



INSTALLATION GUIDE

Alaris Technology, Inc.

Forms Personalization
Configuration Guide – Web Sample
R12

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Enable launching OM Order Organizer from Depot Repair

This section describes the setup process for the above. This document is representative of a typical 'how to' or 'setup guide', clients are provided by Alaris Technology, Inc. This would normally be provided in addition to typical AIM documentation such as BR100s, MD050s, MD70s, etc.

Description

This is an example of a real solution Alaris provided for one of our customers. The problem was: users responsible for managing sales orders and repair orders, found navigation between the forms to not be user-friendly. The process followed, starts with the repair order, then requires users to navigate to the sales order form from Order Management. Enabling this personalization reduces the number of clicks, improves the user experience, and enhances overall efficiency. All of this with a supported, patch-friendly configuration.

Before You Start

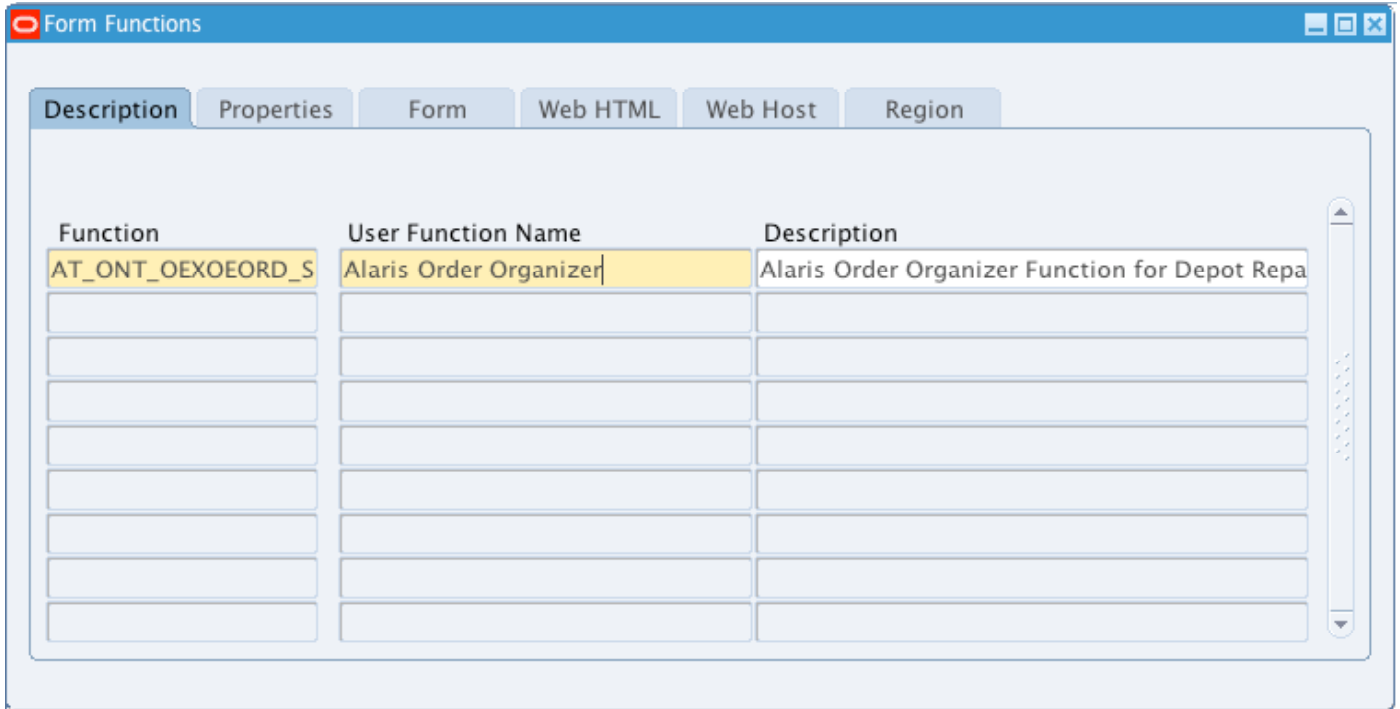
Before setup, you should have completed the following:

- Ensure all related documents referred to are complete.
- Ensure that you have the responsibilities, Depot Repair Super User, System Administrator

How to Setup

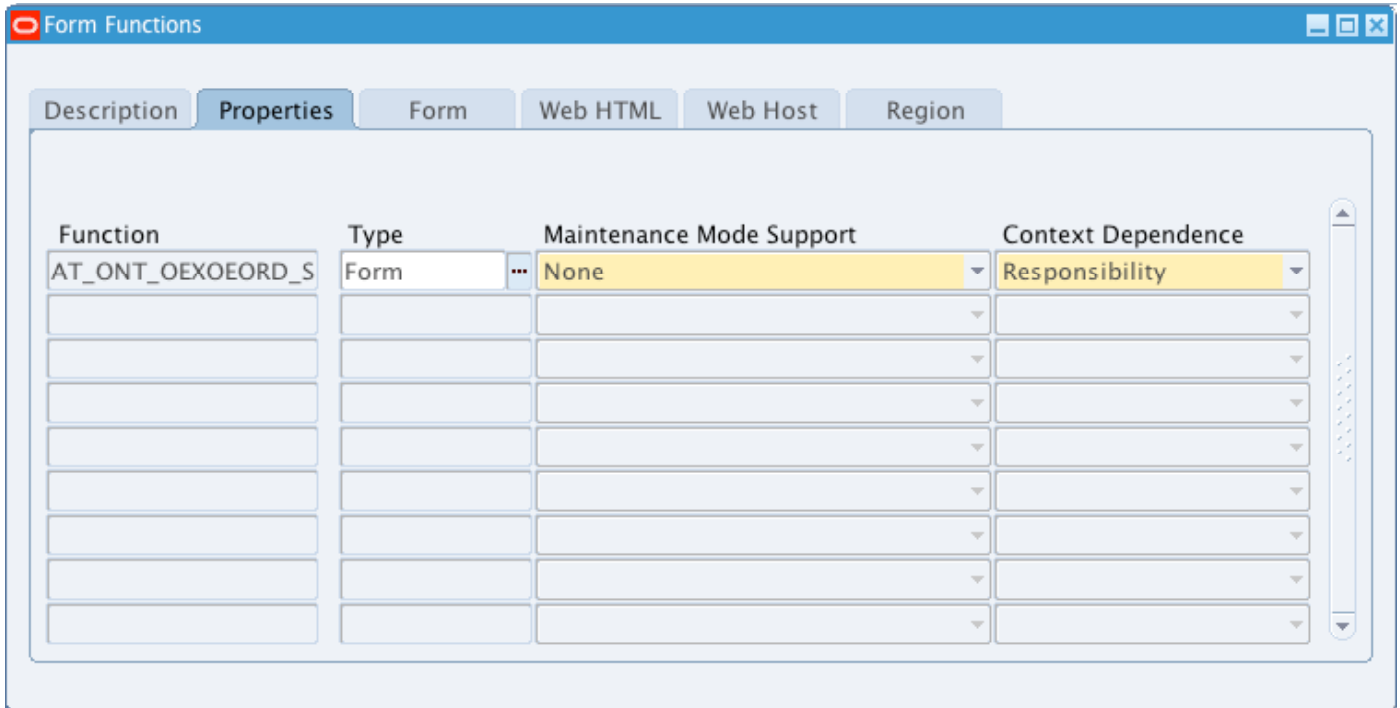
Create custom Function, "AT_ONT_OEOXORD_SUM" and assign to CSD_MAIN_MENU menu.

Login as **System Administrator > Application > Function**. Create the function, AT_ONT_OEXOEOORD_SUMMARY as shown here.

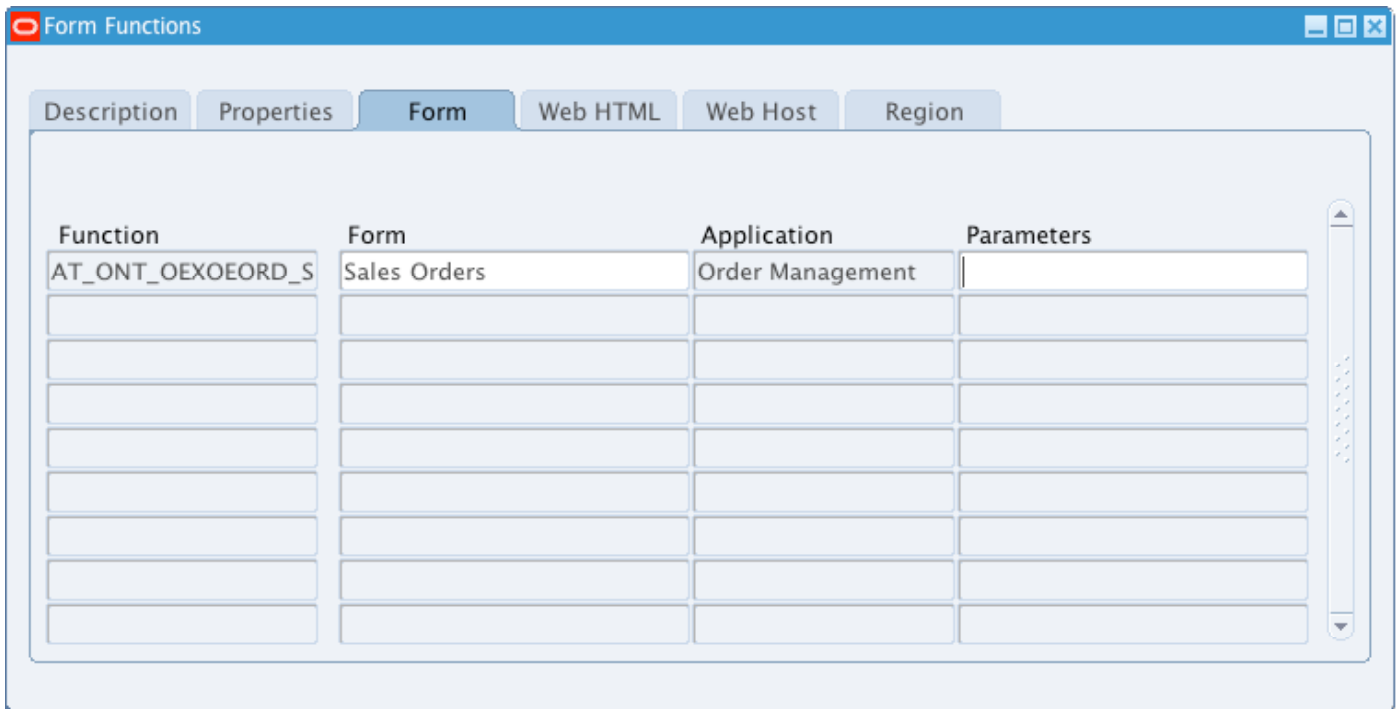


Function	User Function Name	Description
AT_ONT_OEXOEOORD_S	Alaris Order Organizer	Alaris Order Organizer Function for Depot Repa

Setup the **Properties** and **Form** tabs as shown in the following two screen shots.



Function	Type	Maintenance Mode Support	Context Dependence
AT_ONT_OEXOEOORD_S	Form	None	Responsibility



Function	Form	Application	Parameters
AT_ONT_OEXOEOORD_S	Sales Orders	Order Management	

There is no setup on the last 3 tabs.

Save your work.



Next, still using the System Administrator responsibility, navigate to **Application > Menu**. Query the menu, CSD_MAIN_MENU.

Add the function created above on row 30 as shown here.

The screenshot shows the 'Menus' application window with the following details:

- Menu: CSD_MAIN_MENU
- User Menu Name: Depot Repair Main Menu
- Menu Type: Standard
- Description: Depot Repair Main Menu

Seq	Prompt	Submenu	Function	Description	Grant
23		ENG_NAVIGATE_GUI		Engineering	<input checked="" type="checkbox"/>
24	Cost	CST_NAVIGATE			<input checked="" type="checkbox"/>
25		CRP_NAVIGATE4.0		Capacity Planning	<input checked="" type="checkbox"/>
26	Purchasing	Purchasing SuperUser G			<input checked="" type="checkbox"/>
27			Repair Order Status Tran		<input checked="" type="checkbox"/>
28			Repair Type Transitions		<input checked="" type="checkbox"/>
29			Update Repair Type		<input checked="" type="checkbox"/>
70			Alaris Order Organizer		<input checked="" type="checkbox"/>
133			CS_KB_ADVSEARCH_INT	Knowledge Base Advance Search S	<input checked="" type="checkbox"/>
147			CS_KB_SMS_SOLN_VIEW	Knowledge Base Solution Screen	<input checked="" type="checkbox"/>

Description: Creating this custom function will allow you to personalize the Order Management (OM) Order Organizer without affecting the standard form/function already used by the OM organization. This will keep the personalization relevant only to, in this case, Service users.

Save your work.



Login as Depot Repair Super User:

Setup Forms Personalization to launch the Order Organizer from Repair Order:

Navigate to Depot Repair → Repair Orders → New → Help → Diagnostics → Custom Code → Personalize

The screenshot shows the Oracle Applications 'Repair Orders' form. The 'Help' menu is open, and the path 'Diagnostics' → 'Custom Code' → 'Personalize' is highlighted. The form contains several sections:

- Service Request Information:** Fields for Customer Type (Organization), Customer, Account, Phone, Bill-To, and Ship-To.
- Repair Order Information:** A table with columns: Repair Num, Repair Type, Item, Item Description, Request Num, Summary, Request Type (Depot Repair), Severity (Low), Status (Open), and Owner.
- Details Tab:** Fields for Repair Num, Item, Revision, Instance, Serial Num, Unit Num, Lot Num, Repair Mode, Installed Site, Default Contract, Currency, Default Price List, Default PO Num, Repair Org, Repair Owner, Project, and Project Task.
- Problem Description:** A text area for describing the issue, with fields for Priority, Date Created, Resolve By Date, Promise Date, and Date Closed.
- Options:** Checkboxes for 'Automatically Enter and Book RMA' (unchecked) and 'Estimate Approval Required' (checked).
- Buttons:** 'Go...', 'View Configuratio...', 'Update Counters...', and 'Update RO Status...'.



Enter Line 10, "Custom Menu" as shown here.

Seq	Description	Level	Enabled
10	Custom Menu	Function	<input checked="" type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

Condition

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

Trigger Object:

Condition:

Processing Mode: Not in Enter-Query Mode

Context

Level	Value
Site	

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

Trigger Event: WHEN-NEW-FORM-INSTANCE

Trigger Object:

Condition: null

Processing Mode: Not in Enter-Query Mode

Level: Site

Save your work.



Click on the **Actions** tab.

Form Personalizations (Depot Repair Orders)

Function Name: CSDREPLN Form Name: CSDREPLN Debug Mode: Off

Seq	Description	Level	Enabled
10	Custom Menu	Function	<input checked="" type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

Condition **Actions**

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

Menu Entry: SPECIAL2: Open Sales Order

Menu Label: Open Sales Order

Render line before menu

Icon Name: _____

Enabled in Block(s): RCV_SHIP

Add Block...

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

Enter the following in the Actions table:

Seq: 10

Type: Menu

Description: Order Organizer

Menu Entry: SPECIAL2

Menu Label: Open Sales Order

Render line before menu: No

Icon Name:

Enabled in Block(s): RCV_SHIP

Description: This action sets the menu entry (in this case on the Actions menu bar) and also defines in which block the menu is active/available for selection. By setting the Enabled in Block(s) value to 'RCV_SHIP', this ensures that the hotlink can only be selected when highlighting a logistics line which will contain the sales order number (a required variable).

Save your work.



Enter line 20, "Open Sales Order Form" as shown here:

Seq	Description	Level	Enabled
10	Custom Menu	Function	<input checked="" type="checkbox"/>
20	Open Sales Order Form	Function	<input checked="" type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

Condition

Trigger Event: SPECIAL2 (You can enter additional event names.)

Trigger Object:

Condition:

Processing Mode: Not in Enter-Query Mode

Context:

Level	Value
Site	

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

Trigger Event: SPECIAL2

Trigger Object:

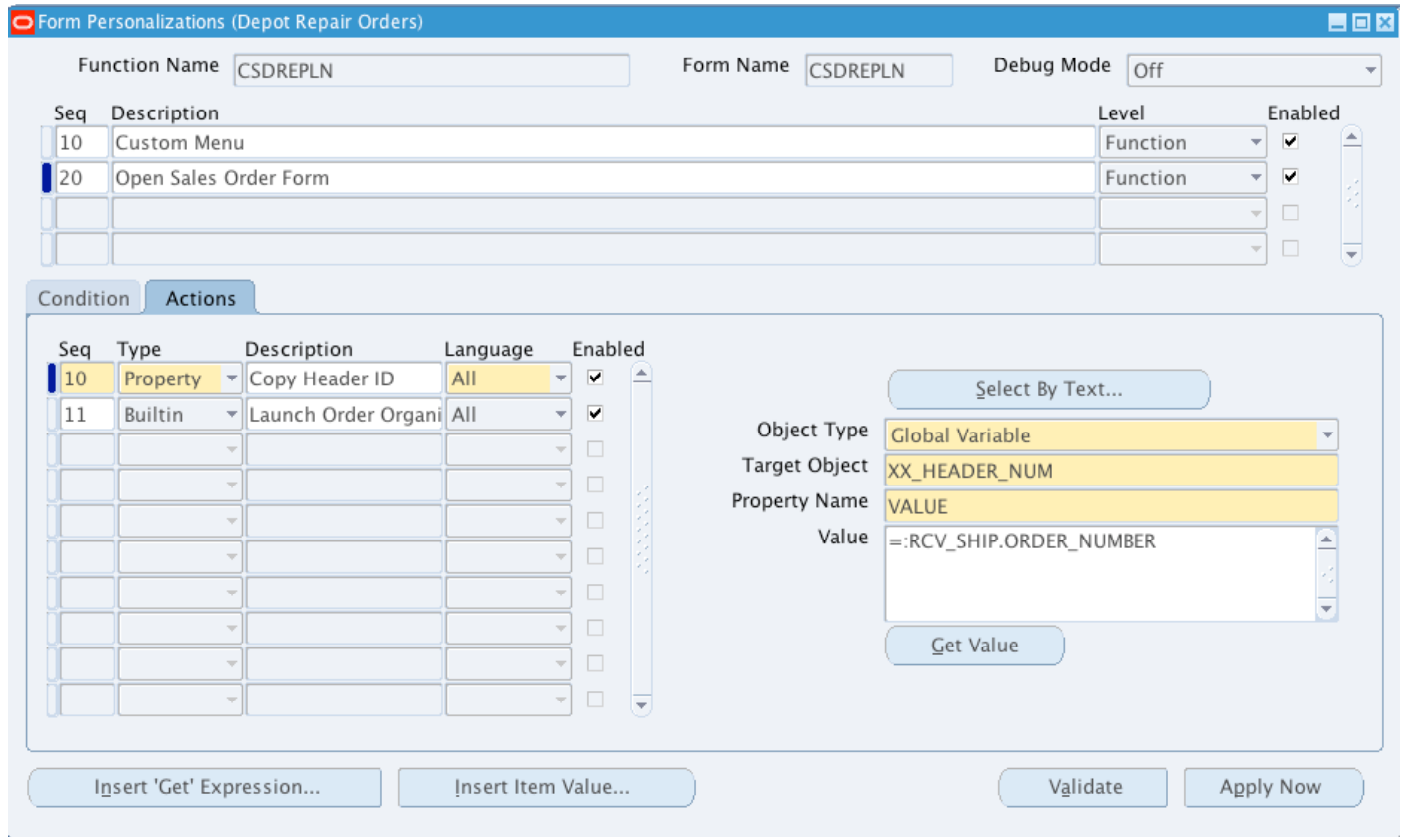
Condition:

Processing Mode: Not in Enter-Query Mode

Level: Site

Save your work.

Click on the **Actions** tab.



The screenshot shows the 'Form Personalizations (Depot Repair Orders)' window. At the top, there are fields for 'Function Name' (CSDREPLN), 'Form Name' (CSDREPLN), and 'Debug Mode' (Off). Below this is a table with columns 'Seq', 'Description', 'Level', and 'Enabled'. The table contains two rows: Seq 10, Description 'Custom Menu', Level 'Function', Enabled checked; and Seq 20, Description 'Open Sales Order Form', Level 'Function', Enabled checked. Below the table are two tabs: 'Condition' and 'Actions'. The 'Actions' tab is active and shows a table with columns 'Seq', 'Type', 'Description', 'Language', and 'Enabled'. The table contains two rows: Seq 10, Type 'Property', Description 'Copy Header ID', Language 'All', Enabled checked; and Seq 11, Type 'Builtin', Description 'Launch Order Organi', Language 'All', Enabled checked. To the right of the table is a configuration panel for the selected action (Seq 10). It includes a 'Select By Text...' button, a dropdown for 'Object Type' (Global Variable), a dropdown for 'Target Object' (XX_HEADER_NUM), a dropdown for 'Property Name' (VALUE), and a text field for 'Value' (=:RCV_SHIP.ORDER_NUMBER). Below the text field is a 'Get Value' button. At the bottom of the window are four buttons: 'Insert 'Get' Expression...', 'Insert Item Value...', 'Validate', and 'Apply Now'.

Seq: 10

Type: Property

Description: copy header id

Object Type: Global Variable

Target Object: XX_HEADER_NUM

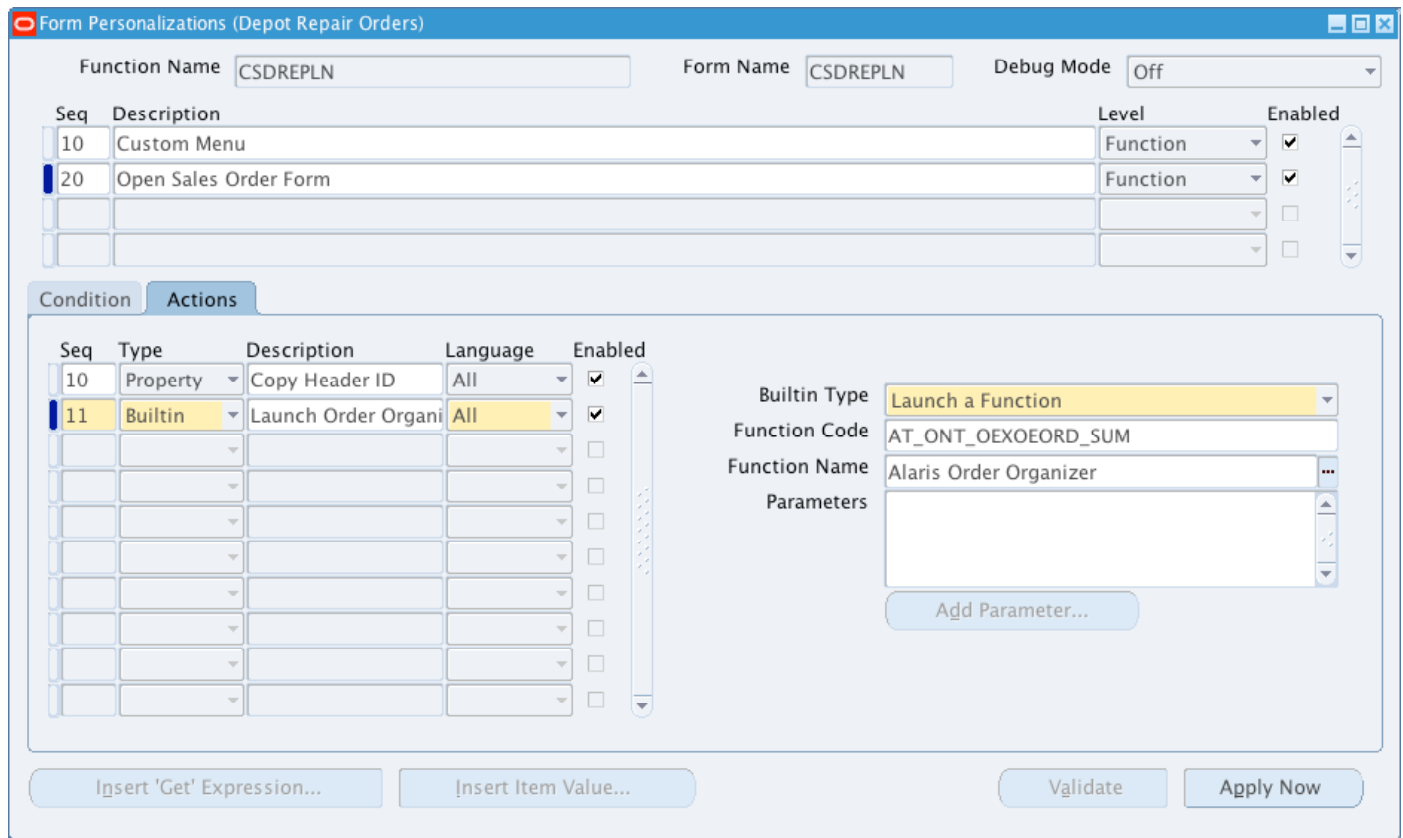
Property Name: VALUE

Value: =:RCV_SHIP.ORDER_NUMBER

Description: This action copies the sales order number from the line, which your cursor resides on in the Logistics tab from the Repair Order form.

Save your work.

Add the next Action line.



The screenshot shows the 'Form Personalizations (Depot Repair Orders)' window. At the top, there are fields for 'Function Name' (CSDREPLN), 'Form Name' (CSDREPLN), and 'Debug Mode' (Off). Below this is a table with columns 'Seq', 'Description', 'Level', and 'Enabled'. The table contains two rows: Seq 10, Description 'Custom Menu', Level 'Function', Enabled checked; and Seq 20, Description 'Open Sales Order Form', Level 'Function', Enabled checked. Below the table are two tabs: 'Condition' and 'Actions'. The 'Actions' tab is active, showing a table with columns 'Seq', 'Type', 'Description', 'Language', and 'Enabled'. The table contains two rows: Seq 10, Type 'Property', Description 'Copy Header ID', Language 'All', Enabled checked; and Seq 11, Type 'Builtin', Description 'Launch Order Organi', Language 'All', Enabled checked. To the right of the table is a configuration panel for the selected action (Seq 11). It has fields for 'Builtin Type' (Launch a Function), 'Function Code' (AT_ONT_OEXOEOORD_SUM), 'Function Name' (Alaris Order Organizer), and 'Parameters'. There is an 'Add Parameter...' button below the parameters field. At the bottom of the window are buttons for 'Insert \'Get\' Expression...', 'Insert Item Value...', 'Validate', and 'Apply Now'.

Enter the following in the Actions table:

Seq: 11

Type: Builtin

Description: launch order organizer

Builtin Type: Launch a Function

Function Code: AT_ONT_OEXOEOORD_SUMMARY

Function Name: Order Organizer

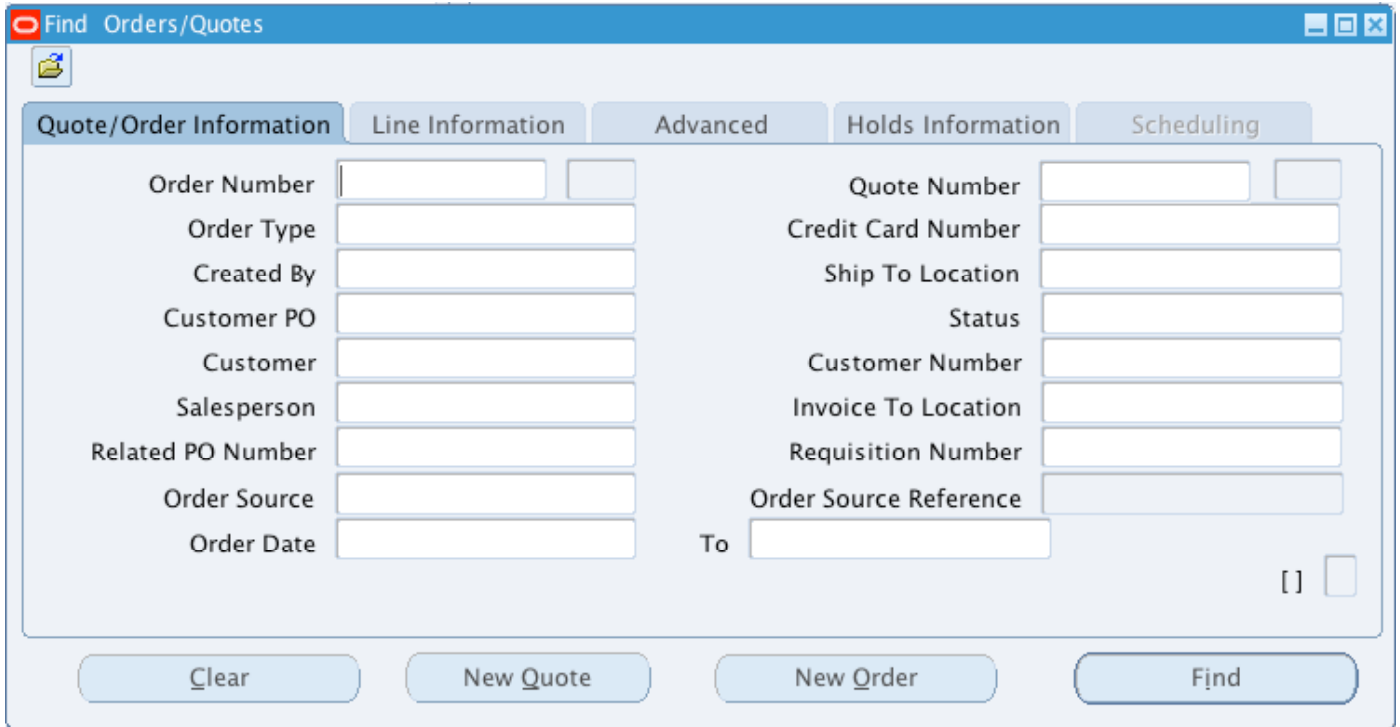
Parameters:

Save your work.

Click Apply Now (button).

This will launch the Order Organizer summary form. Continue on to the next page to configure the personalization for that form.

The following screen appears after selecting "Apply Now" as shown on the previous page:



The screenshot shows a software window titled "Find Orders/Quotes" with a search form. The form is organized into five tabs: "Quote/Order Information", "Line Information", "Advanced", "Holds Information", and "Scheduling". The "Quote/Order Information" tab is currently selected and contains the following fields:

- Order Number:
- Order Type:
- Created By:
- Customer PO:
- Customer:
- Salesperson:
- Related PO Number:
- Order Source:
- Order Date:
- Quote Number:
- Credit Card Number:
- Ship To Location:
- Status:
- Customer Number:
- Invoice To Location:
- Requisition Number:
- Order Source Reference:
- To:

At the bottom of the window, there are four buttons: "Clear", "New Quote", "New Order", and "Find".



Navigate to **Help > Diagnostics > Custom Code > Personalize** to launch the personalization configuration form for this form.

Enter line 10, "Set Value of Order Number for Depot Repair Hot Link" as shown here:

Trigger Event: WHEN-NEW-FORM-INSTANCE

Trigger Object:

Condition: null

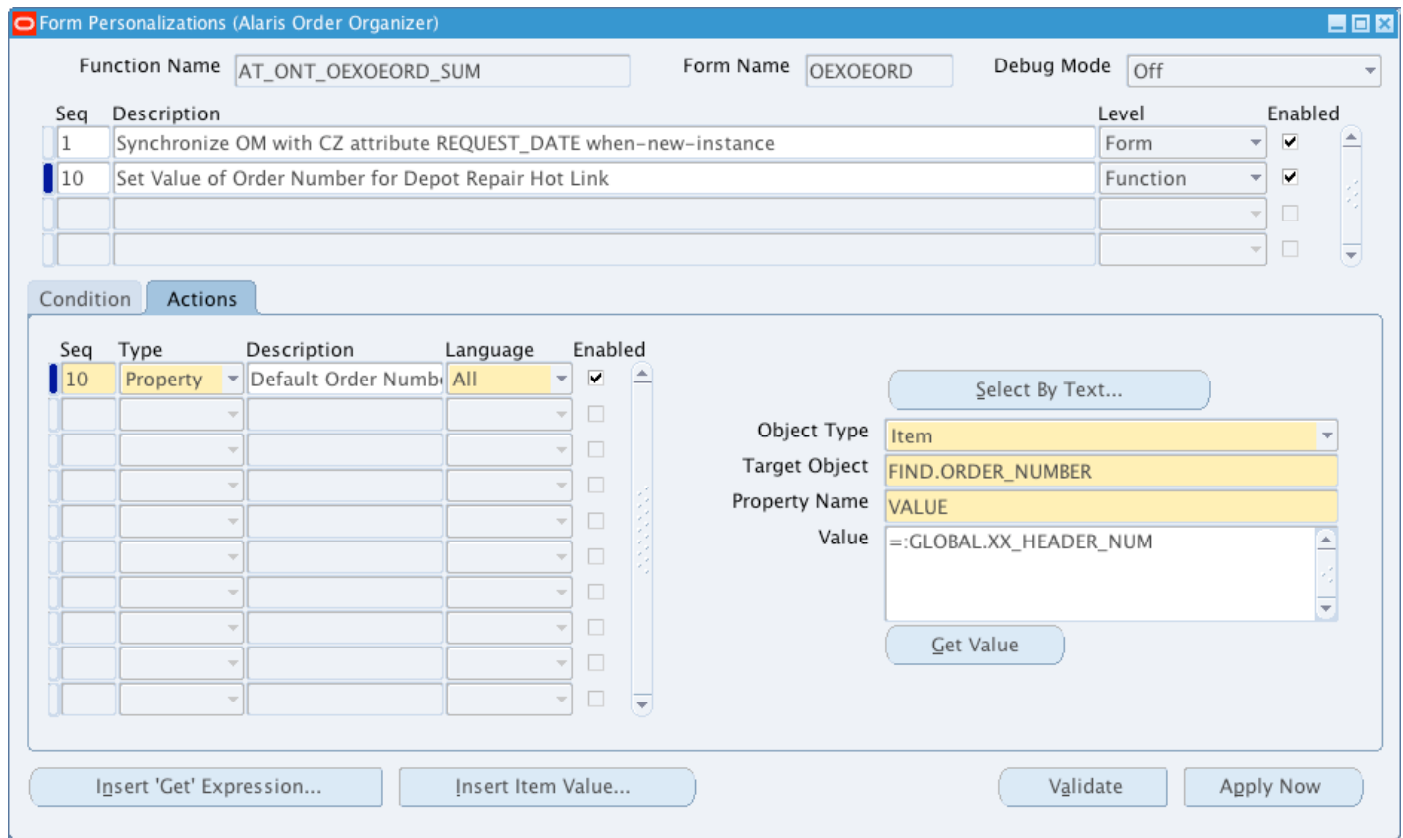
Processing Mode: Not in Enter-Query Mode

Level: Site

Value: N/A

Save your work.

Click on the **Actions** tab.



Function Name: AT_ONT_OEXOEOED_SUM Form Name: OEXOEOED Debug Mode: Off

Seq	Description	Level	Enabled
1	Synchronize OM with CZ attribute REQUEST_DATE when-new-instance	Form	<input checked="" type="checkbox"/>
10	Set Value of Order Number for Depot Repair Hot Link	Function	<input checked="" type="checkbox"/>

Seq	Type	Description	Language	Enabled
10	Property	Default Order Numbr	All	<input checked="" type="checkbox"/>

Object Type: Item
 Target Object: FIND.ORDER_NUMBER
 Property Name: VALUE
 Value: =:GLOBAL.XX_HEADER_NUM

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

Seq: 10

Type: Property

Description: Default Order Number

Object Type: Item

Target Object: FIND.ORDER_NUMBER

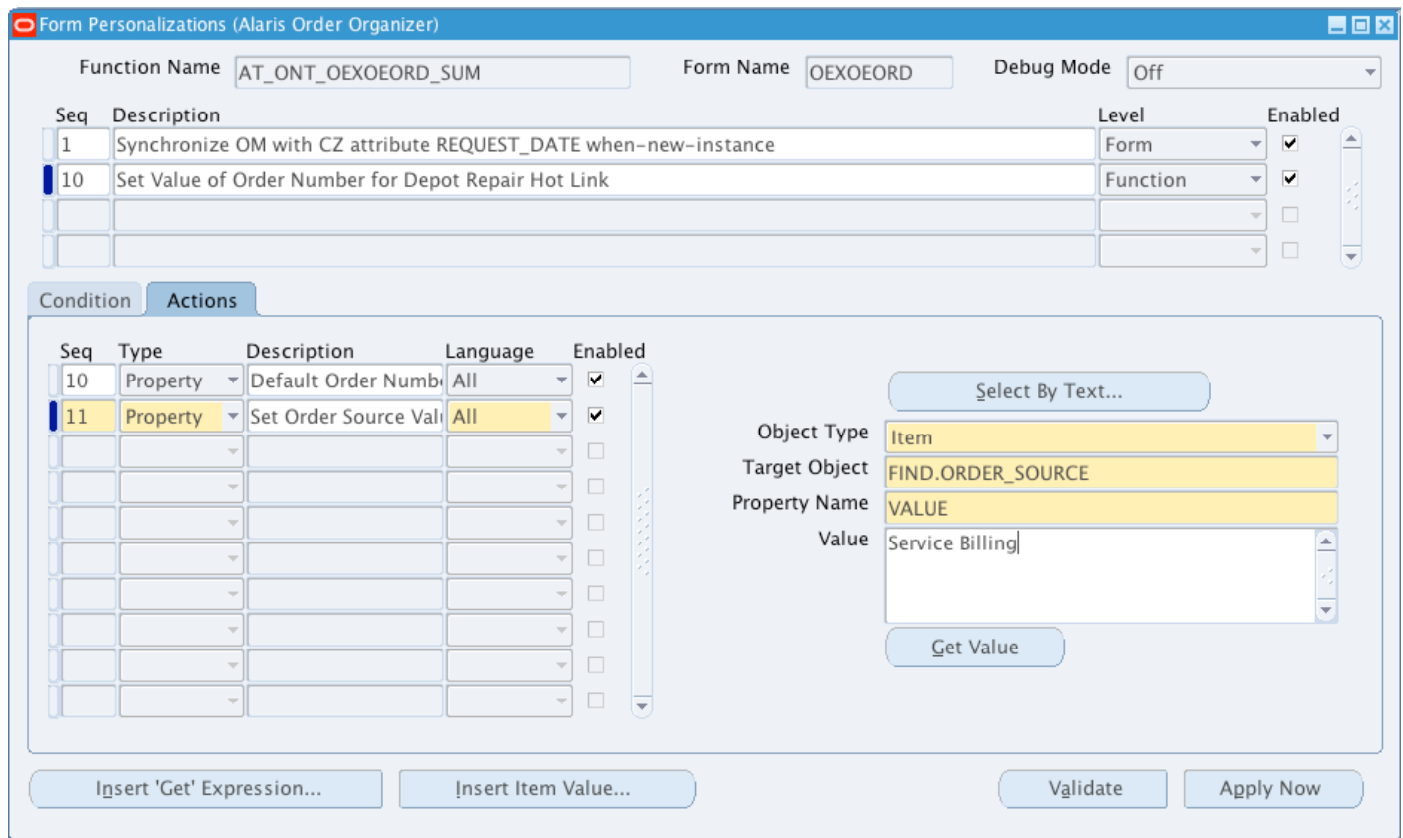
Property Name: VALUE

Value: =:GLOBAL.XX_HEADER_NUM

Description: This action passes the variable, sales order number, to the order organizer when the function is selected to launch in the menu defined earlier.

Save your work.

Add the next Action line.



The screenshot shows the 'Form Personalizations (Alaris Order Organizer)' window. At the top, there are fields for 'Function Name' (AT_ONT_OEXOEOED_SUM), 'Form Name' (OEXOEOED), and 'Debug Mode' (Off). Below this is a table of actions:

Seq	Description	Level	Enabled
1	Synchronize OM with CZ attribute REQUEST_DATE when-new-instance	Form	<input checked="" type="checkbox"/>
10	Set Value of Order Number for Depot Repair Hot Link	Function	<input checked="" type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

Below the table are two tabs: 'Condition' and 'Actions'. The 'Actions' tab is active, showing a table of actions and a configuration panel for action 11:

Seq	Type	Description	Language	Enabled
10	Property	Default Order Numbr	All	<input checked="" type="checkbox"/>
11	Property	Set Order Source Val	All	<input checked="" type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

The configuration panel for action 11 includes:

- Object Type: Item
- Target Object: FIND.ORDER_SOURCE
- Property Name: VALUE
- Value: Service Billing

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

Seq: 11

Type: Property

Description: Set Order Source Value

Object Type: Item

Target Object: FIND.ORDER_SOURCE

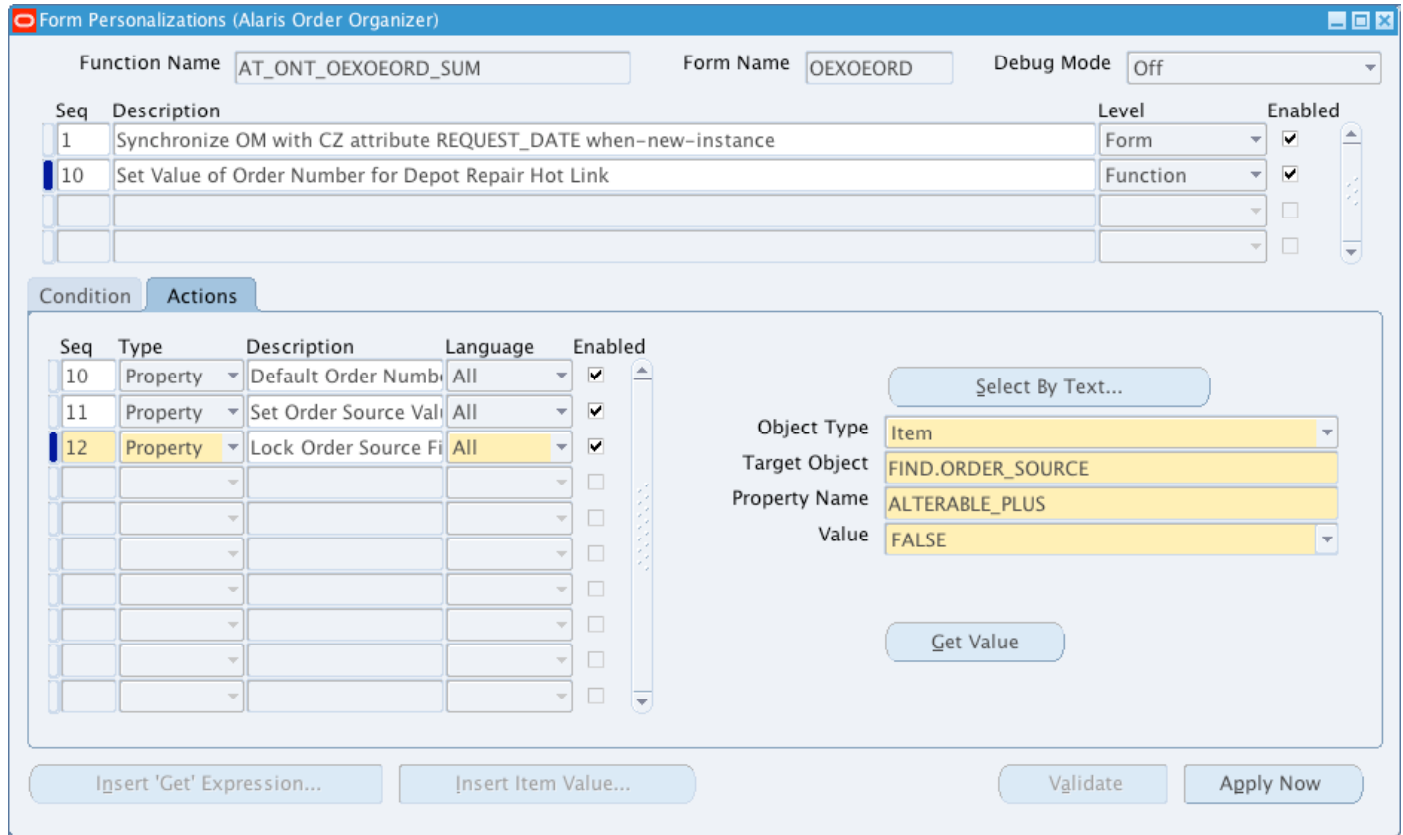
Property Name: VALUE

Value: Service Billing

Description: This action adds an element of security and sets the order source to equal 'Service Billing'. This means the order has originated from the Service modules, i.e., Depot Repair, Teleservice. Optionally setup this action if your requirement is to restrict the Service organization from viewing sales orders created outside the Service modules.

Save your work.

Add the next Action line.



Seq	Description	Level	Enabled
1	Synchronize OM with CZ attribute REQUEST_DATE when-new-instance	Form	<input checked="" type="checkbox"/>
10	Set Value of Order Number for Depot Repair Hot Link	Function	<input checked="" type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

Seq	Type	Description	Language	Enabled
10	Property	Default Order Numb	All	<input checked="" type="checkbox"/>
11	Property	Set Order Source Val	All	<input checked="" type="checkbox"/>
12	Property	Lock Order Source Fi	All	<input checked="" type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

Object Type: Item
 Target Object: FIND.ORDER_SOURCE
 Property Name: ALTERABLE_PLUS
 Value: FALSE

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

Seq: 12

Type: Property

Description: Lock Order Source Field

Object Type: Item

Target Object: FIND.ORDER_SOURCE

Property Name: ALTERABLE_PLUS

Value: FALSE

Description: Building on Sequence 11, this action locks the value of order source to ensure it can be nothing other than 'Service Billing'.

Save your work.



For more information or with questions regarding this document, please email Steve Salomonsson at ssalomonsson@alaristechnology.com.