't see the link, you might check the profile option. The value should be set to Yes to see the links. That is the default value.

Don't confuse these OAF personalizations with the core application form personalizations. To personalize a core application form requires the database password and skills typically found in an application developer. The OAF personalizations allow a somewhat skilled functional user to change screens (or pages) in the self-service application without impacting the core application forms.

How do I use Personalizations?

EXPENSES HOME PAGE

1. Remove buttons

Change	**Link**	**Path**	**Level**	**Personalize**
Remove the Import Spreadsheet button	Personalize Page	Page Layout: Expenses Home > Page Button Bar: > Button: Import Spreadsheet	Responsibility	Rendered = False
Remove the Export Spreadsheet button		Page Button Bar: > Button: Export Spreadsheet	Responsibility	Rendered = False

Personalizations allow you to make changes at various levels of activity with the lowest level of activity taking precedence over a higher level of activity. The levels of applying personalizations are:

Function: Admin can define functions and can define granular level personalization based upon these functions. For example, two functions can be created for same form based upon the functionality of Update only and one for creating records. And then personalization can be defined for each function.
Site: Personalizations that affect all users with access to the given application component.
Operating Unit: Personalizations that affect all users with access to the given operating unit.
Responsibility: Personalizations that affect all users with access to the given responsibility.

The default values for every personalization are defined in the first column and inherited at every descending level of activity. If the value is changed at any level, then all lower levels inherit the changed valued. The term inherit is used frequently and means that the level inherits the definition from the level immediately above it. Using the above example, a value of false at the site level means that the value will be false for all operating units and for all responsibilities that access that page. However, I can override that by setting one value at a high level and a different value at a lower level. If I entered False for Rendered at the Operating Unit level and True at the Responsibility level, then that responsibility would see the buttons but no one else in that operating unit would.

This feature of applying personalizations at various levels enabled us to differentiate our travel expense reporting from our procurement card reporting because we created a unique responsibility for both.

2. Change the button name

Change	Link	Path	Level	Personalize
Change button name: From Create Expense Report to Create Credit Card Verification Report.	Personalize Page	Page Layout: Expenses Home > Page Button Bar: > Button: Create Expense Report	Responsibility – Procurement Card	Prompt = Create Verification Report

3. Change the Header

Change	Link	Path	Level	Personalize
Change Header "Track Submitted Expense Reports" to "Track Submitted Credit Card Verification Reports"	Personalize "OIE Home Page Container"	Default Single Column > Header: Track Submitted Expense Reports	Responsibility – Procurement Card	Text = Track Submitted Credit Card Verification Reports
Change Header "Update Expense Reports" to "Update Credit Card Verification Reports"		Default Single Column > Header: Update Expense Reports	Responsibility – Procurement Card	Text = Update Credit Card Verification Reports

4. Hide the Duplicate Column

Change	Link	Path	Level	Personalize
Remove Duplicate Option from the Track Submitted PCard Verification Report table	Personalize Page	Page Layout: Procurement Card Home->Header: Track Submitted PCard Verification Reports->Switcher: Duplicate	Responsibility – Procurement Card	Rendered=False

GENERAL INFORMATION PAGE

5. Change a Field Name

Change	Link	Path	Level	Personalize
Change Expense Cost Center to Default Organization Number	Personalize Page	Page Layout > Page Button Bar: > Page Button Bar: Actions Region > Message Text Input: Expense Cost Center	Site	Prompt = Default Organization Number

6. Set the Initial Value

Change	Link	Path	Level	Personalize
Default the Purpose to PCard Verification	Personalize Page	Page Layout > Page Button Bar: > Page Button Bar: Actions Region > Message Text Input: Purpose	Responsibility – Procurement Card	Initial Value = PCard Verification
And make the purpose read only				Rendered = True

7. Hide one of the Train Links

Change	Link	Path	Level	Personalize
Remove the Cash and Other Expenses from the Navigation Train	Personalize Page	Page Layout > location > Train: OIE Train > Link: Cash and Other Expenses	Responsibility – Procurement Card	Rendered = False

CREDIT CARD EXPENSES

8. Change date to be non-updatable

Change	Link	Path	Level	Personalize
Change the Date to be Non-Updatable	Personalize Page	Page Layout > Flow Layout: Credit Card Expenses > Header: Business Expenses > Table > Switcher Error > Message Text Input: Date	Site	Read Only = True

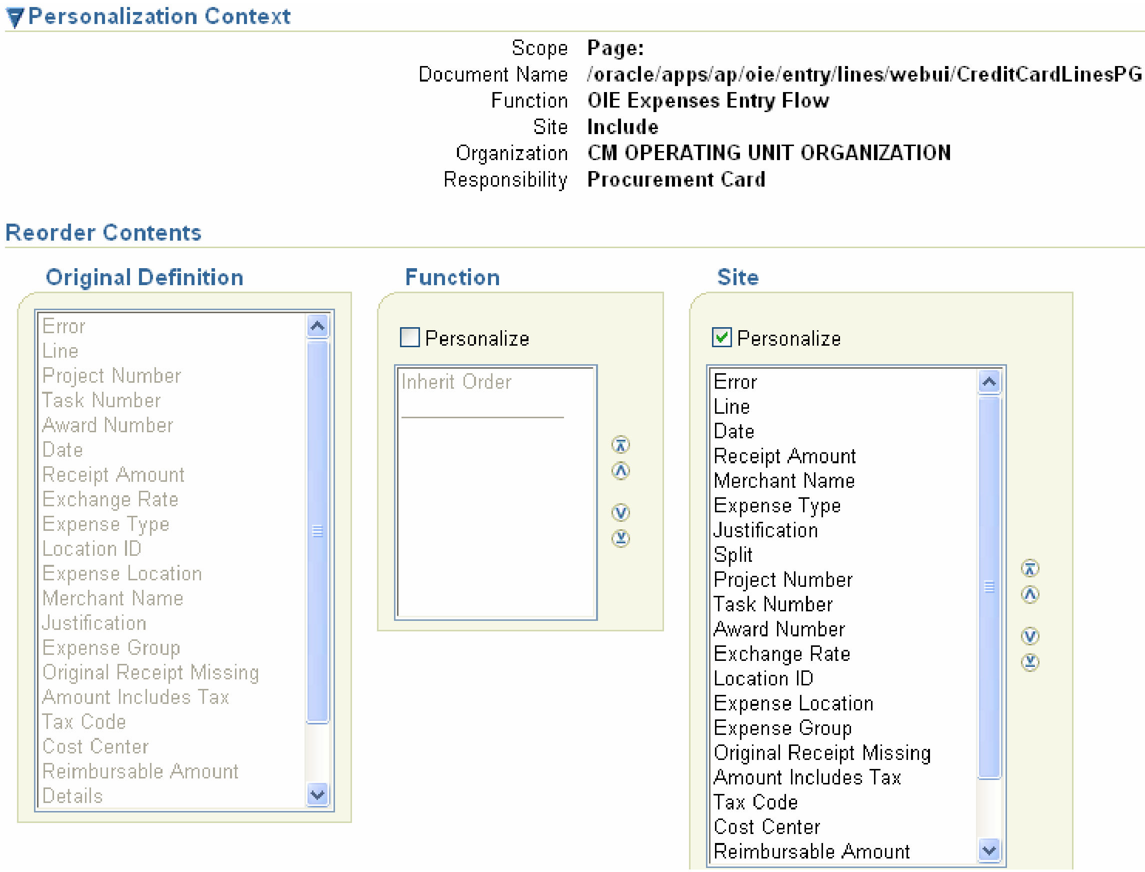
Demonstrate the use of
Focus: Displays only those items in that grouping,
Expand All: Display items at all levels,
Collapse All: Hide items at all levels,
Simple View: Display the focused items
Complete View: Display all components
Find (Ctrl F): Browser tool to find key words

9. Change Column Heading

Change	Link	Path	Level	Personalize
Change the Heading Itemize to Split	Personalize Page	Page Layout > Header: Business Expenses > Table > Switcher Error > Image: Itemize	Site	Prompt = Split

10. Reorder the Columns

Change	Link	Path	Level	Reorder
Reorder the display of the columns in the Site	Personalize Page	Page Layout > Header: Business Expenses > Table	Site	
Click on the Personalize box in the Site section				
Use the arrows to reorder the columns				



11. Create an Item – Add Employee Name to Cash and Other Expenses

Change	Link	Path	Level	Reorder
Add a field call Employee Name to the Cash and Other Expenses page	Personalize “Receipt-Based Expenses”	Default Single Column: Receipt-Based Expenses		
Enter the following:		*ID: EmloyeeName CSS Class: OraDataText Prompt: Employee Name View Attribute: FullName View Instance: PersonsVO		
Reorder		Move Employee Name above Split and Receipt Based Expenses		

Create Item

* Indicates required field

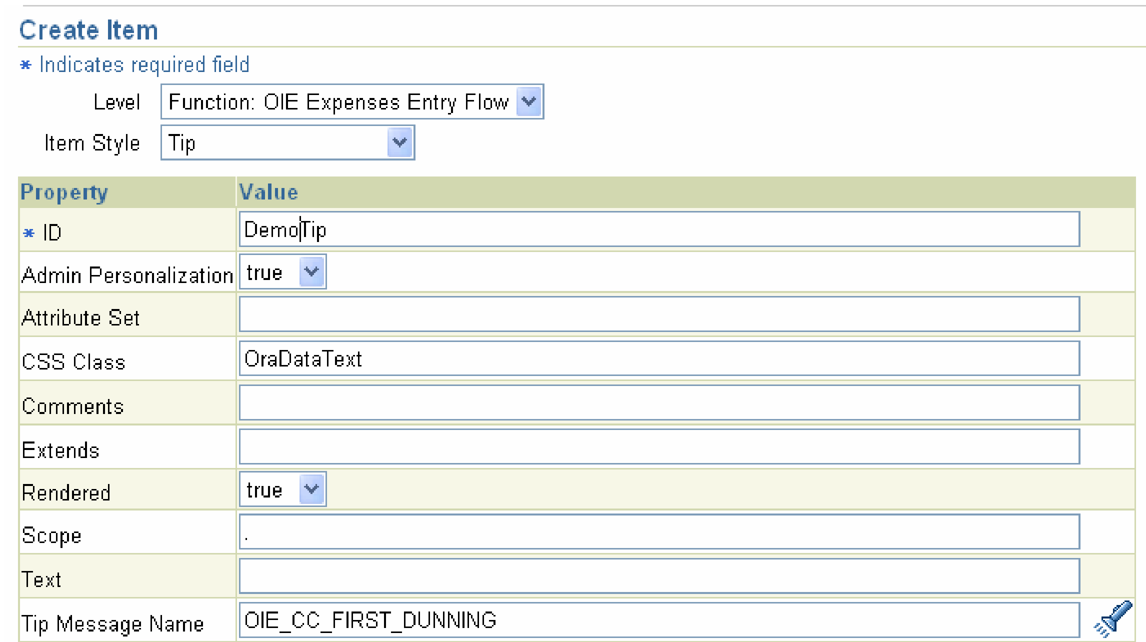
Level: Function: OIE Expenses Entry Flow

Item Style: Message Styled Text

Property	Value
* ID	EmployeeName
Access Key	
Additional Text	
Admin Personalization	true
Attribute Set	
CSS Class	OraDataText
Comments	
Data Type	VARCHAR2
Destination Function	
Destination URI	
Disable Server Side Validation	false
Export View Attribute	
Extends	
Height	
Initial Sort Sequence	none
Long Tip Region	
Maximum Length	
No Wrap	false
Prompt	Employee Name
Rendered	true
Required	no
Scope	.
Search Allowed	false
Selective Search Criteria	false
Sort Allowed	no
Sort By View Attribute	
Tip Message Name	
Tip Type	none
Total Value	false
User Personalization	false
Vertical Aligment	middle
View Attribute	FullName
View Instance	PersonsVO
Warn About Changes	true
Width	

12. Create an Item – Add a Tip for Cash and Other Expenses

Change	Link	Path	Level	Reorder
Add a message using the Application Developer				
Add that message as a tip to the Cash and Other Expenses page				



Questions:

Are personalizations upgradeable? Yes

Can they be migrated to other instances? Yes

How do you manage personalizations?

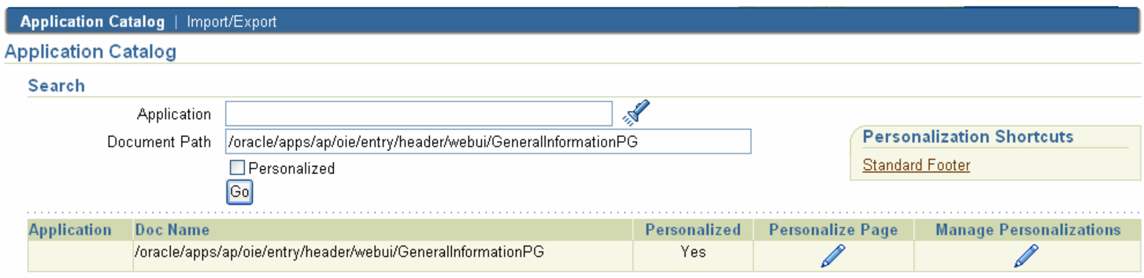
Managing Personalizations

Functional Administrator responsibility

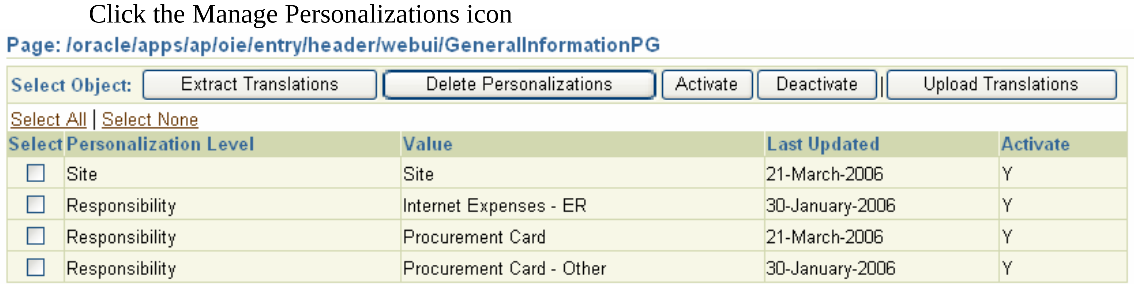
Personalizations Tab

Enter the Document name in the Document Path

Hint: Before switching to the Functional Administrator responsibility, go to the page that's been personalized and swipe the Document Name and copy it. Then using the Functional Administrator responsibility, navigate to the Personalizations tab and paste it into the Document Path and click Go.



Click the Manage Personalizations icon



Here, you can Deactivate, Activate, or Delete personalizations.

Use the Extract and Upload buttons to migrate personalizations to other instances. Preliminary steps are required before doing such as defining the common server location where all the personalizations will be put into and read from. This will take technical expertise beyond the scope of this paper.

About this Page

Find this link in the lower left-hand corner of every self-service page. Click on this link to see Personalizations, Patches, and lots of useful (depending on who you talk to) stuff.

Items listed in the Manage Personalizations page identify the pages that have been personalized and even the level to which they were applied but they don't identify specifically what was personalized. You can find that information by navigating to that page and clicking on the About this Page link.

Personalizations are cool, easy to use, easy to manage, and upgradeable.

About the Author

Don Driggs is a Senior Consultant at Solution Beacon and is a frequent presenter at OAUG. Don has 23 years experience in supporting financial applications with ten of them using Oracle applications and eight as a consultant. He also is a Co-Author of *Special Edition Using Oracle 11i* published by QUE Publishing in 2001.