Oracle® Applications

User's Guide

Release 11*i*

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Oracle Applications User’s Guide, Release 11*i*

Part No. B10935-05

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- Do you need different information or graphics? If so, where, and in what format?
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Preface

Intended Audience

Welcome to Release 11*i* of the *Oracle Applications User's Guide*.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Computer desktop application usage and terminology

If you have never used Oracle Applications, we suggest you attend one or more of the Oracle Applications training classes available through Oracle University.

See Related Documents on page viii for more Oracle Applications product information.

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Structure

1 Getting Started with Oracle Applications
2 Forms-Based Applications
3 HTML-Based Applications

Related Documents

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Applications.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using an Oracle Applications form can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

1

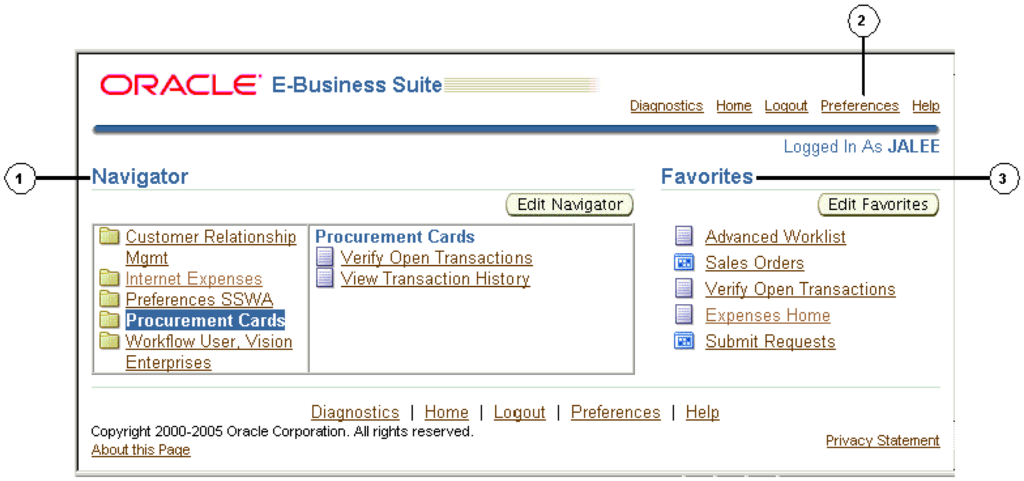
Getting Started with Oracle Applications

Introduction

Oracle E-Business Suite is a complete set of business applications for managing and automating processes across your enterprise. This guide describes the user interface features that are common to Oracle E-Business Suite applications, including:

- List of Values (LOV), page 2-5
- Flexfields, page 2-6
- Search (Query) functions, page 2-8
- Folders, page 2-9
- Concurrent Requests, page 2-10
- Export, page 2-15
- Attachments, page 2-15
- User Profile Options, page 2-16

Getting Started



2
ORACLE E-Business Suite
Diagnostics
Home
Logout
Preferences
Help
Logged In As JALEE
1
Navigator
Favorites
3
Edit Navigator
Edit Favorites
Customer Relationship Mgmt
Internet Expenses
Preferences SSWA
Procurement Cards
Workflow User, Vision Enterprises
Procurement Cards
Verify Open Transactions
View Transaction History
Advanced Worklist
Sales Orders
Verify Open Transactions
Expenses Home
Submit Requests
Diagnostics | Home | Logout | Preferences | Help
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About this Page
Privacy Statement

The **E-Business Suite Home** page is your entry point to Oracle E-Business Suite. From this page you can:

1. Access E-Business Suite functions from the **Navigator.**

2. Set **Preferences**.
3. Navigate to frequently-used functions or Web pages from **Favorites**.

Access E-Business Suite Functions

Use the **Navigator** to access Oracle E-Business Suite functions grouped by responsibility.

> **Note:** A *responsibility* is a level of authority in Oracle E-Business Suite. It enables your access to those functions and data appropriate for your enterprise role. You can have one or more responsibilities.

To access a function:

1. Select a responsibility to view its menu of functions.
2. Select the function to launch it.

To add or delete functions shown in the **Navigator** from all functions available to you, select **Edit Navigator.**

Two Types of Interfaces

Oracle E-Business Suite applications are either Forms-based or HTML-based. Forms-based applications are optimized for processing a large volume of transactions. HTML-based applications, sometimes referred to as "self-service applications", are optimized for ease of first-time use. For example, to enter a batch of journals, the E-Business Suite provides a Forms-based application. To submit an expense report, the E-Business Suite provides an HTML-based application.

Forms-based functions open the Oracle Applications **Navigator**. For more information about the **Navigator** window, see Using Forms-Based Applications, page 2-1.

For more information about HTML-based applications, see Using HTML-Based Applications, page 3-1.

Set Preferences

Select **Preferences** to set personal options. Options include language, territory, time zone, notification style, accessibility setting, and formats for dates and numbers. You can also reset your password from the **Preferences** page.

Optionally specify a Start Page for all future sessions from available pages (organized by responsibility).

> **Note:** From the Forms interface, change your Start Page using the "Applications Start Page" profile option.

Set additional preferences using user profile options. For more information, see Defining Preferences with User Profile Options, page 2-16.

Navigate to Frequently-Used Functions

Customize your **Favorites** by adding links to frequently-used functions and Web sites.

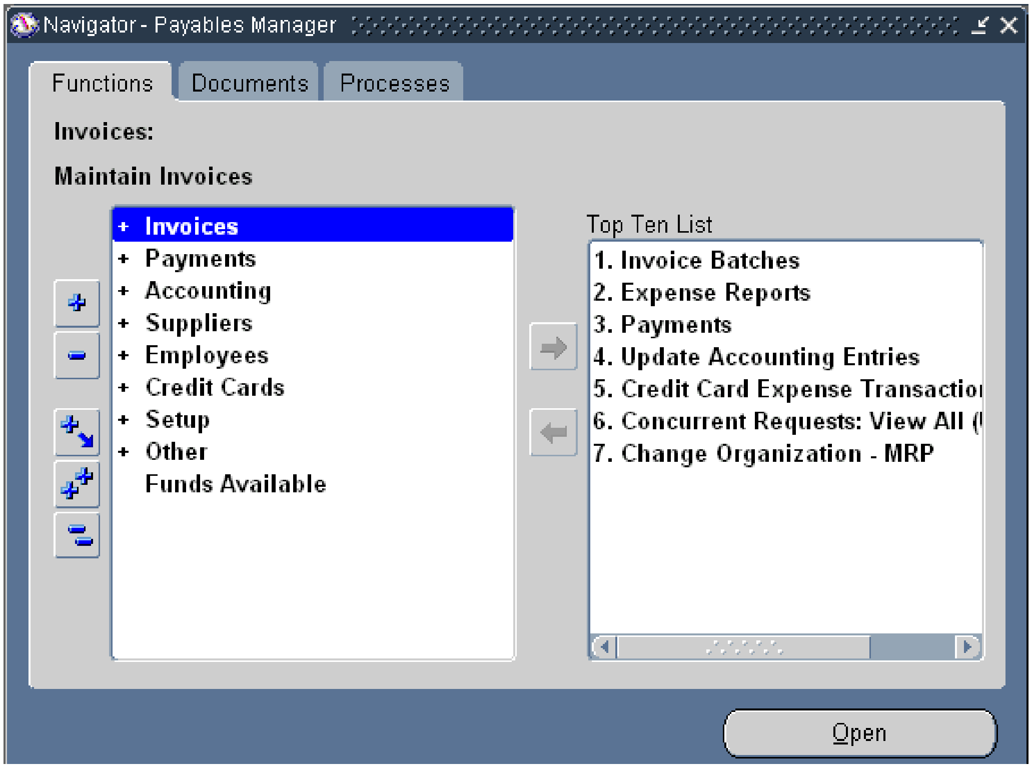
To add or remove links, select **Edit Favorites.**

2

Forms-Based Applications

Using Forms-Based Applications

The Navigator


Navigator - Payables Manager
Functions
Documents
Processes
Invoices:
Maintain Invoices
+ Invoices
+ Payments
+ Accounting
+ Suppliers
+ Employees
+ Credit Cards
+ Setup
+ Other
Funds Available
Top Ten List
1. Invoice Batches
2. Expense Reports
3. Payments
4. Update Accounting Entries
5. Credit Card Expense Transactio
6. Concurrent Requests: View All (
7. Change Organization - MRP
Open

From the **Navigator** you can:

- Open forms from the **Functions** tab.
- Link to documents from the **Documents** tab.
- Launch business processes from the **Processes** tab.

Open Forms:

The **Functions** tab provides links to the forms accessible to your current responsibility.

To open a form, expand the function heading and double-click the form name.

Create a Top Ten List :

Add forms that you use frequently to your **Top Ten List**. Create a different top ten list for each of your responsibilities.

To add a form to the Top Ten List

1. Select the form, then select the **Add to List** button.

To remove a form from the Top Ten List

1. Select the form, then select the **Remove from List** button.

Create Links to Documents:

Create links to documents that you are working on for faster access. The **Documents** tab allows you to save as many links as you want. View the saved links as a list or as icons.

To add a document that is currently open

1. Choose **Place on Navigator** from the **File** menu

   Important: The **Place on Navigator** command is not enabled for all forms.

To rename a link that you have created

1. Select its name (or icon) and select the **Rename** button.
2. Enter the new name in the **Rename Label** window and click **OK**.

To remove a document from the Documents tab

1. Select its name (or icon) and select the **Remove** button.

Launch Business Processes:

The **Processes** tab contains interactive step-by-step maps of business processes. Each step is a form or report that you can launch directly from the process map.

Each time you launch a business process, you create an instance of that process and assign it a name. As you complete each step in a process, the map is updated accordingly.

To open a process

1. Select the process, then select the **Launch** button.
2. Enter a name for the new instance.

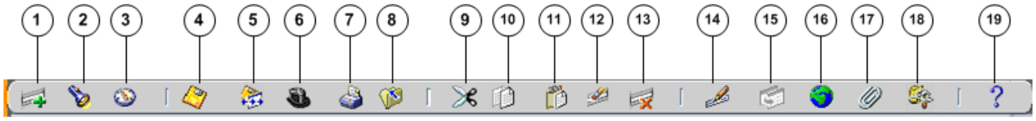
   The instance remains active until you complete or cancel it. The **Processes** tab lists your active instances.

Working in a Process Instance

The active step has a box drawn around it. More than one step can be active if your process contains multiple paths.

- Click once on a step icon to display a description of the step.
- Double-click on a step icon to open the related form.
- Advance to the next step of a process from within a form by using the **Next Step** toolbar icon.

The Forms Toolbar

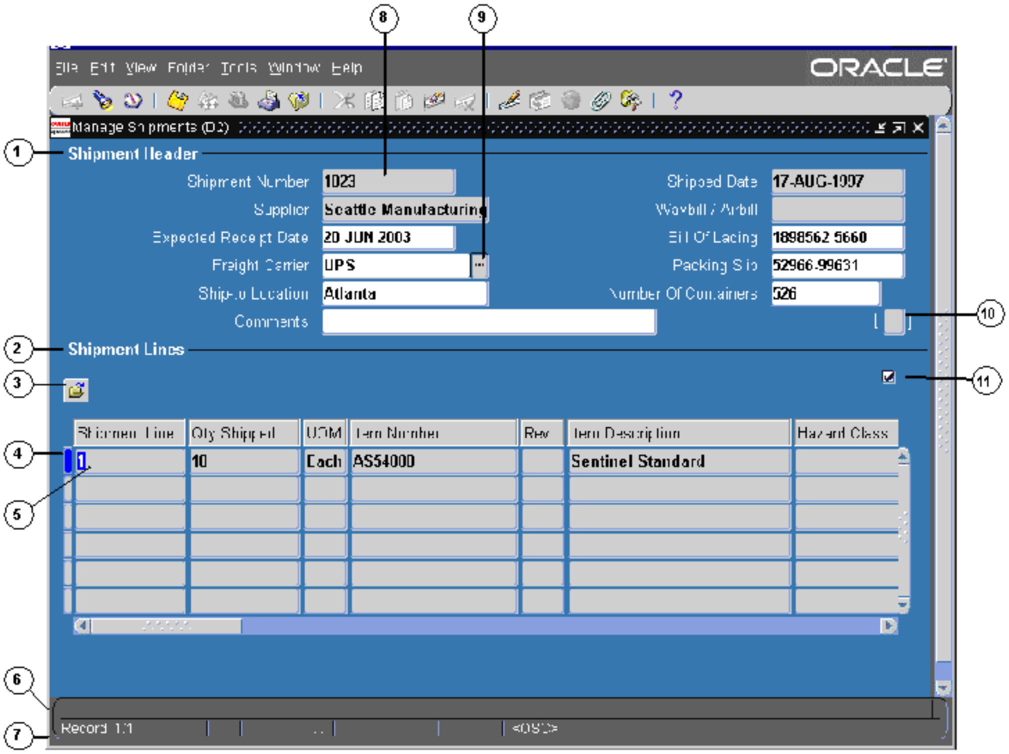


The toolbar icons and the actions they perform are as follows:

1. The **New** icon opens a new record.
2. The **Find...** icon invokes the **Find** window.
3. The **Show Navigator** icon invokes the **Navigator** window.
4. The **Save** icon saves your data.
5. The **Next Step** icon advances you to the next step of a process (see Launch Business Processes, page 2-2).
6. The **Switch Responsibilities** icon invokes the list of your responsibilities for you to choose another.
7. The **Print...** icon prints the current screen. In some cases it may print a report associated with the current data.
8. The **Close Form** icons closes all windows of the current form.
9. The **Cut** icon cuts the current selection to the clipboard.
10. The **Copy** icon copies the current selection to the clipboard.
11. The **Paste** icon pastes from the clipboard into the current field.
12. The **Clear Record** icon erases the current record from the form.
13. The **Delete** icon deletes the current record from the database.
14. The **Edit Field...** icon displays the **Editor** window for the current field.
15. The **Zoom** icon invokes customer-defined drill-down behavior.
16. The **Translations...** icon invokes the **Translations** window (see Creating Translations for a Record, page 2-7).
17. The **Attachments** icon invokes the **Attachments** window. If attachments already exist, the icon appears as a paperclip holding paper (see Attachments, page 2-15).
18. The **Folder Tools** icon invokes the **Folder Tools** palette window (see Customizing the Presentation of Data, page 2-9).
19. The **Window Help** icon invokes online help for the current window.

Entering Data in Forms

Use the following form components to enter and query data:



Shipment Header

Shipment Number 1023
Supplier Seattle Manufacturing
Expected Receipt Date 20 JUN 2003
Freight Carrier UPS
Ship-to Location Atlanta
Comments
Shipped Date 17-AUG-1997
Waybill / Airbill
Bill Of Lading 1898562 5660
Packing Slip 52966-99631
Number Of Containers 526

Shipment Lines

Shipment Line	Qty Shipped	UOM	Item Number	Rev	Item Description	Hazard Class
1	10	Each	AS54000		Sentinel Standard	

1. Single-Row Block
2. Multi-Row Block
3. Folder Indicator
4. Current Record Indicator
5. Record
6. Message Line
7. Status Line
8. Field
9. List of Values Indicator
10. Descriptive Flexfield
11. Master-Detail Coordination Box

Organization of a Form

Field

Use fields to enter, view, update, or delete information.

By default, a required field is displayed in yellow, and a read-only field is displayed in gray. These colors can be changed or turned off using profile options. See Defining Preferences with User Profile Options, page 2-16.

In some cases, the display size of a field is too small to show the entire field contents. Use the **Edit Field** toolbar icon to view and update these fields.

Record

A record is a logical grouping of fields. A record is also referred to as a row or a transaction, since one record corresponds either to a row in a database table or to a transaction.

You must complete all required fields in a record before moving to the next record.

> **Note:** If you unintentionally enter a record and cannot advance your cursor, clear the record. From the **Edit** menu, choose **Clear**, then **Record**.

Block

A block displays a set of records either in a single-row format or a multi-row format.

To clear data at the block level: From the **Edit** menu, choose **Clear**, then **Block**.

Creating and Deleting Records

To create a record:

1. Choose **New** from the **File** menu, or use the **New** toolbar icon.
2. After entering data for your new record, choose **Save** or **Save and Proceed** from the **File** menu to save the record to the database. Choosing **Save and Proceed** automatically advances you to the next record.

To delete a record:

1. Choose **Delete** from the **Edit** menu.

   This action erases the current record from your screen, and returns your cursor to the first field of the next record.

2. To delete the record from the database, choose **Save** or **Save and Proceed** from the **File** menu.

Using a List of Values (LOV)

A field that has a predefined list of valid values displays an LOV icon. Select this icon to view the valid field values.

If a list contains more than 100 values, you are prompted to enter a **Find** string to limit the list.

To choose a value from a list:

Select a value, or reduce the list using one of the following methods:

- Without placing your cursor in the **Find** field, type the initial character(s) of a value to *autoreduce* the list to those items matching the characters entered. Use the Backspace key to re-expand the list. If your entry reduces the list to a single value, the list window closes and inserts the value into the field.

  > **Note:** Lists that require a **Find** string do not use the autoreduce feature.

- In the list window, enter any group of characters in the **Find** field and select the **Find** button.

Note: Use the wildcard character (%) to represent any number of characters, and the underline (_) to represent a single character. Do not enter a wildcard character by itself. This will match all records.

Power List

Power List enables you to enter a search string or partial value in an LOV field without opening the list window.

To use Power List

Enter the initial characters of a value in the field and press the Tab key. Power List completes the entry for you.

Your entry can include wildcard characters.

If more than one value matches the characters you specify, a list window opens containing those values.

Advanced Data Entry Features

Master-Detail Relations

A *Master-Detail relation* is an association between two records. An example is the relationship between the **Batch** and **Journals** records in Oracle General Ledger. Each batch (master record) is associated with a set of journal entries (detail records).

Some master-detail blocks contain a coordination check box that allows you to choose whether detail records are queried. Select the master-detail coordination check box to automatically coordinate the update of records between the master and detail blocks. If you deselect the check box, the detail data is not displayed until you move your cursor into the detail block.

Drill-Down Indicators

Some records provide additional details in separate, *drill-down* windows.

A wide-width current record indicator designates that a record provides drill-down information. Double-click the indicator to open the detail window.

Flexfields

A *flexfield* is a flexible data field that can be customized by your enterprise. Oracle E-Business Suite uses two types of flexfields:

- Key flexfield - a field you customize to enter multi-segment values, such as part numbers or account numbers.
- Descriptive flexfield - a field you customize to enter additional information not provided by Oracle E-Business Suite.

Key Flexfields

A key flexfield is composed of *segments*, where each segment has both a value and a meaning. For example, an Accounting Flexfield can be composed of segments that represent Company, Department, and Account. The segments are delimited by a segment separator (usually a "." or a "-").

A *range flexfield* is a type of key flexfield in which you can input a low and a high value for each segment to express a range of combinations.

Entering Data in a Key Flexfield

A key flexfield looks like any other field. You can enter the segments directly or use the **Flexfield** window to enter each segment separately.

To enter data directly into a key flexfield:

1. Enter the segment values, separating each with the segment separator.

To enter data using the flexfield window:

1. Select the **List of Values** icon to open the flexfield window, or select the **Edit Field...** toolbar icon.
2. Enter a value for each segment, or use the list of values where available.
3. Select the **Combinations** button in the flexfield window to search the list of existing segment combinations.

To enter data in a range flexfield:

Enter a **Low** and a **High** value for each segment, or use the list of values where available.

Descriptive Flexfields

A descriptive flexfield appears as a two-character, unnamed field enclosed in brackets.

Move your cursor into the bracketed field to open the descriptive flexfield window. The window contains segments that make up the descriptive flexfield. Each segment can have a list of values.

Entering Data in a Descriptive Flexfield

To enter data in a descriptive flexfield:

1. Open the descriptive flexfield window. If your profile option Flexfields:Open Descr Window is set to "No", or if you are in a folder, select the **Edit Field...** toolbar icon to open the flexfield window.

   > **Note:** For more information on profile options, see Defining Preferences with Personal Profile Options, page 2-16.

2. Enter a value for each segment, or use the list of values where available. Default values can be overwritten.

Creating Translations for a Record

Windows that allow the entry of records in multiple languages display the enabled **Translations...** toolbar icon.

To enter a translation for a record:

1. Select the record you wish to translate.
2. Select the **Translations...** icon from the toolbar.

   The **Translations** window opens, with translatable fields displayed in columns. The installed languages are displayed in rows.

3. Enter translations for the displayed fields.

Using Keyboard Help

Use keystroke combinations to perform many menu functions.

To view the list of functions and keystroke combinations:

1. Choose **Keyboard Help...** from the **Help** menu.

Searching for Data

To query records in your current block or window, use the **Find** command or **Query by Example**.

The Find Command

The **Find** command displays a window in which you can specify search criteria. Depending on the block that you invoke **Find** from, one of two types of windows appears:

- A *find* window that contains fields for entering search criteria.
- A *list* window that shows all possible records that you can retrieve for the block.

Generally, a find window appears for a multi-record block, while a list window appears for a single-record block.

Using the Find Command

1. Choose **Find...** from the **View** menu or select the **Find** toolbar icon.
    - If a list window appears:
        - Use a list window as you would an LOV window. SeeUsing a List of Values (LOV), page 2-5.
    - If a find window appears:
        1. Enter as many search criteria as you can.
        2. Select the **Find** button.

Query by Example

To retrieve a group of records based on more sophisticated search criteria than **Find** allows, use **Query by Example**. **Query by Example** allows you to specify search criteria in any of the queryable fields in the current block. The search criteria can include specific values, phrases containing wildcard characters, or query operators.

If you do not need to retrieve the records, but only want to know how many records match your search criteria, perform a query count.

To use Query by Example:

1. From the **View** menu, choose **Query by Example,** then **Enter**.

    This action switches your window from data entry mode to Enter Query mode. Queryable fields are displayed in blue.

2. Enter search criteria in the queryable fields (fields may be case-sensitive). To reuse criteria from your last search: From the **View** menu, choose **Query by Example**, then **Show Last Criteria**.

Important: In Enter Query mode, all check boxes are initially in a null state. To use a check box as a search criterion, you must explicitly check or uncheck it.

3. To perform the search: From the **View** menu, choose **Query by Example**, then **Run**.
4. To exit Enter Query mode without searching: From the **View** menu, choose **Query by Example**, then **Cancel**.

To perform a query count:

1. Perform steps 1 and 2 from the previous task: "To use **Query by Example**."
2. From the **View** menu, choose **Query by Example**, then **Count Matching Records**. The window’s message line displays the number of matching records.

Query Operators

The following table shows the query operators for most fields, their meanings, and an example expression:

Query Operators

Operator	Meaning	Example Expression
=	equals	= ’Janet’, = 107
!=	is not	!= ’Bob’, != 109
>	greater than	> 99.1, > ’01-JAN-04’
>=	at least	>= 55
<	less than	< 1000.00
<=	at most	<= 100
#BETWEEN	between two values	#BETWEEN 1 AND 1000

Customizing the Presentation of Data

Folder blocks allow you to personalize a form. You can define a query, customize the layout of the form columns, and then save the query and layout in a folder definition that can be retrieved later.

Folder blocks display an **Open Folder** button. When you move the cursor into a folder block, you enable the **Folder Tools** toolbar icon and the **Folder** menu.

Important: If your system administrator sets the profile option Folders: Allow Customization to "No", you cannot create or customize folders. The only item available from the **Folder** menu is **Open**, to open a predefined folder. For more information about profile options, see Defining Preferences with User Profile Options, page 2-16.

Defining Query Criteria for a Folder

To define query criteria for a folder:

1. Run a query, either by using the **Find** command or **Query By Example**.
2. Save your query criteria by choosing **Save As** from the **Folder** menu.
3. Enter a name for the folder.
4. Select **Always, Never**, or **Ask Each Time** from the **Autoquery** option group to define how frequently to perform the saved query.
5. Select the **Open as Default** check box to set this folder definition as the default every time you navigate to this form.
6. Select the **Public** check box to allow other users to access your folder definition. Selecting **Public** does not enable other users to modify your folder.
7. Select the **Include Query** check box to include your query in the folder definition. If you do not select this check box, only the folder layout is saved.

To view the query criteria for a folder:

1. Choose **View Query** from the **Folder** menu.

   The **Folder Query** window displays the query used to retrieve the records displayed in the folder. An empty window indicates that the folder retrieves all records.

To reset the query criteria for a folder:

1. Choose **Reset Query** from the **Folder** menu.

   This clears the query from the current folder, but retains the current folder name and field layout.

2. Perform another query and choose **Save** from the **Folder** menu to save the new query to your current folder.

Customizing the Layout of a Folder

Use the **Folder** menu or the **Folder Tools** window to customize the folder layout. Some layout changes can be made using the mouse. For example:

- Change the width of a column by dragging the column's border.
- Change the sequence of a column by dragging the column's heading to a new position.
- Change the name of a column by using the right mouse button on the column's heading. A window prompts you for the new name.

To access the Folder Tools window:

1. Select the **Folder Tools** toolbar icon, or choose **Folder Tools** from the **Folder** menu.

Running Reports and Programs

Use Standard Request Submission to run reports and programs.

> **Important:** Some forms automatically submit a request when you choose a specific button or save your work.

Request Submission

To submit a request or request set:

1. Navigate to the **Submit a New Request** window (navigation varies by application).
2. Select the request type (**Single Request** or **Request Set**) and select **OK**.
3. Enter the request **Name** from the list of available requests in the **Submit Request** window.

   If you are submitting a request set, enter the **Request Set** name in the **Submit Request Set** window.

   > **Note:** Use the **Copy...** button to display a list of all requests that you have previously submitted from this responsibility. Select a request from the list and choose the **Submit** button.

4. Define parameters.

   If a request requires parameter values, the **Parameters** window opens. (Note: Your user profile option Flexfields:Open Descr Window must also be set to "Yes". See Defining Preferences with User Profile Options, page 2-16.)

   Enter the values in the required parameter fields and choose **OK.**

5. Determine the output language.

   If your site supports multiple languages, select the language for your request output.

   Choose the **Language Settings...** button to open the **Languages** window. If the language selection is predefined in the report, the **Language Settings...** button is not enabled.

   In the **Languages** window select the **Language**, **Territory**, and **Numeric Character** settings appropriate for your report.

   Select the **Select All** button to produce output in all languages supported at your site or to check individual languages.

   > **Important:** Each language creates its own request, so the number of languages determines the number of requests created and tracked in the **Requests** window.

6. Define a submission schedule.

   Define a schedule to run a request as soon as possible, at a specific time, or repeatedly at specific intervals.

   Choose the **Schedule...** button to open the **Schedule** window.

   Choose a type of schedule from the **Run the Job...** option group. Some schedule selections require additional information.

   To save your schedule, select the **Save this schedule** check box. You are prompted to enter a unique name for your schedule.

7. Define completion options.

   To view your output online or to save your output to a file select the **Save all Output Files** check box in the **Upon Completion...** region.

Select the **Options...** button to change the default layout, notification, and output options.

Layout:

- **Template Name** - If the request has multiple layout templates available, you can select a different template to apply to the request.

  If you selected multiple language outputs from the **Languages** window, a separate template entry displays for each language. You can apply a different template for each language.
- **Template Language** – This field defaults to the language selected for the request. If the template is not available for a selected language, this field defaults to the session language.
- **Format** – The output format selection varies by template. Some options are PDF, RTF, and HTML.
- **Preview** - If sample data is available for the request, select the **Preview** button to display the selected template with the sample data.

Notify the following people:

Select the e-mail address of each person you wish to notify, and the language (if applicable). This option will send an e-mail notification with a link to the request output.

Print the Output To:

For printed output, select the printer, copies, and print style.

> **Note:** Some requests have a required **Style** or **Printer** value that you cannot change.

8. After you have specified the scheduling and completion options, choose the **Submit** button. A **Decision** window displays the **Request ID**. To submit another request, select **Yes**.

   If you are submitting a request set, a **Request ID** is assigned to the set and to each request in the set.

Monitoring Requests

The **Requests** window allows you to:

- View the status of your submitted requests
- Change processing options
- Diagnose errors
- View your request output

> **Important:** The profile option Concurrent:Report Access Level determines the requests displayed in the **Requests** window. If the option is set to "User", only your user requests are displayed. If the option is set to "Responsibility" all requests submitted by users of your responsibility, in addition to the requests for your user ID, are displayed.

Request Phase and Status

A request has a life cycle consisting of the following phases: pending, running, and completed. If a request is on hold or unable to run, the request is placed in an inactive phase.

During each phase, a request has a specific status. Listed below are the possible statuses for each phase:

- Pending Phase - Normal, Standby, Scheduled, Waiting
- Running Phase - Normal, Paused, Resuming, Terminating
- Completed Phase - Normal, Error, Warning, Cancelled, Terminated
- Inactive Phase - Disabled, On Hold, No Manager

For more information about the status of your request, select the **Diagnostics** button in the **Requests** window.

Finding Requests

To find requests:

1. Open the **Requests** window (navigation varies by application).

   When you open the **Requests** window, you are directed to the **Find Requests** window.

2. Define your search criteria.

   > **Note:** You can use the **Specific Requests** region to view a list of requests that you did not submit by entering a requestor other than yourself. However, you can only view details, output, and log files for requests submitted by you or your responsibility.

3. Select **Find**.

Options for Requests in Progress

Hold or cancel pending requests from the **Requests** window using the **Hold Request** or **Cancel Request** buttons.

View request diagnostics by selecting the **Diagnostics** button. The **Request Diagnostics** window displays information about the request run. The window may contain a **View XML** button to display the generated XML data, if applicable.

You can change completion and scheduling options for requests that meet the following criteria:

- You made the initial request.
- The request has not yet run.
- The program does not prevent request updates.

To Change Options for a Request in Progress:

1. Select the request from the list.
2. Select the **View Details...** button to launch the **Request Detail** window.

- To update a request's schedule, select the **Schedule...** button.
- To update a request's completion options, select the **Options...** button from the **Upon Completion...** region.

Viewing Request Output

Reports are displayed in a browser, in the **Report Viewer**, or in another application registered by your system administrator. Reports that produce an output other than a text file (for example, HTML or PDF) are displayed in a browser.

Set the profile option Viewer: Text to "Browser" to display your text files in a browser. If your system administrator registered other applications for viewing reports, select your text viewer application using the profile option Viewer: Application for Text. If this profile option is not set, you get a choice of applications when you view the report.

For more information about these profile options, see Defining Preferences with User Profile Options., page 2-16

To View Request Output:

1. Navigate to the **Requests** window.
2. Select the completed request and select the **View Output** button.

To view request log files

1. Select the **View Log** button.

To save request output displayed in the Report Viewer

1. Choose **Copy File...** from the **Tools** menu to display the **Viewer Option** window.
2. Select an output file format. This action opens your browser window.
3. From the browser window, use your browser's tools to save your request output to a file.

To Republish or Reprint a Request:

Requests with multiple layout templates can be republished using a different template. If multiple templates are not available, reprint is the only option.

1. Select the request and choose the **Republish** button or choose **Republish...** from the **Tools** menu.
2. In the **Republish and Reprint Request** window, choose one of the following:

   Republish & Print - Allows you to select a new layout template, language, and output format for the data already generated by your request, and print the output.

   Republish & View - Allows you to select a new layout template, language, and output format for the data already generated by your request and simply view the output online.

   Reprint existing output - Reprints the request.
3. Choose the **Layout** and **Printer** options as appropriate for your selection.

To Save Reports from Your Browser:

You can use the **Save As** functionality of your browser to save an HTML report to your desktop. Ask your system administrator for assistance if your browser does not display your language's character set clearly.

Exporting Records to a File

Use the export feature to save the records in a multi-row block to a tab-delimited file. Open the file in the application of your choice.

To start an export:

1. Query the records you want to export.
2. Place your cursor in the multi-row block that contains the records to be exported.
3. Choose **Export...** from the **File** menu.

Exporting Large Numbers of Records:

Export, by default, selects all the records retrieved by the query. If the number of records exceeds 100, you are prompted to:

Stop - Limit the export to those records you have explicitly selected. Alternatively, cancel the export.

Continue to End - Export all records retrieved by the query.

> **Important:** Avoid exporting a very large number of records as system performance can be affected.

Continue - Select the next 100 records for export. You are prompted every 100 records until all records are selected, or you choose **Stop** or **Continue to End**.

Attachments

Use the **Attachments** feature to link text or other files to a record.

The **Attachments...** toolbar icon is enabled when the attachments feature is available. If the current record already has an attachment, the icon appears to hold a piece of paper.

To open the Attachments window:

1. Click the toolbar icon, or choose **Attachments...** from the **View** menu.

To add a new attachment:

1. Select a **Category** from the list of values. The **Category** defines the purpose of an attachment, and controls which forms or pages can access it.
2. Select the attachment **Data Type** from the list of values:
    - Text - Enter text that is less than 2000 characters. If the text you want to attach is more than 2000 characters, upload it in a file.
    - File

      Launch the **Upload a File** window in your browser. Select the **Browse** button to locate the file in your file system, or enter the file location in the **File** field.

- Web Page

  Your cursor advances to the **URL** field on the **Source** tab of the window. Enter the URL for the Web page.

3. Optionally add a title for your document.
4. Select the **May Be Changed** check box to allow changes to the attachment.

To attach a document from the Document Catalog:

1. Choose the **Document Catalog...** button to open the **Document Catalog** window.
2. Use the **Find Existing Documents** region to query existing documents. Matching documents are returned in the **Documents** region.

   > **Note:** To copy an attachment from another record, use the **Attached To:** field to select the application object you want to copy attachments from.

3. To view a document before attaching it, select it and choose the **Preview** button.
4. Select the document(s) to attach.
5. Choose the **Attach (*n*)** button (where *n* is the number of documents selected).

To view an attached document:

In the **Attachments** window, select the attachment you want to view. If the attachment does not automatically display in the document block, select the **Open Document** button to view the document in a browser.

To delete a record's attachment:

When you delete an attachment, you can:

- Remove the association between the record and the attached document
- Remove the attached document from the file system or database

1. In the **Attachments** window, select the document to delete.
2. Choose **Delete** from the **Edit** menu.
3. Select a button in the **Decision** window to remove either the **Document and Attachment** or just the **Attachment**.

Defining Preferences with User Profile Options

Use profile options to modify the way your applications run.

Oracle E-Business Suite supports a set of user profile options that are common to all applications. In addition, each application has its own set of user profile options. See your application's documentation for information on application-specific profile options.

Profile Hierarchy

Profile options can be set at four levels:

- Site - affects all applications installed at a site.
- Application - affects a specific application.

- Responsibility - affects the applications assigned to a specific responsibility.
- User - affects the applications run by a specific user.

A User-level setting overrides a Responsibility-level setting, which overrides an Application-level setting, which overrides a Site-level setting.

Your system administrator sets options at all four levels. You can change options only at the User level.

Setting Profile Options

Use the **Profile Values** window to display and change your user profile options.

> **Note:** There are some profile options that you can view but not change. For example, you can view the value for Concurrent:Request Priority, which is set at the User level, but only your system administrator can change its value.

If you do not set a user profile option, it assumes a default value set either by your system or your system administrator.

To set a profile option:

1. Navigate to the **Profile Values** window (navigation varies by application.)
   - To view a specific profile, use **Find** or **Query by Example**.

     The **Profile Values** window displays the **Profile Name**, **Default Value**, and **User Value**.
2. Enter a value in the **User Value** field, or choose a value from the list of values, if available. To accept the default setting, clear the **User Value** field.

   > **Important:** Number and date values are not validated. Ensure that you enter a valid number or date, or the associated profile option may not work as you expect.
3. Choose **Save** from the **File** menu, or select the **Save** toolbar icon.

   > **Note:** Some profile option changes do not take effect until you change responsibilities or restart your session.

Common Profile Options

Concurrent: Report Access Level

Determines access privileges to report output files and log files generated by a concurrent request. Only a system administrator can set this option. Valid values are "User" or "Responsibility".

Flexfields:Open Descr Window

Controls whether a descriptive flexfield window automatically opens when you navigate to it. Valid values are "Yes" or "No".

FND: Indicator Colors

Valid values are "Yes", "No", or null (defaults to "Yes".) When this profile option is set to "Yes":

- Required fields are displayed in yellow.
- Queryable fields are displayed in a different color while in enter-query mode.
- Read-only fields are rendered in dark gray.

Folders:Allow Customization

Determines whether you can personalize folders. Valid values are:

- "Yes" - you can create or customize folder definitions.
- "No" - you can open only existing folder definitions.

Only the system administrator can update this profile option.

Indicate Attachments

Turns off the indication of attachments when querying records (for performance). Only the system administrator can update this option.

Java Color Scheme

When the Java Look and Feel profile option is set to "oracle", you can select from the color scheme options to best enhance usability of the Forms-based interface.

Java Look and Feel

The Forms-based interface can be run with either the "Oracle look and feel" or the "Generic look and feel." The Oracle look and feel provides a predefined set of color schemes and display attributes. The Generic look and feel adheres to the interface and color scheme of your operating system.

This option must be set to "oracle" to specify the Java Color Scheme.

Printer

Use this option to define your printer.

Sign-On:Notification

Valid values are "Yes" and "No". "Yes" displays a message at login that indicates:

- If any concurrent requests failed since your last session.
- How many times an incorrect password was used with your username since you last logged on.
- If the default printer identified in your user profile is unregistered or not specified.

Viewer: Application for Text

If your system administrator has registered other applications for viewing text output, select the application from the list of values. The option Viewer: Text must be set to "Browser" to use this option.

Viewer: Text

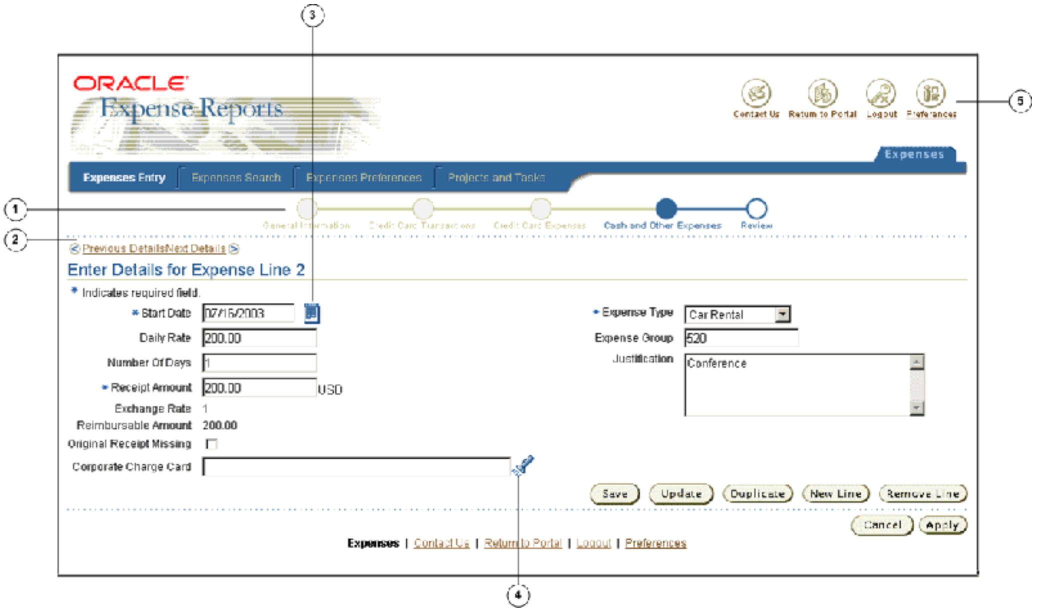
Sets the display viewer for text report output. Valid values are "Browser" and "Report Viewer".

3

HTML-Based Applications

Using HTML-Based Applications

HTML-based applications use the following common components:


3
5
1
2
4
ORACLE
Expense Reports
Contact Us
Return to Portal
Logout
Preferences
Expenses
Expenses Entry
Expenses Search
Expenses Preferences
Projects and Tasks
General Information
Credit Card Transactions
Credit Card Expenses
Cash and Other Expenses
Review
Previous Details
Next Details
Save
Update
Duplicate
New Line
Remove Line
Cancel
Apply
Expenses | Contact Us | Return to Portal | Logout | Preferences

Enter Details for Expense Line 2

* Indicates required field.

* Start Date: 07/15/2003
Daily Rate: 200.00
Number Of Days: 1
* Receipt Amount: 200.00 USD
Exchange Rate: 1
Reimbursable Amount: 200.00
Original Receipt Missing: ☐
Corporate Charge Card:
* Expense Type: Car Rental
Expense Group: 520
Justification: Conference

1. Process Train
2. Navigation Links
3. Date Picker
4. List of Values Icon
5. Global Buttons

Navigating

Navigate to functions in an HTML-based application using tabs, subtabs, and side navigation elements. As you drill down through these elements, locator links display your navigation path.

When you navigate through records in a table, use the **Previous** and **Next** links. When you navigate through steps of a task, use the **Back** and **Next** buttons.

Important: Use these forward and backward navigation elements provided by the application. Do not use your browser's buttons.

Process Train

If you are executing a process, a process train shows the location of the current page in the process. Some process trains are interactive. These allow you to jump one or more steps backward in the process by selecting the step icon.

Locator Links

Locator links (sometimes called "breadcrumbs") are series of links and text that show your navigation path through an application. Use the links to return to a previous point in your navigation path.

Querying and Viewing Data

Pages that allow you to search for data display a **Search** panel that generally includes a search region and a results region. Many search panels contain an **Advanced Search** button that allows more detailed searches using additional criteria.

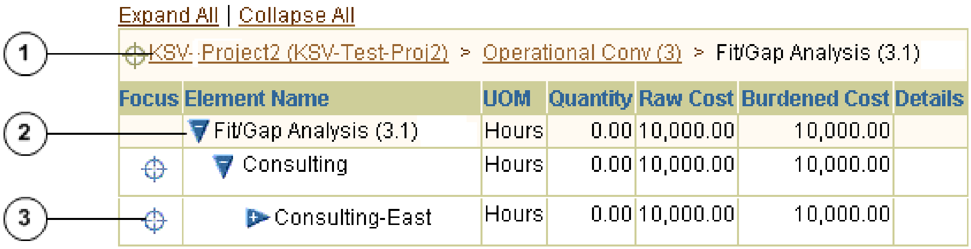
When you enter characters in a search field, a wildcard is implicitly added to the end of the string.

The results region displays search results in a table. Columns that are sortable have a highlighted heading. The currently-sorted column displays an arrow icon to indicate whether the sort is ascending or descending.

Click the column heading of a sortable column to sort by that column. Click it again to toggle between ascending and descending order.

Many pages allow you to save searches and personalize the display tables. See Personalizations., page 3-5

Using a Hierarchical Grid (HGrid)



KSV- Project2 (KSV-Test-Proj2) > Operational Conv (3) > Fit/Gap Analysis (3.1)

Focus	Element Name	UOM	Quantity	Raw Cost	Burdened Cost	Details
	Fit/Gap Analysis (3.1)	Hours	0.00	10,000.00	10,000.00	
⌖	Consulting	Hours	0.00	10,000.00	10,000.00	
⌖	Consulting-East	Hours	0.00	10,000.00	10,000.00	

1. Locator links define the position of the displayed grid in the navigation hierarchy.
2. Use the **Hide/Show** icon to expand and collapse the branches of the tree.
3. Use the **Focus** icon to display only a specific branch in the tree.

Entering Data

Entering Data in a List of Values (LOV) Field

If you know the value for a field, enter it and press the Tab key. If you do not know the value, choose the list of values icon to launch the **Search and Select** window. Enter a partial value before launching the **Search and Select** window to limit the results. If the partial value matches only a single value, the field autofills and the **Search and Select** window does not launch.

Some **Search and Select** windows support alternate search criteria. Use the **Search by** pulldown list to select a different search field. Enter the search string and select the **Go** button. Select the value from the **Results** region and choose the **Select** button.

LOV Choice List

When a field has a long list of possible values from which a small subset is commonly used, you may see an LOV choice list. The LOV choice list displays the most commonly-used values for easier selection, and includes a **More...** option. Choosing **More...** launches the LOV **Search and Select** window.

When you choose a value that is not in the LOV choice list, it is added to the list.

Personalizing an LOV Choice List

An LOV choice list may allow you to customize the list with the values that you use most frequently.

To personalize an LOV choice list:

1. Select the **Personalize** button next to the LOV choice list to open the **Personalize** window.
2. To add a value, select it and choose the **Add** button.
3. To delete a value, select the icon in the **Delete** column.

    Note: Some values cannot be deleted.

4. To reorder the list, select the **Reorder** button. In the **Reorder** window, select a value you want to move and use the **Move** icons to position in it in the list. When finished, select the **Apply** button.

Entering Dates

Enter a date directly in a field using the format defined in your Preferences. Alternatively, select the calendar icon to launch the **Date Picker**. When you select a date, the window closes and inserts the date into the field.

Using Hot Keys

The following hot keys are supported in HTML-based applications. To perform the action, press the Alt key + the key listed in the table:

Action	Key
Apply	p
Back	k
Cancel	l
Continue	c
Finish	i
Next	x
No	n
Save	s
Search	r
Submit	m
Yes	y
Right Subtab	>
Left Subtab	<

Using Attachments

Use the **Attachments** feature to link text or other files to a record.

If the **Attachments** feature is available the page will display either the **Attachment List** link or the **Attachments** icon.

The method to initiate an **Attachments** flow will vary, depending on how the feature is implemented on your page.

To add a new attachment

1. Display the **Add Attachments** page.
2. Using the **Add** poplist, select how you want to add the attachment.

From a Desktop File/Text/URL

1. Select a **Category** from the list of values. The **Category** defines the purpose of an attachment, and controls which forms or pages can access it.
2. Select the attachment **Type**:
   - File - specify a file name to upload. Enter the file location, or use the **Browse** button to locate the file.
   - URL - enter the URL for a Web page.
   - Text - Enter text that is less than 2000 characters. If the text you want to attach is more than 2000 characters, upload it in a file.

From the Document Catalog

1. Use the **Search** regions to query existing documents.
2. Select the **Document Name** link to view a document before attaching it.

3. Select the document(s) to attach.
4. Select the **Apply** button.

Save your work in the application page from which you launched the attachments flow. The attachments are not added until you save your work in the parent region.

To view an attached document

In the **Attachments** page or **Attachments** table, select the **File Name** link.

- If the attachment is a URL, the Web page will launch.
- If the attachment is a file, a dialog box prompts you to open or save the file.
- If the attachment is text, the View Attachment page displays the text content.

To edit an attachment

1. Display the **Attachments** page or **Attachments** table.
2. Select the **Update** icon.
3. In the **Update Attachment** page, edit only the information as it pertains to the attachment. For example, you can update the URL for a Web page attachment, but you cannot change it to a File attachment.
4. Select the **Apply** button.
5. Return to the application page from which you launched the attachments flow and save your work. Attachment updates must be saved in the associated parent region.

To delete a record's attachment

In the **Attachments** page or **Attachments** table, select the **Delete** icon.

Personalizations

Some tables allow you to save queries and personalize the presentation of data. If a table can be personalized, you see the **Views** panel or the **Save Search** button.

> **Note:** Pages can have predefined personalizations available from the **View** list. Some pages with no personalizations saved do not show the **Views** panel until a search has been saved.

Personalizing Tables

To create a personalized view:

1. Use the search panel to query for results in the table.
2. Select the **Save Search** button or the **Views** button.
   - The **Save Search** button launches the **Create View** page.
   - The **Views** button displays the **Views** panel. Select the **Personalize** button to launch the **Personalize Views** page. This page displays existing views. Select the **Create View** button to launch the **Create View** page.
3. On the **Create View** page, enter a **View Name**.

4. Specify the number of rows to display in the table.
5. Choose the **Set as Default** check box to make this view the default when you navigate to this page.
6. Personalize other available options.

> **Note:** Personalizable options vary by table. Some tables allow you only to save the search criteria. Others allow you to change more options, such as columns displayed, column order, sort order, and headings.

7. Select the **Apply** button.

To duplicate, update, or delete a personalized view:

1. Select the **Personalize** button to launch the **Personalize Views** page.
2. Select the view from the list.
   - Select **Update** to update the options for this view.
   - Select **Delete** to delete the view.
   - Select the **Duplicate** button to create a duplicate of the selected view. Enter a new **View Name**. Make other modifications as desired and select **Apply**.