

How to migrate personalization on OAF pages

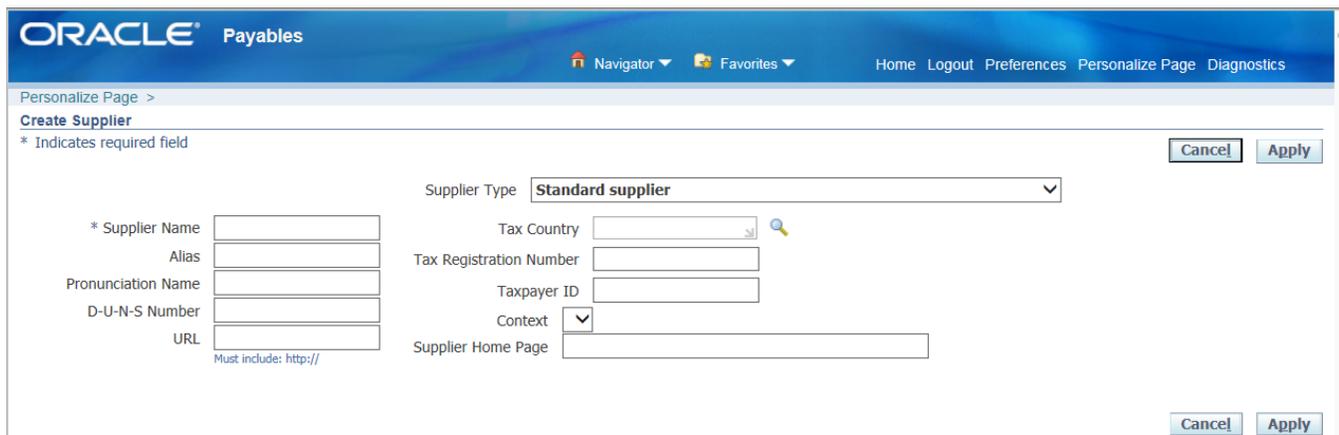
In other articles I have mentioned how to personalize OAF pages. Now we shall discuss how personalization is migrated from one instance to another.

We shall migrate the personalization we had developed in previous articles. The migration steps are given below.

Step 1: Retrieve the page hierarchy

We shall identify where and which the personalization will be migrated.

Navigate to the OAF Page on which personalization is done. In our case the page is Supplier Create page.



The screenshot shows the Oracle Payables 'Create Supplier' page. The page title is 'Create Supplier' and it includes a note '* Indicates required field'. The form contains several input fields: Supplier Name (required), Alias, Pronunciation Name, D-U-N-S Number, URL (with a note 'Must include: http://'), Supplier Type (set to 'Standard supplier'), Tax Country, Tax Registration Number, Taxpayer ID, Context (a dropdown menu), and Supplier Home Page. The page also features navigation links for Home, Logout, Preferences, Personalize Page, and Diagnostics, along with 'Cancel' and 'Apply' buttons.

The notable personalizations done on this page are,

- The prompt, **Name Pronunciation**, has been changed to **Pronunciation Name**.
- The Field **Context Value** has been hidden

/oracle/apps/pos/supplier/webui/SuppCrtPG

The personalizations have been done at Different levels. So we need to export the personalization done at this levels

To check the personalizations on an OAF page you can execute a PL/SQL code in the database.

```
BEGIN
jdr_utils.listcustomizations ('/oracle/apps/pos/supplier/webui/SuppCrtPG');
```

END;

The output will look like the following,

```
/oracle/apps/pos/supplier/webui/customizations/function/POS_HT_SP_B_ORG_CRT/SuppCrtPG
```

```
/oracle/apps/pos/supplier/webui/customizations/site/0/SuppCrtPG
```

Step 2: Download the personalization

Now we shall download the personalization after locating it on the repository.

Create a Staging directory in the server with full permissions

Change the Profile Value to the newly created Staging Directory

Profile Name : **FND: Personalization Document Root Path**

Go to Functional Administrator Responsibility => Personalization => Import/Export

Then drill down as per the page hierarchy to found the below 2 files which you by running the list customizations.

```
/oracle/apps/pos/supplier/webui/customizations/function/POS_HT_SP_B_ORG_CRT/SuppCrtPG
```

```
/oracle/apps/pos/supplier/webui/customizations/site/0/SuppCrtPG
```

Then select these page as shown below.

<input type="checkbox"/>		function	/oracle/apps/pos/supplier/webui/customizations/function	
<input type="checkbox"/>		POS_HT_SP_B_ORG_CRT	/oracle/apps/pos/supplier/webui/customizations/function/POS_HT_SP_B_ORG_CRT	
<input checked="" type="checkbox"/>		SuppCrtPG	/oracle/apps/pos/supplier/webui/customizations/function/POS_HT_SP_B_ORG_CRT/SuppCrtPG	16-April-2016
<input type="checkbox"/>		site	/oracle/apps/pos/supplier/webui/customizations/site	
<input type="checkbox"/>		0	/oracle/apps/pos/supplier/webui/customizations/site/0	
<input checked="" type="checkbox"/>		SuppCrtPG	/oracle/apps/pos/supplier/webui/customizations/site/0/SuppCrtPG	16-April-2016
<input type="checkbox"/>		pqh	/oracle/apps/pqh	
<input type="checkbox"/>		customizations	/oracle/apps/pqh/customizations	
<input type="checkbox"/>		selfservice	/oracle/apps/pqh/selfservice	
<input type="checkbox"/>		pqp	/oracle/apps/pqp	
<input type="checkbox"/>		vehiclemileage	/oracle/apps/pqp/vehiclemileage	
<input type="checkbox"/>		prp	/oracle/apps/prp	
<input type="checkbox"/>		common	/oracle/apps/prp/common	
<input type="checkbox"/>		proposal	/oracle/apps/prp/proposal	
<input type="checkbox"/>		pv	/oracle/apps/pv	
<input type="checkbox"/>		common	/oracle/apps/pv/common	
<input type="checkbox"/>		qot	/oracle/apps/qot	
<input type="checkbox"/>		quote	/oracle/apps/qot/quote	
<input type="checkbox"/>		wip	/oracle/apps/wip	
<input type="checkbox"/>		workstation	/oracle/apps/wip/workstation	
<input type="checkbox"/>		wsm	/oracle/apps/wsm	
<input type="checkbox"/>		mes	/oracle/apps/wsm/mes	
<input type="checkbox"/>		xla	/oracle/apps/xla	
<input type="checkbox"/>		linesinquiry	/oracle/apps/xla/linesinquiry	
<input type="checkbox"/>		zx	/oracle/apps/zx	
<input type="checkbox"/>		taxintegration	/oracle/apps/zx/taxintegration	

Select Personalization Documents or Package: [Export to File System](#) [Delete](#)

Click on the button, **Export to File System**.

Now you will get a message as shown in the below screen,

The screenshot shows the Oracle Applications Administration interface. The top navigation bar includes 'ORACLE Applications Administration', 'Navigator', 'Favorites', 'Home', 'Logout', 'Preferences', 'Personalize Page', and 'Diagnostics'. The main menu has 'Security', 'Core Services', 'Personalization', 'File Manager', and 'Portletization'. The 'Personalization' section is active, showing 'Application Catalog' and 'Import/Export'. Under 'Personalization Repository', there is an 'Exported Personalizations' section with a message: 'Exported 2 document(s) to /Mokshith/Files/Personalizations/Perz successfully. /oracle/apps/pos/supplier/webui/customizations/function/POS_HT_SP_B_ORG_CRT/SuppCrtPG /oracle/apps/pos/supplier/webui/customizations/site/0/SuppCrtPG'. An 'OK' button is visible at the bottom right of the message area.

Information Documents Exported.

Exported 2 document(s) to /Mokshith/Files/Personalizations/Perz successfully.
 /oracle/apps/pos/supplier/webui/customizations/function/POS_HT_SP_B_ORG_CRT/SuppCrtPG
 /oracle/apps/pos/supplier/webui/customizations/site/0/SuppCrtPG

Get the files into your local machine from server to verify the personalization's.

Give these folder to DBA to Migrate.

Create a Staging Directory with full permissions in the destination server

Change the Profile Value to the newly created Staging Directory

Profile Name : **FND: Personalization Document Root Path**

Go to Functional Administrator Responsibility => Personalization => Import/Export

Click on Select all

Click on Export to File System

The screenshot shows the Oracle Applications Administration interface for Personalization. The top navigation bar includes 'ORACLE Applications Administration' and various utility links like 'Home', 'Logout', 'Preferences', 'Help', 'Personalize Page', and 'Diagnostics'. Below this, there are tabs for 'Security', 'Core Services', 'Personalization', 'File Manager', and 'Portletization'. The 'Personalization' tab is active, and the sub-tab is 'Import/Export'. On the left, there is a 'Personalization Repository' sidebar with 'Exported Personalizations' listed. The main content area is titled 'Personalization Repository' and contains a search section with fields for 'Application', 'Document Path', and 'Last Updated' (with 'From' and 'To' sub-fields). Below the search fields, there is a 'Go' button and a descriptive paragraph. Underneath, there are buttons for 'Export to File System' and 'Delete'. At the bottom, there are 'Select All' and 'Select None' options. A table lists personalization packages with columns for 'Select Focus', 'Personalization Repository', 'Path', and 'Last Updated'. All items in the table have a checked checkbox in the 'Select Focus' column.

Select Focus	Personalization Repository	Path	Last Updated
<input checked="" type="checkbox"/>	oracle	/oracle	
<input checked="" type="checkbox"/>	apps	/oracle/apps	
<input checked="" type="checkbox"/>	ams	/oracle/apps/ams	
<input checked="" type="checkbox"/>	campaign	/oracle/apps/ams/campaign	
<input checked="" type="checkbox"/>	ap	/oracle/apps/ap	
<input checked="" type="checkbox"/>	customizations	/oracle/apps/ap/customizations	
<input checked="" type="checkbox"/>	invoice	/oracle/apps/ap/invoice	
<input checked="" type="checkbox"/>	oie	/oracle/apps/ap/oie	
<input checked="" type="checkbox"/>	ar	/oracle/apps/ar	
<input checked="" type="checkbox"/>	bpa	/oracle/apps/ar/bpa	
<input checked="" type="checkbox"/>	creditmgt	/oracle/apps/ar/creditmgt	

This will take the backup for all the existing personalization's of your destination system.

Create a Staging Directory with full permissions in the destination server

Please the folder with the newly created personalization's in this staging directory

Change the Profile Value to the newly created Staging Directory

Profile Name : **FND: Personalization Document Root Path**

Go to Functional Administrator Responsibility => Personalization => Import/Export => Exported Personalization's

Then drill down as per the page hierarchy to found the below 2 files which you got by running the list customizations.

**/oracle/apps/pos/supplier/webui/customizations/function/POS_HT_SP_B_ORG_CR
T/SuppCrtPG**

/oracle/apps/pos/supplier/webui/customizations/site/0/SuppCrtPG

Then select these page as shown below.

ORACLE Applications Administration

Security Core Services Personalization File Manager Portletization

Application Catalog | Import/Export

Exported Personalizations

Expand nodes to hierarchically browse all administrator level personalizations that have been exported to the file system. Base documents will not appear in this list. If an import is performed by selecting a package, it will apply to all packages and documents contained within the selected package.

Select Personalization Documents or Package: [Import from File System](#)

Select All | Select None

Select Focus Exported Personalizations		Last Updated
<input type="checkbox"/>	Document Root - /Mokshith/Files/Personalizations/Perz/	
<input type="checkbox"/>	oracle	
<input type="checkbox"/>	apps	
<input type="checkbox"/>	pos	
<input type="checkbox"/>	supplier	
<input type="checkbox"/>	webui	
<input type="checkbox"/>	customizations	
<input type="checkbox"/>	function	
<input type="checkbox"/>	POS_HT_SP_B_ORG_CRT	
<input checked="" type="checkbox"/>	SuppCrtPG.xml	16-April-2016
<input type="checkbox"/>	site	
<input type="checkbox"/>	0	
<input checked="" type="checkbox"/>	SuppCrtPG.xml	16-April-2016

Select Personalization Documents or Package: [Import from File System](#)

Security Core Services Personalization File Manager Portletization Home Logout Preferences Help Personalize Page Diagnostics

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Click on **Import from File System**

The screenshot shows the Oracle Applications Administration web interface. The top navigation bar includes the Oracle logo, 'Applications Administration', and links for 'Home', 'Logout', 'Preferences', 'Personalize Page', and 'Diagnostics'. Below this, there are tabs for 'Security', 'Core Services', 'Personalization', 'File Manager', and 'Portletization'. The 'Personalization' tab is active, and the 'Import/Export' sub-tab is selected. The main content area displays a 'Confirmation' message: 'Documents imported' followed by 'Imported 2 documents from file system successfully.' and two file paths: '/oracle/apps/pos/supplier/webui/customizations/function/POS_HT_SP_B_ORG_CRT/SuppCrtpg.xml' and '/oracle/apps/pos/supplier/webui/customizations/site/0/SuppCrtpg.xml'. An 'OK' button is located at the bottom right of the message area. The footer contains 'About this Page', 'Privacy Statement', and 'Copyright (c) 2006, Oracle. All rights reserved.'

Bounce the Application

Now Execute the below statement in Toad to verify the imported personalization's

```
BEGIN  
jdr_utils.listcustomizations ('/oracle/apps/pos/supplier/webui/SuppCrtpg');  
END;
```

The output will look like the following,

```
/oracle/apps/pos/supplier/webui/customizations/function/POS_HT_SP_B_ORG_CRT/Su  
ppCrtpg  
/oracle/apps/pos/supplier/webui/customizations/site/0/SuppCrtpg
```

Now Navigate to your page to see the changes.