

iSupplier - NEW
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External - NEW

01 Create an Invoice

Procedure

Description:

Suppliers can review and submit their own invoices for payment using iSupplier Portal.

Oracle Prerequisites:

- A purchase order must be approved and eligible for invoicing.

NOTE: These scenarios are for training purposes only. They are used as **EXAMPLES** and do not represent actual data.

Step	Action
1.	To complete this procedure, follow the menu path: ISUPPLIER PORTAL HOME PAGE.

The screenshot displays the Oracle iSupplier Portal interface. At the top, there is a navigation bar with links for Home, Orders, Shipments, Account, Product, and Admin. Below the navigation bar is a search field with a dropdown menu set to 'PO Number' and a 'Go' button. The main content area is divided into two sections: 'Notifications' and 'Orders At A Glance'. The 'Notifications' section contains a table with columns for 'Subject' and 'Date', listing several change requests for Standard POs. The 'Orders At A Glance' section contains a table with columns for 'PO Number', 'Description', and 'Order Date', listing several POs. On the right side of the interface, there is a vertical menu with links for Orders, Agreements, Purchase Orders, Receipts, Returns, Invoices, and Payments.

Subject	Date
Response to your change request for Standard PO 2005427 from USA1	28-Oct-2008 13:32:24
Response to your change request for Blanket Release 200811-10 fr...	28-Oct-2008 13:29:54
Response to your change request for Standard PO 2005955 from USA1	28-Oct-2008 13:29:18
Response to your change request for Standard PO 2005427 from USA1	28-Oct-2008 13:27:26
Response to your change request for Standard PO 2005421 from USA1	28-Oct-2008 13:26:41


PO Number	Description	Order Date
2005955		28-Oct-2008 13:29:17
2005427		28-Oct-2008 13:27:26
2005421		28-Oct-2008 13:26:41
200811-10		28-Oct-2008 12:35:18
2002107		28-Oct-2008 12:34:54

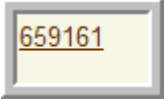
Step	Action
2.	To initiate invoice creation, click on the Account tab or the INVOICE link in the navigation pane. Click the Account tab.




Step	Action
3.	<p>Open the <i>Create Invoice</i> window.</p> <p>Optional. Use the fields in the <i>Search</i> region to locate saved, unsubmitted invoices. Results display in the <i>Saved Invoices</i> table.</p> <p>Create a new invoice in this example.</p> <p>Click on CREATE STANDARD INVOICE.</p>

The screenshot displays the Oracle Supplier Portal interface for creating an invoice from purchase orders. At the top, there are navigation tabs for Home, Orders, Shipments, Account, Product, and Admin. Below these is a progress bar with four steps: Purchase Orders (selected), Lines to Invoice, General Information, and Review and Submit. The main heading is 'Create Invoice: Purchase Orders' with 'Cancel' and 'Step 1 of 4 | Next' buttons. A search section follows, with instructions to enter search criteria. The search form includes fields for Supplier, Purchase Order Number, Purchase Order Date (with a date picker), Buyer, and Organization, along with 'Go' and 'Clear' buttons. Below the search form is a table with columns: Select, Quick Invoice, PO Supplier Number, Line Shipment Description, Item Number, Supplier Item Number, Ordered Received Invoiced UOM, Unit Price, and Ship Organization. The table currently shows 'No search conducted.' A tip at the bottom states: 'TIP For one item select Quick Invoice. Quantities or amounts will be specified later.' Navigation buttons 'Cancel' and 'Step 1 of 4 | Next' are at the bottom right.

Step	Action
4.	<p>Enter search criteria to return only purchase order number 134. Search using any of the fields in the <i>Search</i> region to locate the purchase order to be invoiced. In this example, a search is performed by purchase order number.</p> <p>Alternatively, you could search for all POs eligible for invoicing by leaving all the search fields blank. This should read: by searching by Supplier Name.</p> <p>Type 134 in the PURCHASE ORDER NUMBER field to enter search criteria.</p>
5.	<p>Execute the search.</p> <p>Click on GO.</p> 

Step	Action
6.	<p>Optional. Click in the SELECT checkbox corresponding to a purchase order line that will be added to the new invoice. If only one line is selected, use the QUICK INVOICE icon. If multiple PO lines are selected, click on ADD ITEMS TO INVOICE LIST.</p> <p>To view additional detail on the purchase order, click on the PURCHASE ORDER link.</p> <p>Click on 659161 to select the appropriate purchase order number.</p> 



ITEM DESCRIPTION: The line ITEM DESCRIPTION is displayed in this field.


QUANTITY RECEIVED: The QUANTITY that has been RECEIVED is displayed in this field.

QUANTITY INVOICED: The QUANTITY that has already been INVOICED is displayed in this field. This is useful when partial payments have been made.

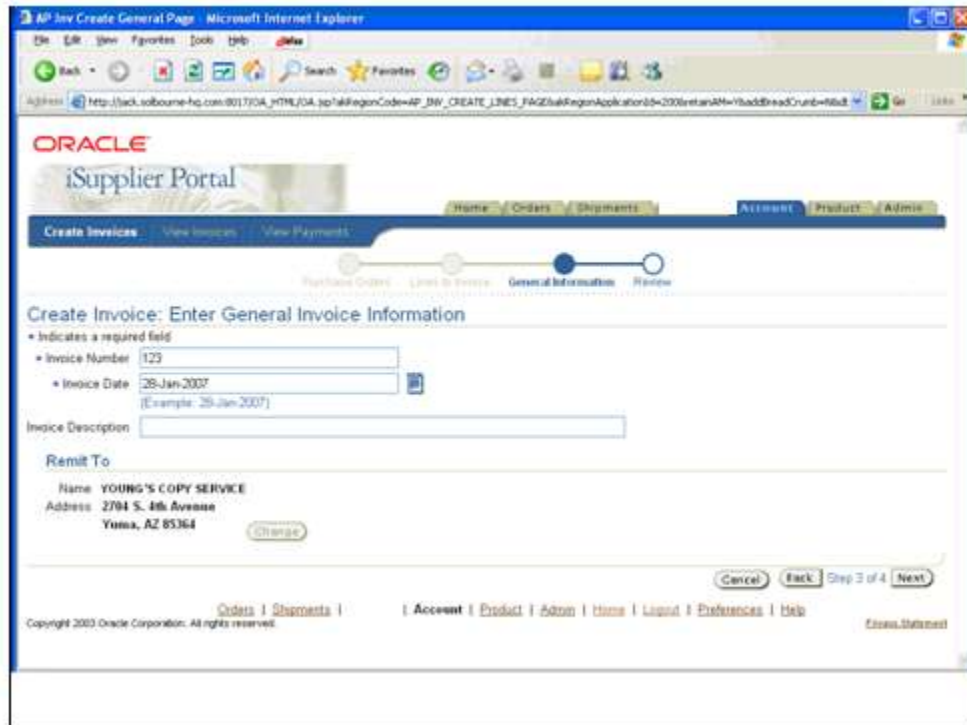
UNIT PRICE: The UNIT PRICE is displayed in this field.


QUICK INVOICE: Optional. The QUICK INVOICE feature can be used to submit an invoice for the remaining amount.

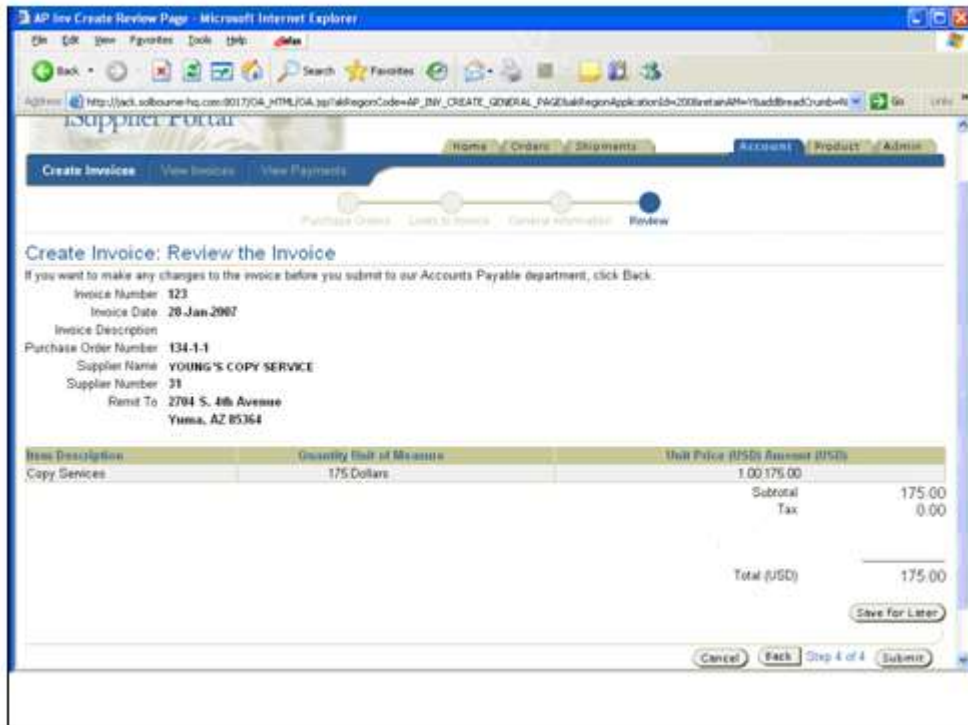
Step	Action
7.	Enter the quantity to be invoiced in the QUANTITY TO INVOICE field. Type 3000 in the QUANTITY TO INVOICE field.
8.	When invoicing multiple purchase orders or purchase order lines, click on CALCULATE to have the system calculate a running invoice total.

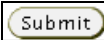
Step	Action
9.	Accept the settings in the <i>Include Lines on Invoice</i> window and advance to the next step. Click on NEXT . 

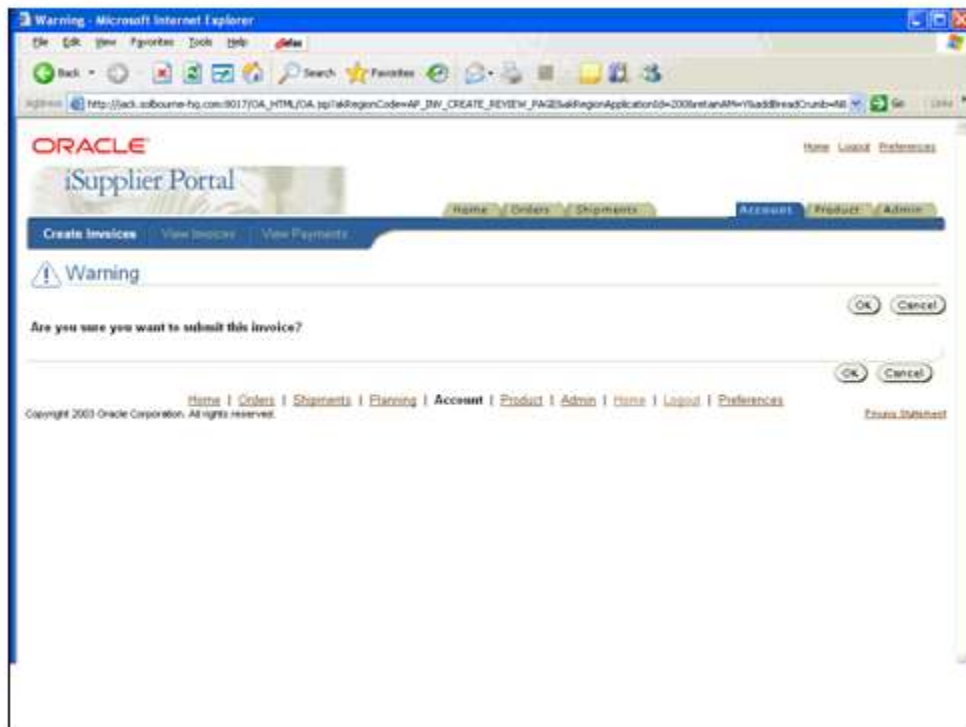
Step	Action
10.	The <i>Enter General Invoice Information</i> window displays. Enter an invoice number. Type 123 in the INVOICE NUMBER field.
11.	Enter free text in the appropriate field. Enter an invoice date. Type 28-Jan-2007 in the INVOICE DATE field.



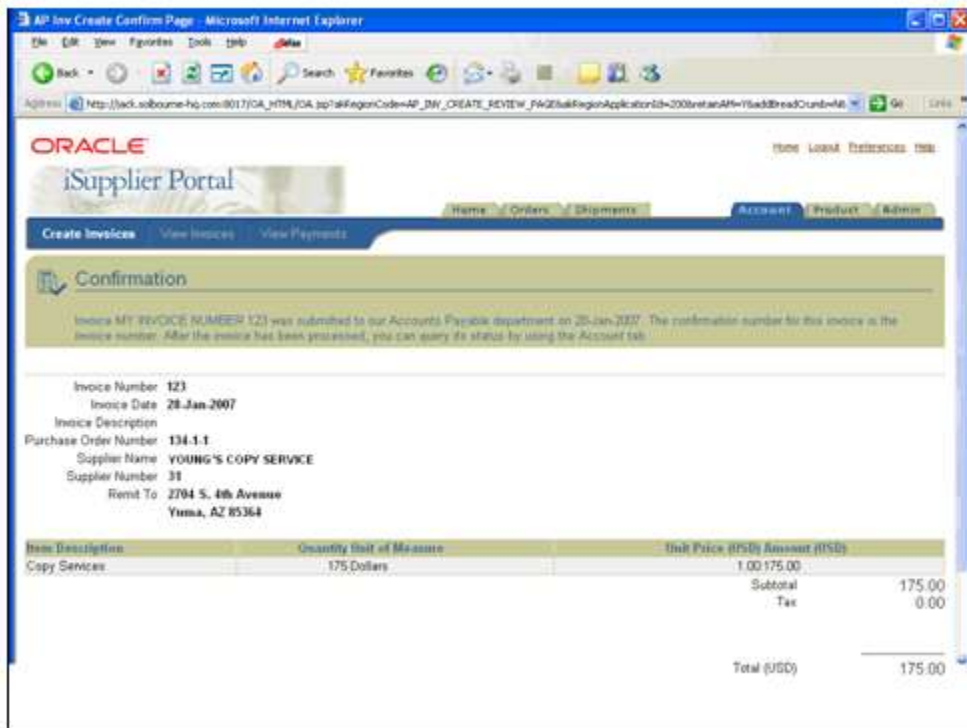
Step	Action
12.	<p>Optional. Enter an invoice description.</p> <p>Review the <i>Remit To</i> information for accuracy.</p> <p>Advance to the next step.</p> <p>Click on NEXT.</p> <p></p>



Step	Action
13.	<p>Submit the invoice. The <i>Create Invoice: Review the Invoice</i> window displays. Review the invoice information and then submit to Accounts Payable.</p> <p>Click on SUBMIT.</p> 



Step	Action
14.	Verify the submission. The system prompts you to verify the submission. Click on OK .



Step	Action
15.	A system message confirms the invoice submission. Click on the Home tab or HOME link to return to the Navigator.
16.	In this lesson, you learned how an invoice is created from a purchase order in Oracle iSupplier. End of Procedure.

02 External User Views

Procedure

Description:

Use this procedure to review the information and transactions available to external users of the iSupplier portal.

Oracle Prerequisites:

- A supplier must have registered and been approved.

- A supplier user must have registered and been approved.

NOTE: These scenarios are for training purposes only. They are used as **EXAMPLES** and do not represent actual data.

Step	Action
1.	<p>This procedure may be performed using the iSUPPLIER PORTAL FULL ACCESS responsibility.</p> <p>To complete this procedure, follow the menu path: ISUPPLIER PORTAL FULL ACCESS > HOME PAGE.</p>



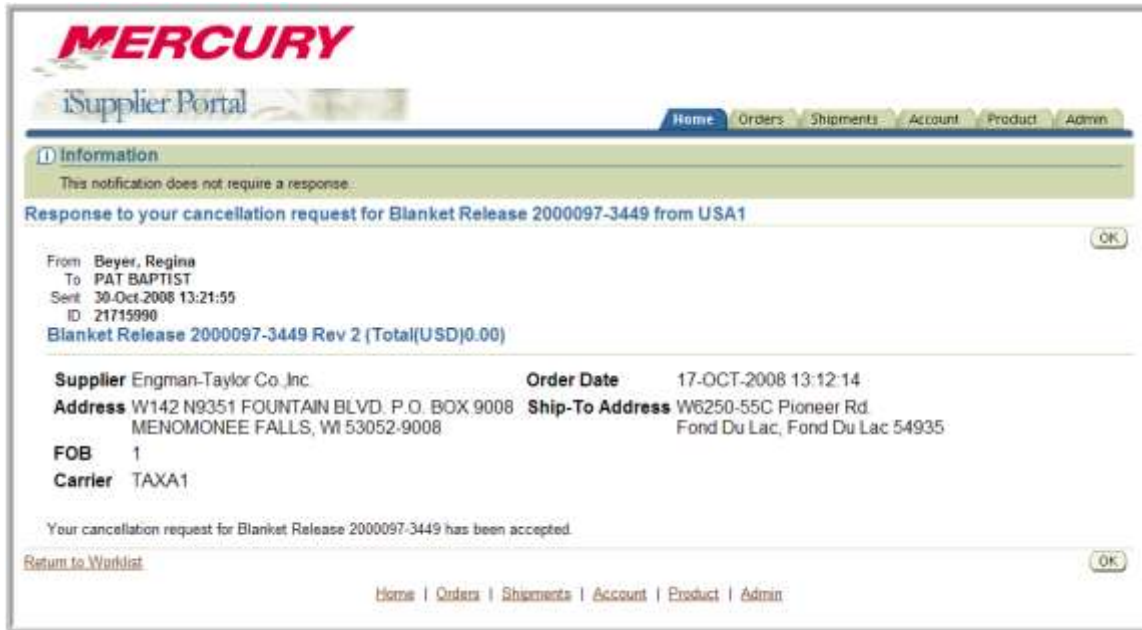
Step	Action
2.	<p>When external users click on the link provided in their registration approval email, they are taken to the <i>MercNet</i> window. Supplier will enter their User name and Password.</p>



Step	Action
3.	<p>After the Supplier logs in, it will go to the iSupplier Welcome page region.</p> <p>Click on the iSUPPLIER link.</p> <p>Click on the HOME PAGE link.</p> <p>Home Page</p>
4.	<p>The <i>iSupplier Portal Home Page</i> provides a search engine external users can use to locate specific documents or document types.</p> <p>Select a category from the first SEARCH field's pull-down menu. The choices are PO NUMBER, SHIPMENT NUMBER, INVOICES, or PAYMENTS.</p> <p>Enter search criteria in the second SEARCH field to further narrow the returns.</p> <p>Click on GO to execute the search.</p>
5.	<p>Outstanding notifications for the supplier display in the <i>Notifications</i> region.</p> <p>The most recent 5 purchase orders submitted to the supplier display in the <i>Orders at a Glance</i> region. The number of orders displayed can be configured using the PREFERENCES link.</p>
6.	<p>External users are provided several navigation options. The <i>Home Page</i> offers a series of tabbed regions that access windows for actions or inquiry.</p> <p>The navigation pane on the right side of the window and the row of links at the bottom of the window offer alternative navigation options.</p>



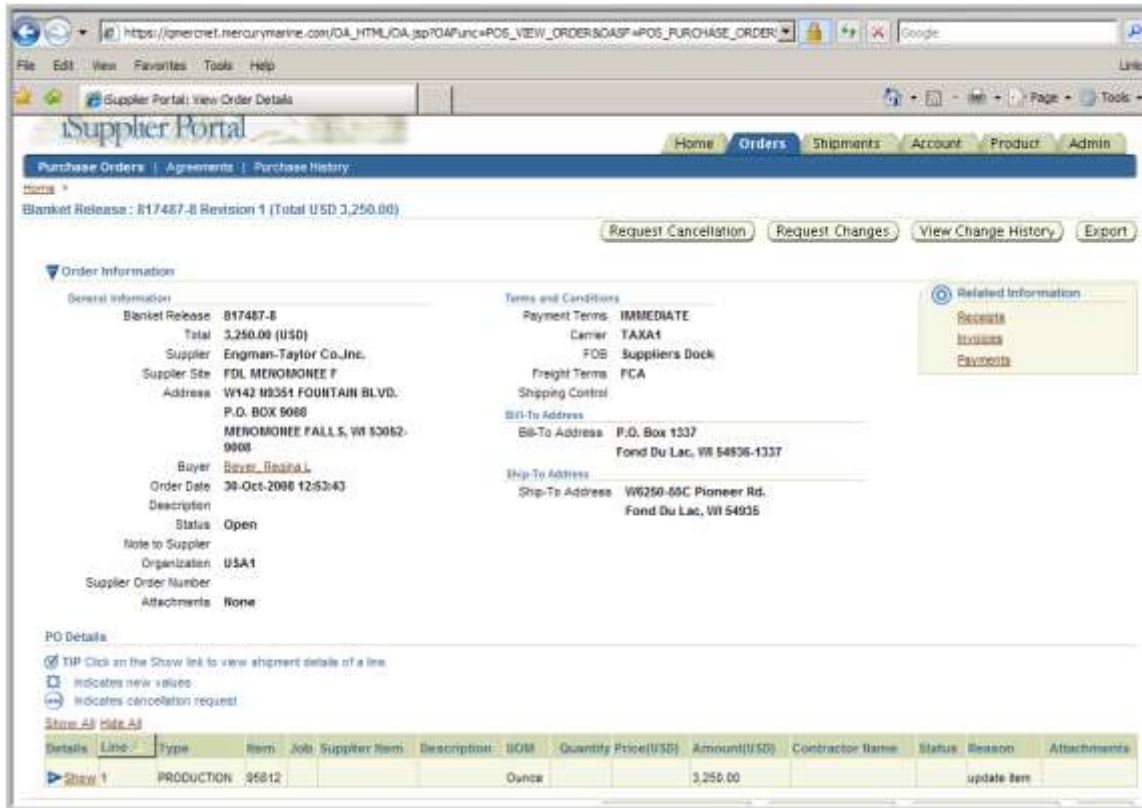
Step	Action
7.	<p>Open the Workflow notification soliciting a quote for the Response to your changes request for Standard PO 20006427 from USA1. Optional. If the notification you need does not display, click on FULL LIST to display all notifications.</p> <p>Click on the notification Response to your cancellation request for Blanket Release 2000097.</p>



Step	Action
8.	<p>The selected notification displays. Review the details and take the appropriate action.</p> <p>Return to the iSupplier Portal Home Page.</p> <p>Click on the Home tab or any of several HOME links.</p>



Step	Action
9.	In the <i>Orders at a Glance</i> region, click on the 817487-8 link. Open any purchase order record by clicking the PO NUMBER link. 817487-8
10.	The purchase order details display. Review the information provided. Click on the appropriate button to initiate actions on the selected order: <ul style="list-style-type: none"> • REQUEST CANCELLATION • REQUEST CHANGES • VIEW CHANGE HISTORY • EXPORT Obtain information on the buyer who submitted the order by clicking on the BUYER link.




Step	Action
11.	<p>Obtain additional information using the links in the Related Information region.</p> <p>Click on RECEIPTS, INVOICES, or PAYMENTS to view documents related to the selected purchase order.</p> <p>Click on SHOW in the PO Details region to view line details of the selected purchase order.</p> <p>Return to the iSupplier Portal Home Page.</p> <p>Click on the Home tab or HOME link.</p>



Step	Action
12.	<p>Open the <i>Supplier Agreements</i> window using a single mouse action. Open the <i>Supplier Agreements</i> window.</p> <p>Click on the AGREEMENTS link.</p> <p>Agreements</p>



Step	Action
13.	<p>Alternatively navigate to this window by clicking on the Orders tab or ORDERS link, then click on the Agreements subtab.</p> <p>Optional. Enter search criteria in the Simple Search region to locate existing supplier agreements. Click on GO to execute the search.</p> <p>Results display in the table.</p> <p>Return to the iSupplier Portal Home Page.</p> <p>Click on the Home tab or HOME link.</p>



PO NUMBER: Enter a PO NUMBER or partial value.

GLOBAL: Select YES or NO from the pull-down menu. **Note:** There are currently no Global Agreements.

EFFECTIVE FROM/TO DATES: Enter dates or select from the Calendar List of Values.

Click on GO to run the query.



Step	Action
14.	<p>Open the <i>View Purchase Orders</i> window using a single mouse action. Open the <i>View Purchase Order</i> window.</p> <p>Click on the PURCHASE ORDERS link.</p> <p>Purchase Orders</p>

MERCURY
iSupplier Portal

Home **Orders** Shipments Account Product Admin

Purchase Orders | Agreements | Purchase History

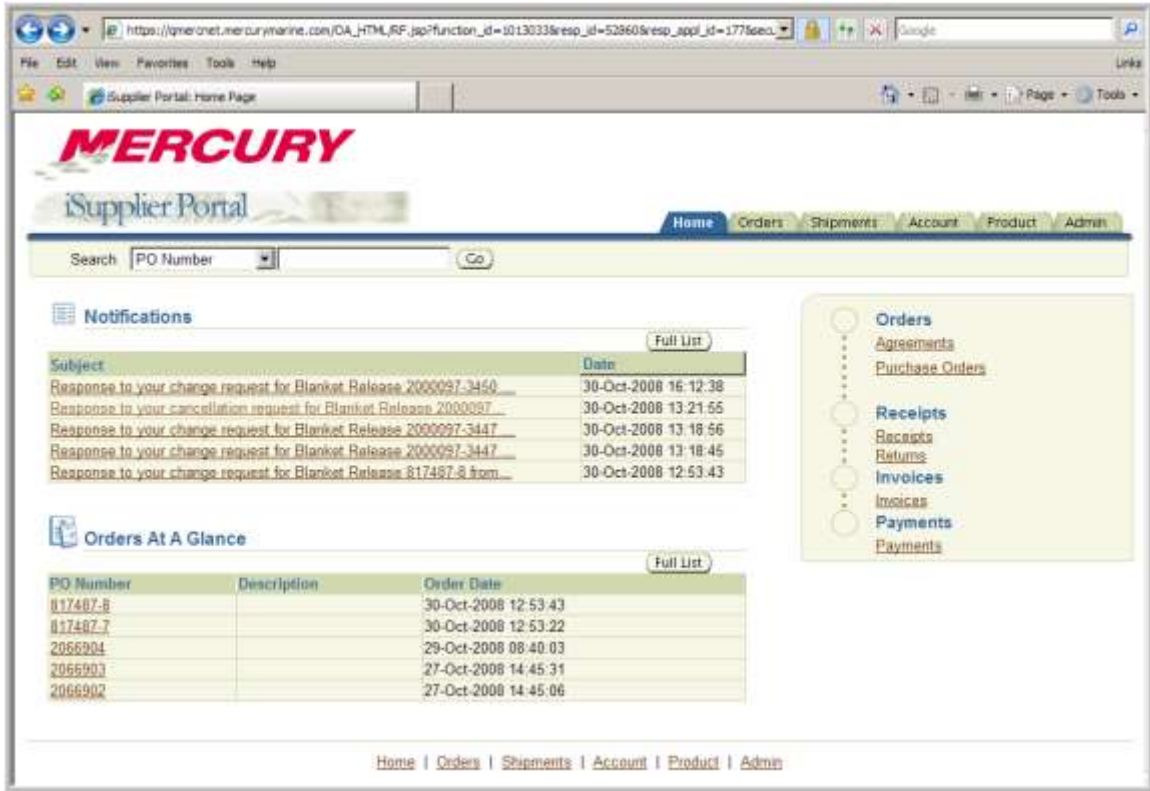
Purchase Orders Export

Views
View: Last 25 Purchase Orders Advanced Search

Select Order:

PO Number	Business Unit	Document Type	Description	Order Date	Buyer	Currency	Amount	Status	Attachments
<input type="radio"/> 2000097-3446	2 USA1	Blanket Release		03-Nov-2008 14:35:08	Bayer_Regina	USD	774.58	Open	
<input type="radio"/> 2000097-3446	2 USA1	Blanket Release		30-Oct-2008 13:21:55	Bayer_Regina	USD	0.00	Closed	
<input type="radio"/> 2000097-3447	2 USA1	Blanket Release		30-Oct-2008 13:18:36	Bayer_Regina	USD	0.00	Closed	
<input type="radio"/> 017487-8	1 USA1	Blanket Release		30-Oct-2008 12:53:43	Bayer_Regina	USD	3,250.00	Open	
<input type="radio"/> 017487-7	1 USA1	Blanket Release		30-Oct-2008 12:53:22	Bayer_Regina	USD	78.75	Supplier Change Pending	
<input type="radio"/> 2066904	0 USA1	Standard PO		29-Oct-2008 08:40:03	Bayer_Regina	USD	227.50	Open	
<input type="radio"/> 2066903	0 USA1	Standard PO		27-Oct-2008 14:45:31	Bayer_Regina	USD	TBN	Open	
<input type="radio"/> 2066902	0 USA1	Standard PO		27-Oct-2008 14:45:06	Bayer_Regina	USD	TBN	Open	

Step	Action
15.	<p>Alternatively navigate to this window by clicking on the Orders tab or ORDERS link. The Purchase Orders subtab displays by default.</p> <p>Recent purchase orders submitted to the supplier display in the table.</p> <p>Optional. Click on the link in the PO NUMBER field to open a purchase order record.</p> <p>Optional. Select a purchase order by clicking on the associated SELECT radio button to its left and then clicking on the ACKNOWLEDGE, REQUEST CANCELLATION, REQUEST CHANGES, or VIEW CHANGE HISTORY buttons to initiate those actions.</p> <p>Return to the iSupplier Portal Home Page.</p> <p>Click on the Home tab or HOME link.</p>



Step	Action
16.	<p>Open the <i>Revision History for Purchase Orders</i> window using a single mouse action. Open the <i>Revision History for Purchase Orders</i> window.</p> <p>Click on the PURCHASE HISTORY link.</p> <p>Purchase History</p>

MERCURY
Supplier Portal

Home | **Orders** | Shipments | Account | Product | Admin

Purchase Orders | Agreements | Purchase History

Purchase Order Revision History Export

Simple Search
Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive. Advanced Search

PO Number

Release Number

Rev

Document Type

Creation Date

Revised Date

Business Unit

PO Number	Business Rev Unit	Description Buyer	Creation Date	Revised Date	Currency Total	Ship-To Location	Compare to Original PO	Compare to Previous PO	Show all PO Changes
No search conducted									

Export

Home | Orders | Shipments | Account | Product | Admin

Step	Action
17.	<p>Enter search criteria to locate PO number 3182. Alternatively navigate to this window by clicking on the <i>Orders</i> tab or ORDERS link, then click on the <i>Purchase History</i> subtab.</p> <p>Enter search criteria to locate a purchase order.</p> <p>Type 3182 in the PO NUMBER field.</p>
18.	<p>Execute the search.</p> <p>Click on GO.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">Go</div>

MERCURY
iSupplier Portal

Home | **Orders** | Shipments | Account | Product | Admin

Purchase Orders | Agreements | Purchase History

Purchase Order Revision History Export

Simple Search
Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive. Advanced Search

PO Number:
 Release Number:
 Rev:
 Document Type:
 Creation Date:
 Revised Date:
 Business Unit:

PO Number	Rev Unit	Business	Description	Buyer	Creation Date	Revised Date	Currency Total	Ship-To Location	Compare to Original PO	Compare to Previous PO	Show all PO Changes
817467-6	0	USA1		Buyer: Regina L	26-Oct-2008 21:59:01		USD 700.00	101 OFFC PLT 15	<input type="button" value="PO"/>	<input type="button" value="PO"/>	<input type="button" value="PO"/>

Export

Home | Orders | Shipments | Account | Product | Admin

Step	Action
19.	<p>The selected purchase order has had no revisions.</p> <p>Optional. For a revised purchase order, click on the COMPARE TO ORIGINAL PO icon to view changes between the revision and the original, click on the COMPARE TO PREVIOUS PO icon to view changes between the revision and the next most recent version, or click on the SHOW ALL PO CHANGES icon to view a complete change history of the selected purchase order.</p> <p>Return to the iSupplier Portal Home Page.</p> <p>Click on the Home tab or HOME link.</p>




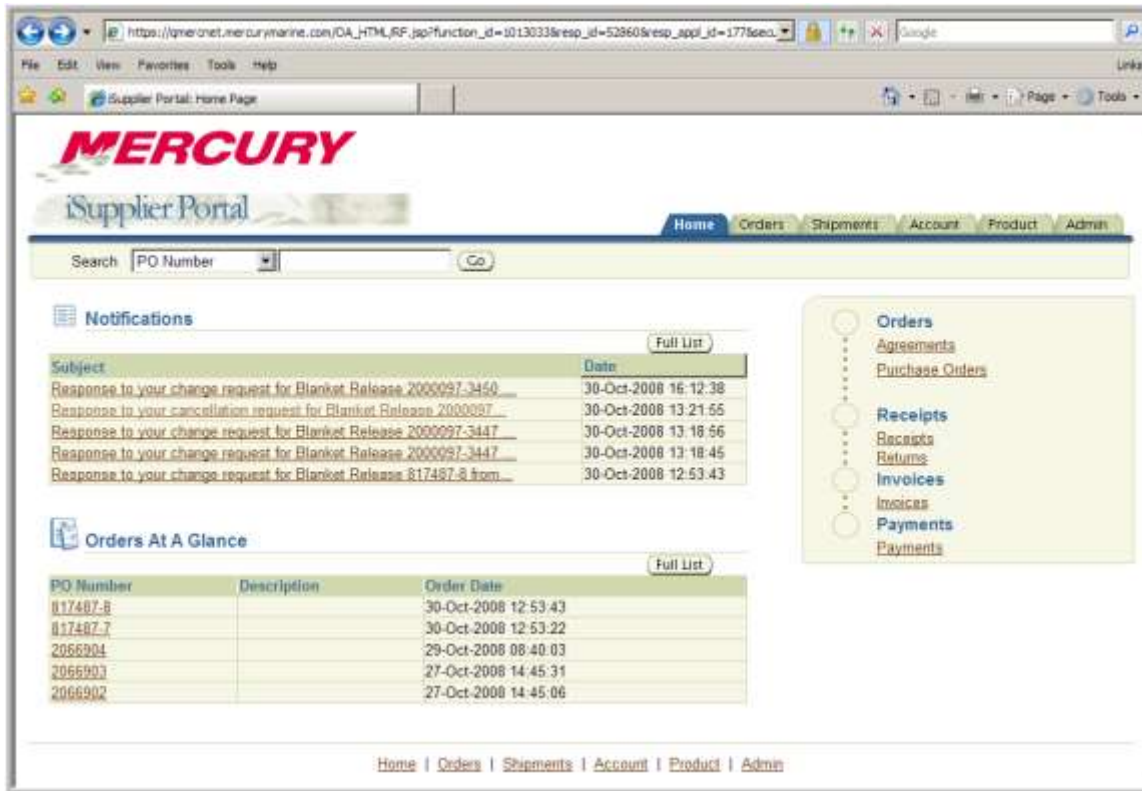
Step	Action
20.	<p>Open the Receipt Transactions window using a single mouse action. Open the Receipt Transactions window.</p> <p>Click on the RECEIPTS link.</p> <p>Receipts</p>

Step	Action
21.	<p>Alternatively navigate to this window by clicking on the Shipments tab or SHIPMENTS link, and click on the Receipts subtab.</p> <p>Optional. Enter search criteria in the Simple Search region to locate existing receipts. Click on GO to execute the search.</p> <p>Results display in the table.</p> <p>Return to the iSupplier Portal Home Page.</p> <p>Click on the Home tab or HOME link.</p>



Step	Action
22.	<p>Open the <i>Returns Summary</i> window using a single mouse action. Open the <i>Returns Summary</i> window.</p> <p>Click on the RETURNS link.</p> <p>Returns</p>

Step	Action
23.	<p>Alternatively navigate to this window by clicking on the Shipments tab or SHIPMENTS link, and click on the Returns subtab.</p> <p>Optional. Enter search criteria in the Simple Search region to locate existing product returns. Click on GO to execute the search.</p> <p>Results display in the table.</p> <p>Return to the iSupplier Portal Home Page.</p> <p>Click on the Home tab or HOME link.</p> <p></p>



Step	Action
24.	<p>Open the View Invoices window using a single mouse action.</p> <p>Click on the INVOICES link.</p> <p><input type="text" value="Invoices"/></p>

The screenshot shows the Mercury iSupplier Portal interface. At the top, there is a navigation bar with tabs for Home, Orders, Shipments, Account (selected), Product, and Admin. Below the navigation bar, there are links for 'Create Invoices', 'View Invoices', and 'View Payments'. The main heading is 'Invoice Summary' with an 'Export' button. A 'Simple Search' section contains various input fields: Invoice Number, Payment Number, Gross Amount From, Gross Amount To, Amount Due From, Amount Due To, PO Number, Payment Status (dropdown), Invoice Date From, Invoice Date To, Due Date From, and Due Date To. There are 'Go' and 'Clear' buttons at the bottom of the search form. Below the search form is a table with the following columns: Invoice Number, Invoice Description, PO Number, Currency, Gross Amount, Amount Due, Due Date, Payment Status, Discount, Available Discount, Packing Slip, Attachments, and Type. The table contains one row with the text 'No search conducted.' and an 'Export' button at the bottom right. A footer navigation bar at the bottom of the page includes links for Home, Orders, Shipments, Account, Product, and Admin.

Step	Action
25.	<p>Alternatively navigate to this window by clicking on the Account tab or ACCOUNT link.</p> <p>Optional. Enter search criteria in the Simple Search region to locate existing invoices. Click on GO to execute the search.</p> <p>Results display in the table.</p> <p>Return to the iSupplier Portal Home Page.</p> <p>Click on the Home tab or HOME link.</p>



Step	Action
26.	<p>Open the View Payments window using a single mouse action.</p> <p>Click on the PAYMENTS link.</p> <p>Payments</p>

The screenshot shows the Mercury iSupplier Portal interface. At the top, there is a navigation bar with tabs for Home, Orders, Shipments, Account (selected), Product, and Admin. Below the navigation bar, there are links for 'Create Invoices', 'View Invoices', and 'View Payments'. The main section is titled 'Payment Summary' and includes an 'Export' button. Underneath is a 'Simple Search' section with input fields for PO Number, Payment Date From, Payment Date To, Payment Amount From, and Payment Amount To. There are 'Go' and 'Clear' buttons for the search. An 'Advanced Search' button is also present. Below the search section is a table with the following columns: Payment, Invoice, PO Number, Payment Date, Currency, Amount, Stopped, Cleared, Voided, Supplier Site, and Supplier Address. The table currently shows 'No search conducted'. At the bottom of the page, there is another 'Export' button and a navigation bar with links for Home, Orders, Shipments, Account, Product, and Admin.

Step	Action
27.	<p>Alternatively navigate to this window by clicking on the Account tab or ACCOUNT link.</p> <p>Optional. Enter search criteria in the Simple Search region to locate existing payments. Click on GO to execute the search.</p> <p>Results display in the table.</p> <p>Return to the iSupplier Portal Home Page.</p> <p>Click on the Home tab or HOME link.</p>

Notifications

Subject	Date
Response to your change request for Blanket Release 2000097-3450	30-Oct-2008 16:12:38
Response to your cancellation request for Blanket Release 2000097-	30-Oct-2008 13:21:55
Response to your change request for Blanket Release 2000097-3447	30-Oct-2008 13:18:56
Response to your change request for Blanket Release 2000097-3447	30-Oct-2008 13:18:45
Response to your change request for Blanket Release 817487-8 from	30-Oct-2008 12:53:43

Orders At A Glance

PO Number	Description	Order Date
817487-8		30-Oct-2008 12:53:43
817487-7		30-Oct-2008 12:53:22
2066904		29-Oct-2008 08:40:03
2066903		27-Oct-2008 14:45:31
2066902		27-Oct-2008 14:45:06

Step	Action
28.	Open the Supplier Items window to perform a product search. Click on the Product tab or PRODUCT link.

Supplier Items

Simple Search
Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.

Supplier Item:

Item:

Item Description:

Go Clear

Supplier Item	Item	Item Description	UOM	Orders	Receipt History	Returns	Inventory	VMI	Consigned Inventory
No search conducted.									

Step	Action
29.	<p>Optional. Enter search criteria in the Simple Search region to locate supplier items. Click on GO to execute the search.</p> <p>Results display in the table.</p> <p>Open the tab used to manage supplier profile information.</p> <p>Click on the Admin tab or ADMIN link.</p>



Step	Action
30.	<p>Log out of the application.</p> <p>External users can manage their supplier profiles from this window.</p> <p>For more information on managing supplier profiles, see the Manage Supplier Profile lesson in this series.</p> <p>Click on the LOGOUT link.</p>
31.	<p>In this lesson, you learned how to review the information and transactions available to external users of the iSupplier portal.</p> <p>End of Procedure.</p>

03 Request a Purchase Order Cancellation

Procedure

Description:

After a purchase order has been submitted and approved, the supplier may request to cancel the purchase order or individual lines on the purchase order.

For example, the supplier's manufacturing equipment may be broken and they won't be able to meet delivery dates. The supplier may request to cancel a purchase order because the item or service has been discontinued or is no longer available.

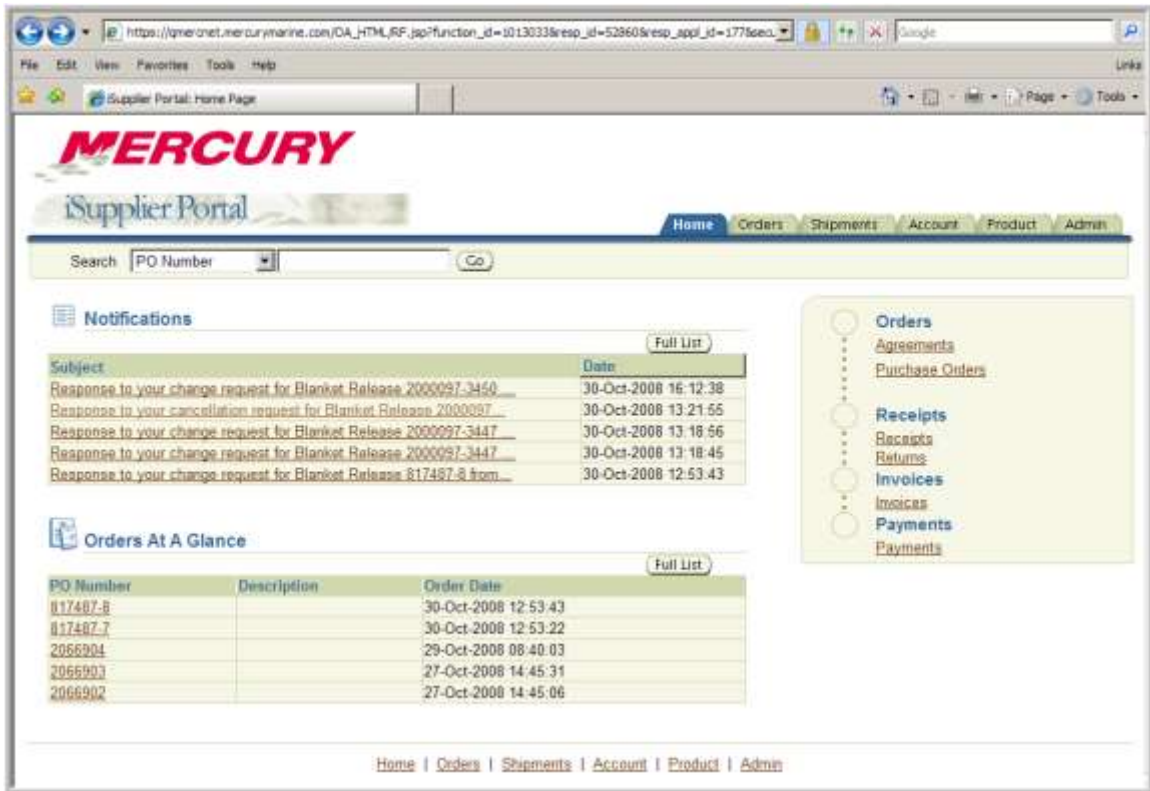
This procedure demonstrates how to request a cancellation for a purchase order.

Oracle Prerequisites:

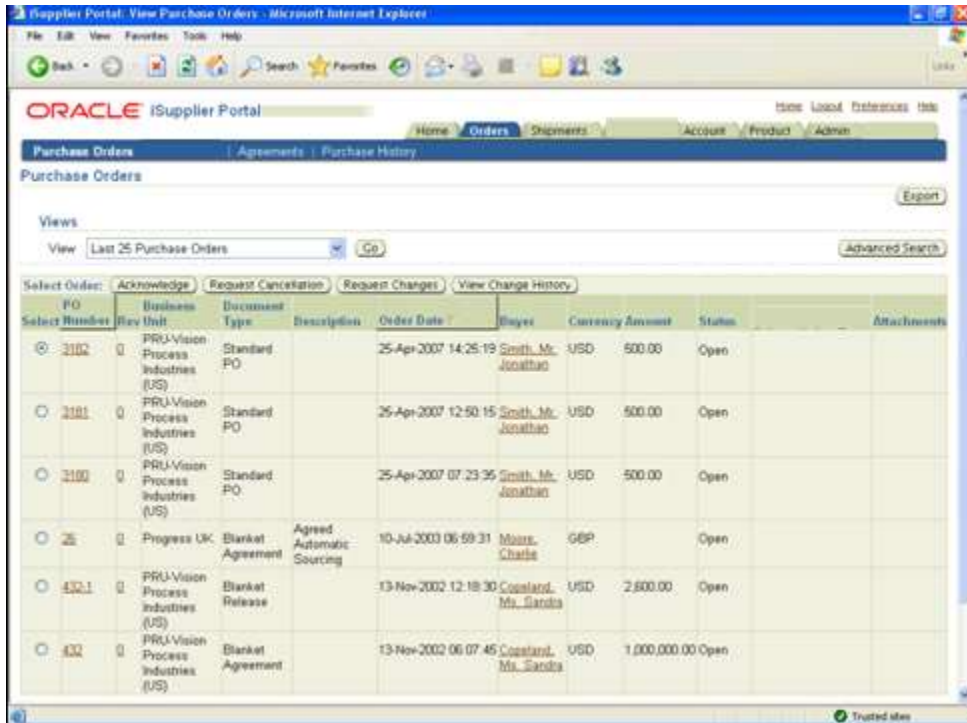
- A purchase order has been created, approved, and forwarded to the supplier.
- The purchase order status is open.

NOTE: These scenarios are for training purposes only. They are used as **EXAMPLES** and do not represent actual data.

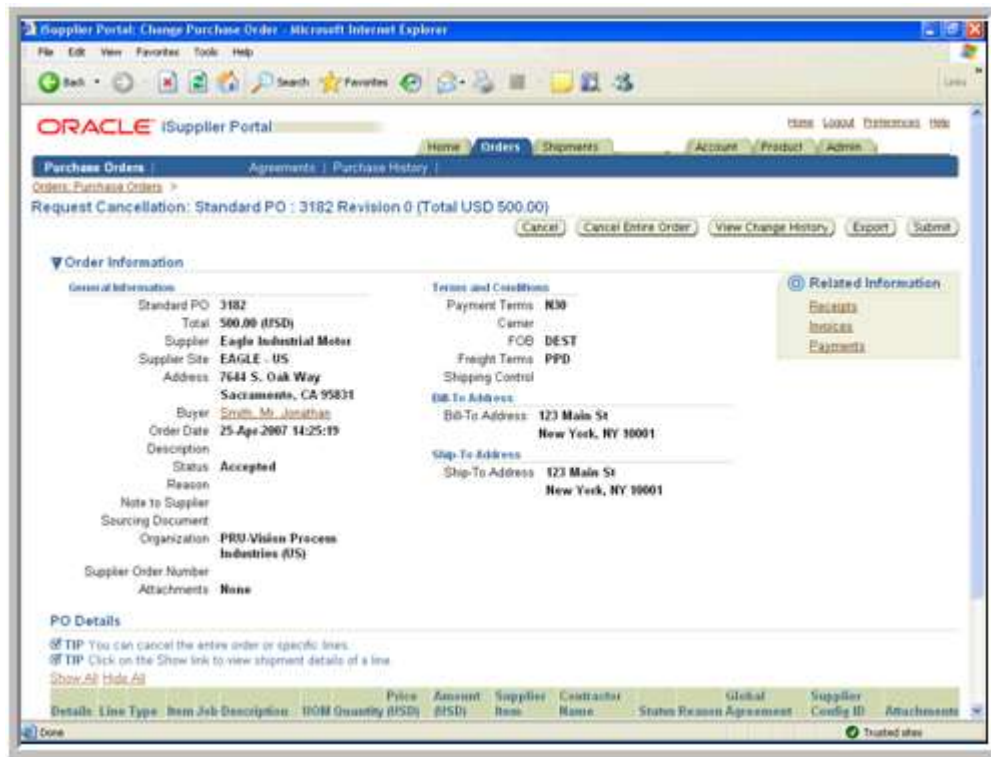
Step	Action
1.	This procedure may be performed using the ISUPPLIER FULL PORTAL ACCESS responsibility. To complete this procedure, follow the menu path: ISUPPLIER PORTAL: HOME PAGE.




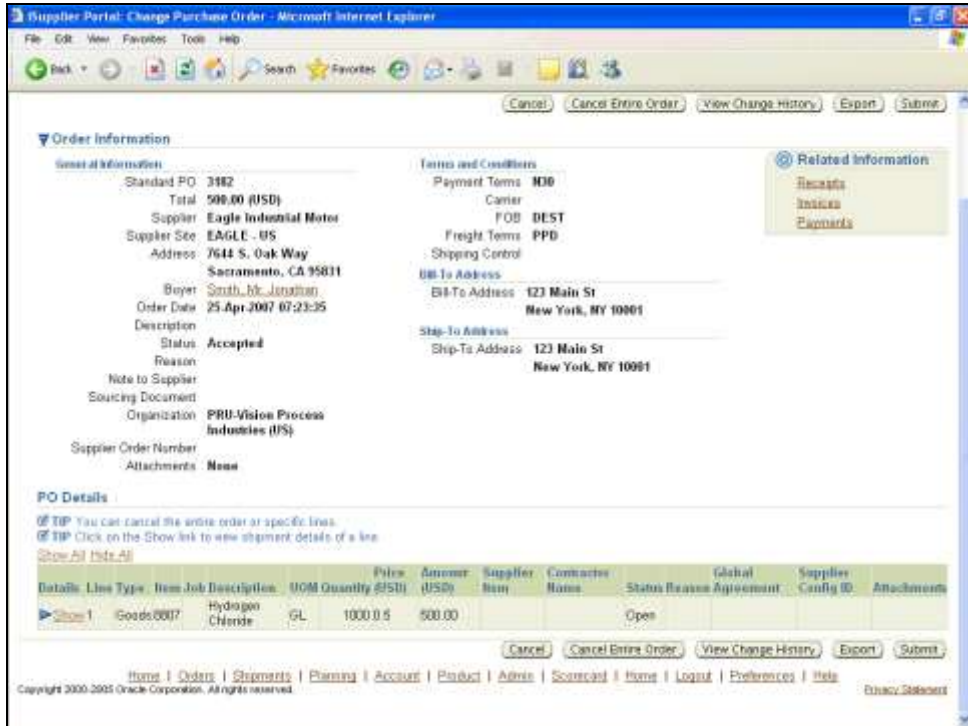
Step	Action
2.	<p>Open the View Purchase Orders window. The iSupplier Portal Home Page displays.</p> <p>Click on the Orders tab or the PURCHASE ORDERS link.</p>
3.	<p>Select Purchase Order 3182 in preparation for performing an action on it. The LAST 25 PURCHASE ORDERS option display. This example has less than 25 purchase orders.</p> <p>Select the appropriate purchase order.</p> <p>Click in the Radio Button to select Purchase Order 3182.</p> <p><input type="radio"/></p>




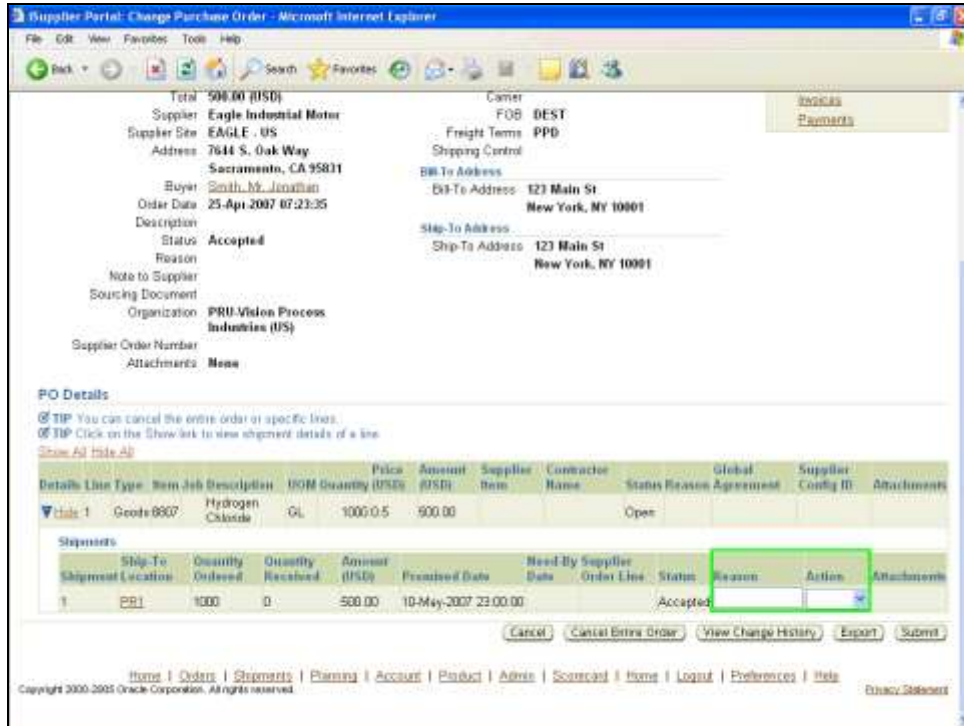
Step	Action
4.	<p>Initiate a request for cancellation of the purchase order.</p> <p>Click on REQUEST CANCELLATION.</p> <p><input type="button" value="Request Cancellation"/></p>
5.	<p>Click SHOW in the <i>PO Details</i> region to display individual PO lines.</p> <p>On the shipment lines you want to cancel, select CANCEL from the ACTION field's pull-down menu and enter a cancellation reason in the REASON field.</p> <p>Click on SUBMIT.</p>



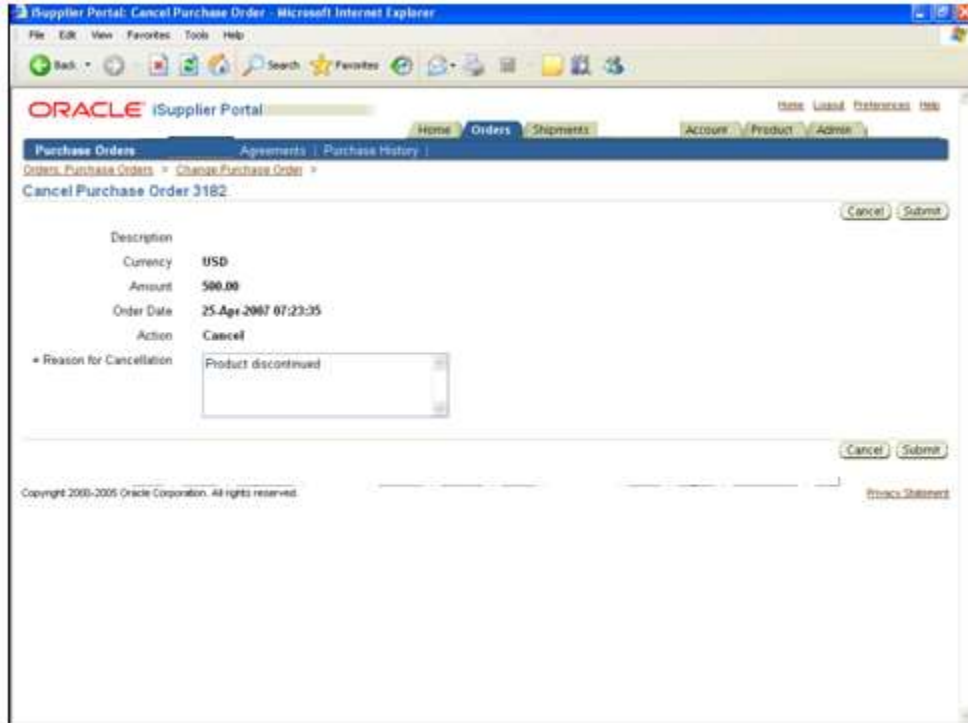
Step	Action
6.	<p>Click on the window feature used to display additional fields hidden below the viewing area. The purchase order record displays.</p> <p>In this example, the purchase order being cancelled has a single product line.</p> <p>To cancel selected shipments from a multi-line purchase order, but not the entire order, scroll down to the <i>PO Details</i> region.</p> <p>Click on the SCROLL DOWN ARROW to simulate scrolling.</p> 



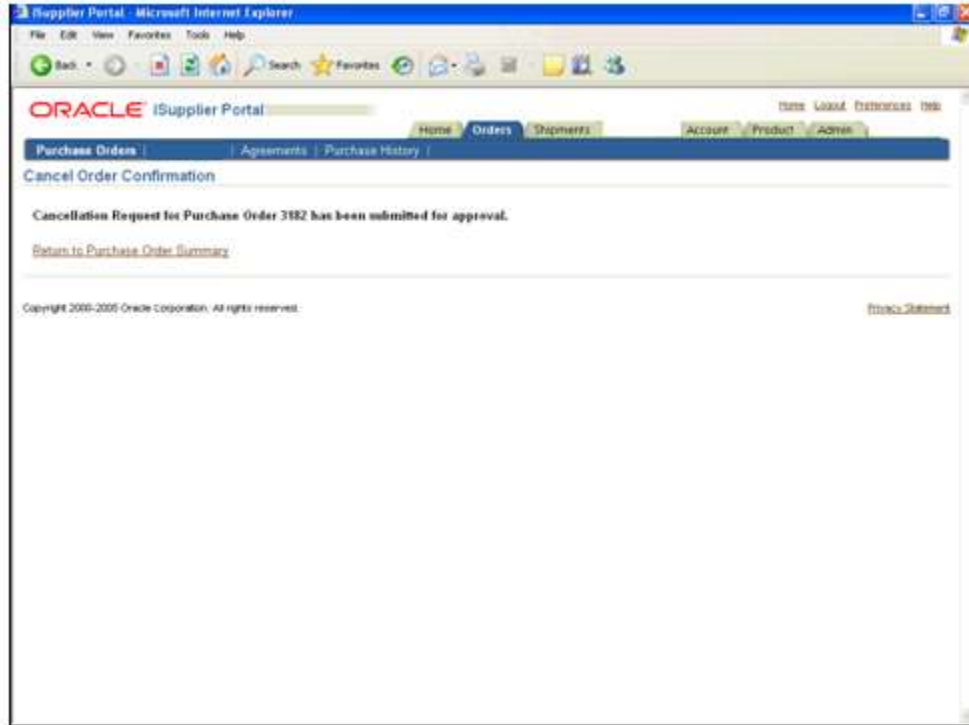
Step	Action
7.	In the PO Details region, display individual PO lines. Click on SHOW . 



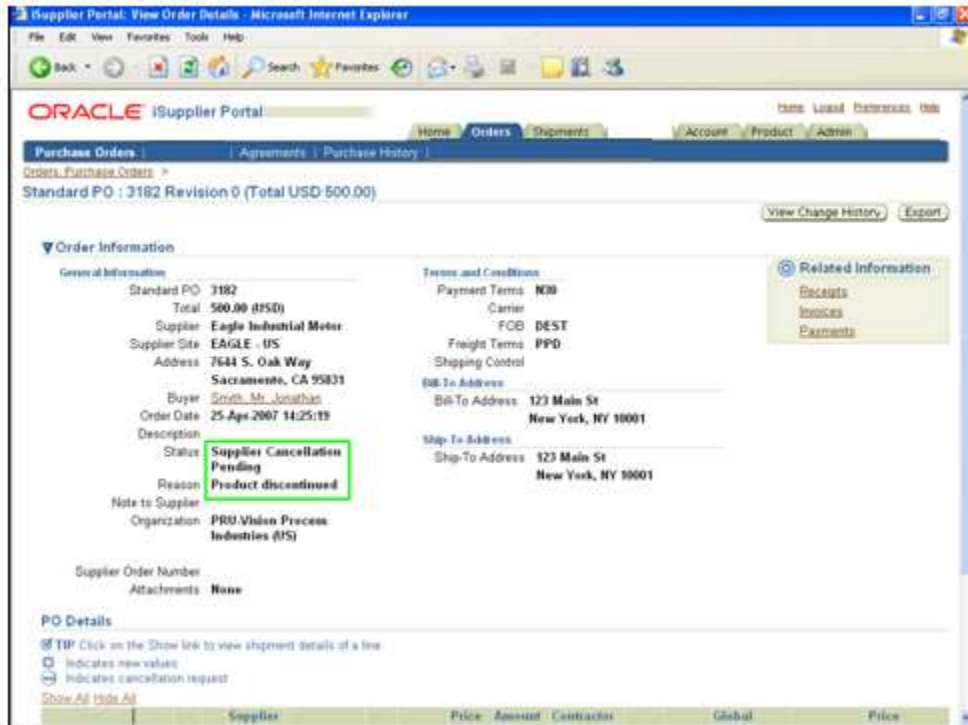
Step	Action
8.	<p>On the shipment lines you want to cancel, select CANCEL from the ACTION field's pull-down menu and enter a cancellation reason in the REASON field.</p> <p>Cancel the entire purchase order in this example.</p> <p>Click on CANCEL ENTIRE ORDER.</p> <p><input type="button" value="Cancel Entire Order"/></p>
9.	<p>The reason the PO is being canceled is Product discontinued. Enter that value in the appropriate field. In the Cancel Purchase Order window, enter a reason for the cancellation.</p> <p>Type Product discontinued in the REASON FOR CANCELLATION field.</p>



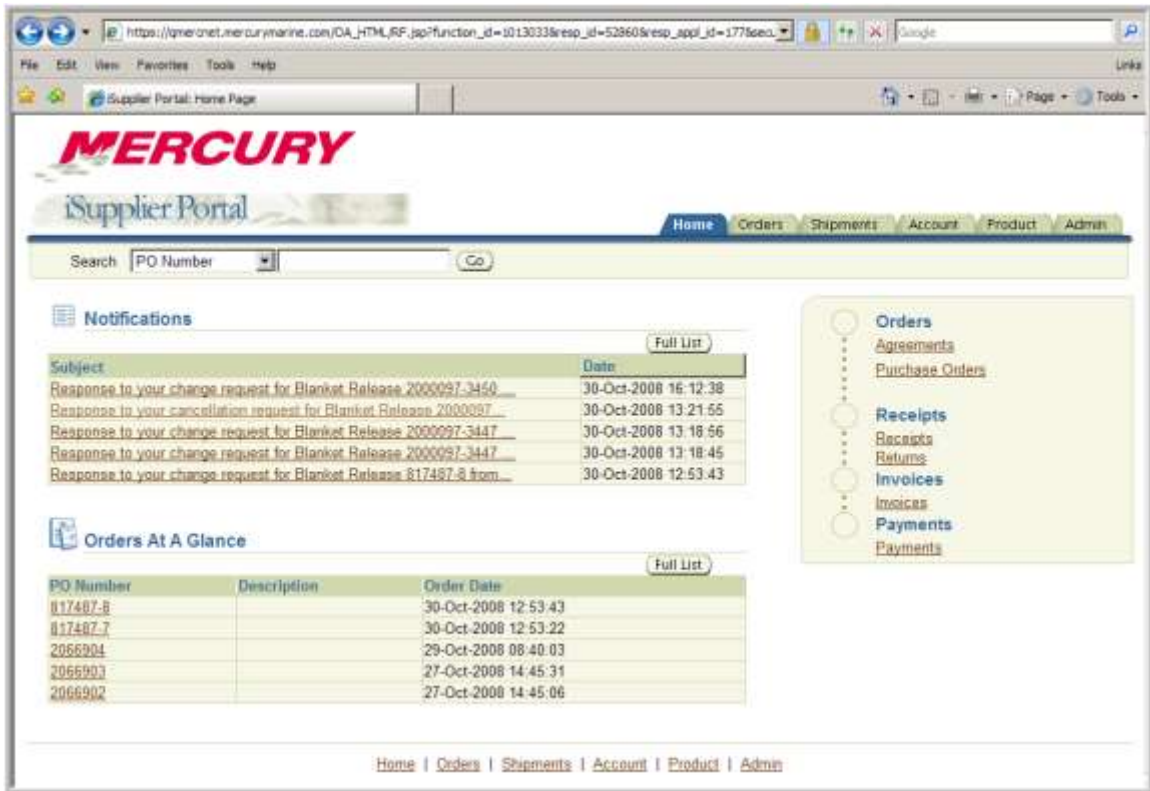
Step	Action
10.	Submit the cancellation request. Click on SUBMIT .



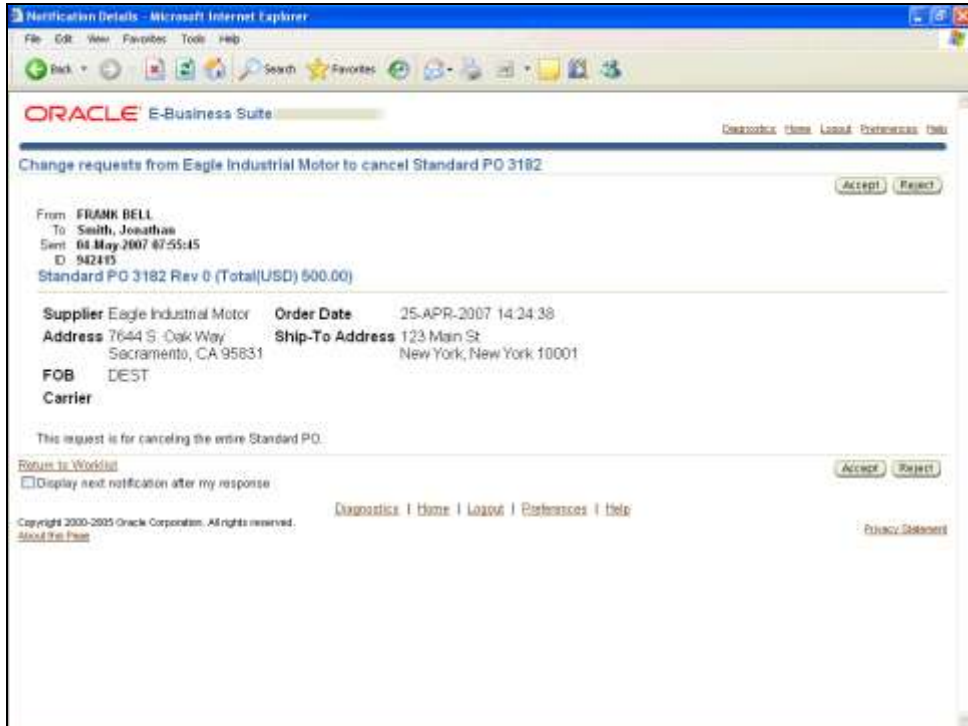
Step	Action
11.	<p>A system message verifies that the cancellation request has been submitted.</p> <p>Return to the purchase order record summary.</p> <p>Click on the RETURN TO PURCHASE ORDER SUMMARY link.</p> <p>Return to Purchase Order Summary</p>



Step	Action
12.	<p>The PO status is updated and the cancellation reason displays.</p> <p>Return to the iSupplier Portal Home Page.</p> <p>Click on the Home tab or HOME link.</p>



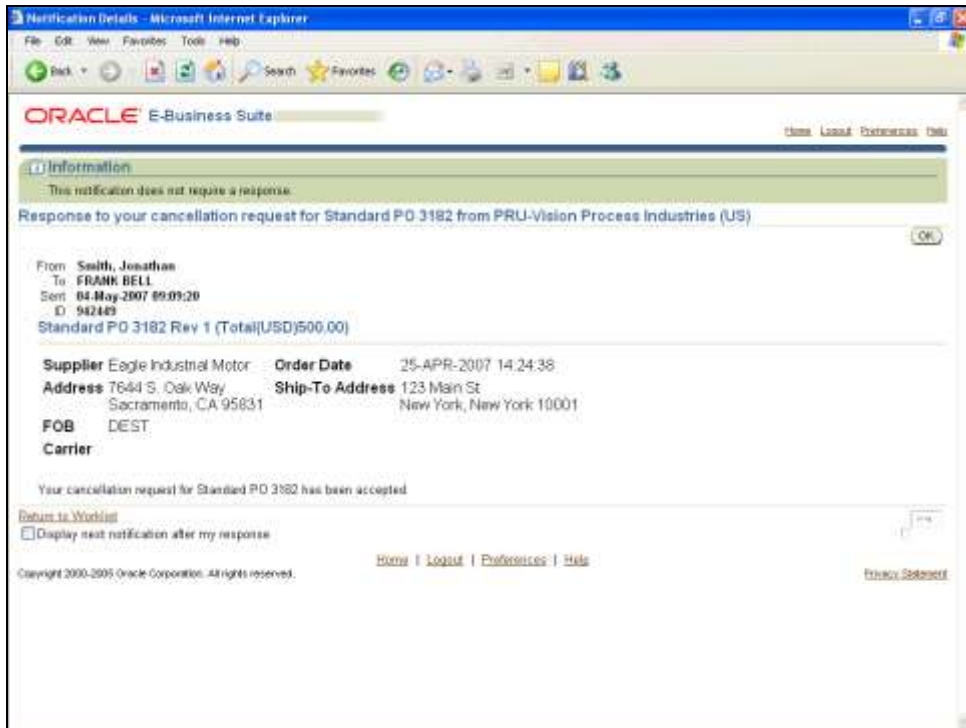
Step	Action
13.	<p>Open the notification requesting cancellation of PO 3182. This view shows the Workflow notification received by the initiating buyer that the supplier is requesting cancellation of the purchase order.</p> <p>Click on the Change requests... link to open it.</p>




Step	Action
14.	Accept or reject the request. Click on ACCEPT .



Step	Action
15.	<p>Open the buyer's response to the supplier's cancellation request. This view shows the notification received by the supplier in response to the cancellation request.</p> <p>Click on the Response to your cancellation... link to open it.</p>



Step	Action
16.	Acknowledge the notification. Click on OK . 
17.	In this lesson, you learned how a supplier requests cancellation of a purchase order in Oracle iSupplier. End of Procedure.

04 Request a Purchase Order Change

Procedure

Description:

After a supplier receives a purchase order, the supplier may request to change the purchase order or individual lines on the purchase order.

For example, the supplier may need to change a part number, a delivery date, or modify a quantity.

Use this procedure to request a change to a purchase order.

Oracle Prerequisites:

- A purchase order has been created, approved, and forwarded to the supplier.
- The purchase order status is OPEN.

NOTE: These scenarios are for training purposes only. They are used as EXAMPLES and do not represent actual data.

Step	Action
1.	<p>This procedure may be performed using the ISUPPLIER FULL PORTAL ACCESS responsibility.</p> <p>To complete this procedure, follow the menu path: ISUPPLIER PORTAL: HOME PAGE.</p>

MERCURY
iSupplier Portal

Home | Orders | Shipments | Account | Product | Admin

Search PO Number [] Go

Notifications [Full List](#)

Subject	Date
Response to your change request for Blanket Release 2000098-1302	05-Nov-2008 12:11:11
Response to your change request for Blanket Release 2000097-3448	05-Nov-2008 12:10:42
Response to your change request for Blanket Release 817487-6 from	05-Nov-2008 12:09:38
Response to your change request for Blanket Release 2000097-3446	05-Nov-2008 10:40:46
Response to your change request for Blanket Release 2000097-3450	05-Nov-2008 10:40:06

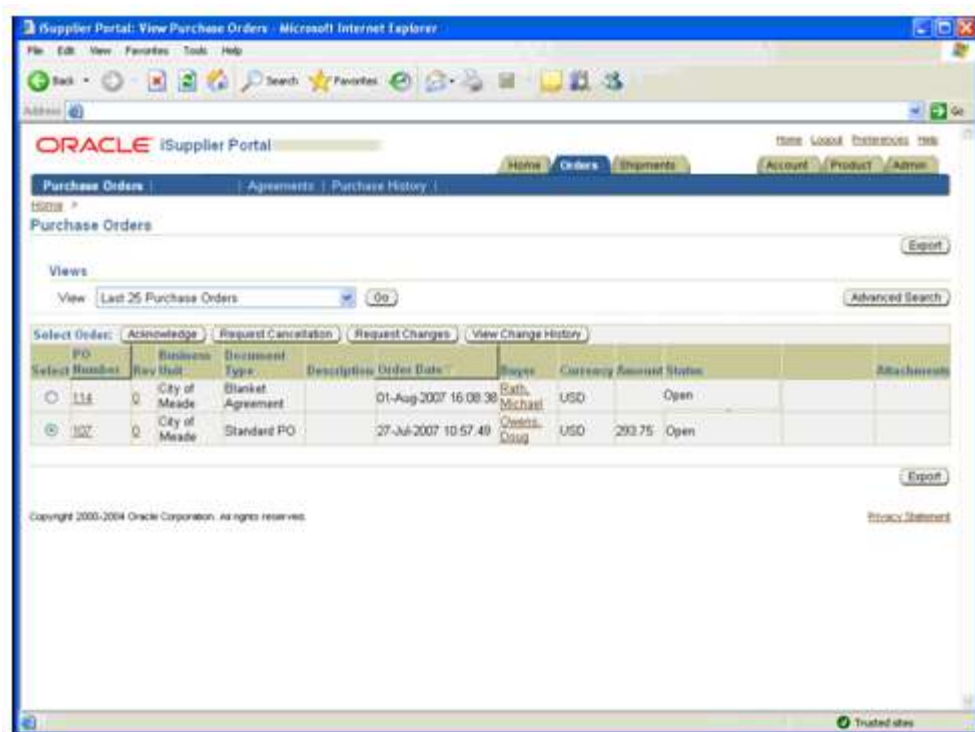
Orders At A Glance [Full List](#)

PO Number	Description	Order Date
2000098-1302		05-Nov-2008 12:11:11
2000097-3448		05-Nov-2008 12:10:41
817487-6		05-Nov-2008 12:09:37
2000097-3446		05-Nov-2008 10:40:46
2000097-3450		05-Nov-2008 10:39:57

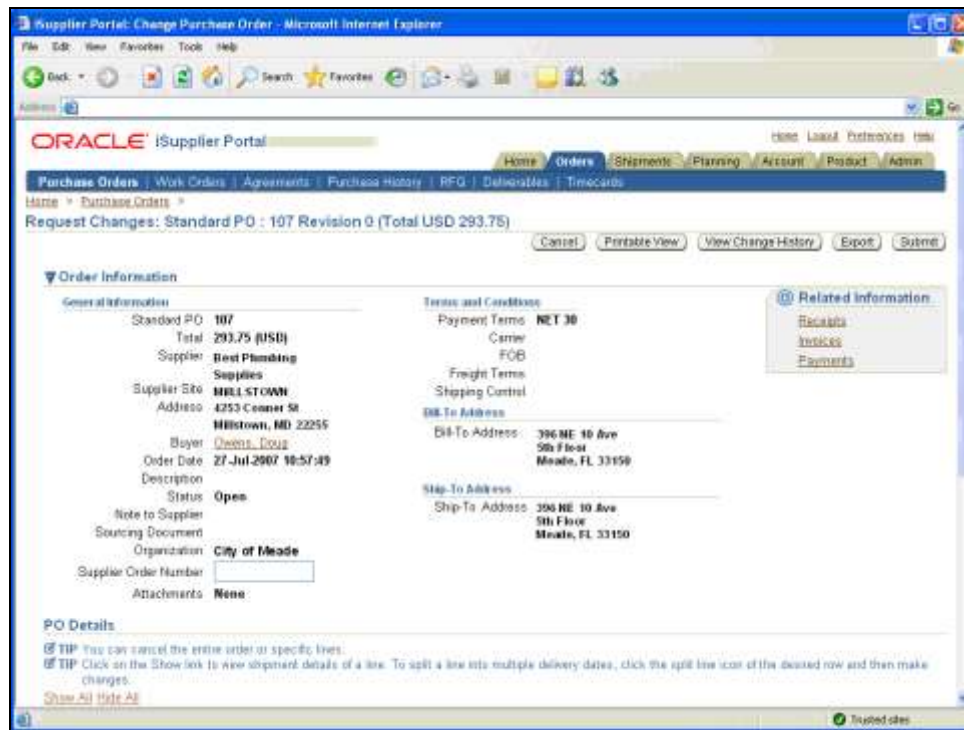
Home | Orders | Shipments | Account | Product | Admin

Orders
Agreements
Purchase Orders
Receipts
Returns
Invoices
Payments
Payments


Step	Action
2.	<p>Open the <i>View Purchase Orders</i> window. The iSupplier Portal Home Page displays. The <i>Orders at a Glance</i> region contains the supplier's five most recent purchase orders.</p> <p>Optionally click on the appropriate purchase order number link to open the document.</p> <p>Clicking on the <i>Orders</i> tab or the PURCHASE ORDERS link in the navigation pane is equivalent to clicking on FULL LIST in the <i>Orders at a Glance</i> region.</p> <p>Click on PURCHASE ORDERS.</p>
3.	<p>Select PO 107 in preparation for performing an action on it. Select the purchase order on which an action will be performed.</p> <p>Click on the Radio Button to select the PO 107.</p> <p><input type="radio"/></p>

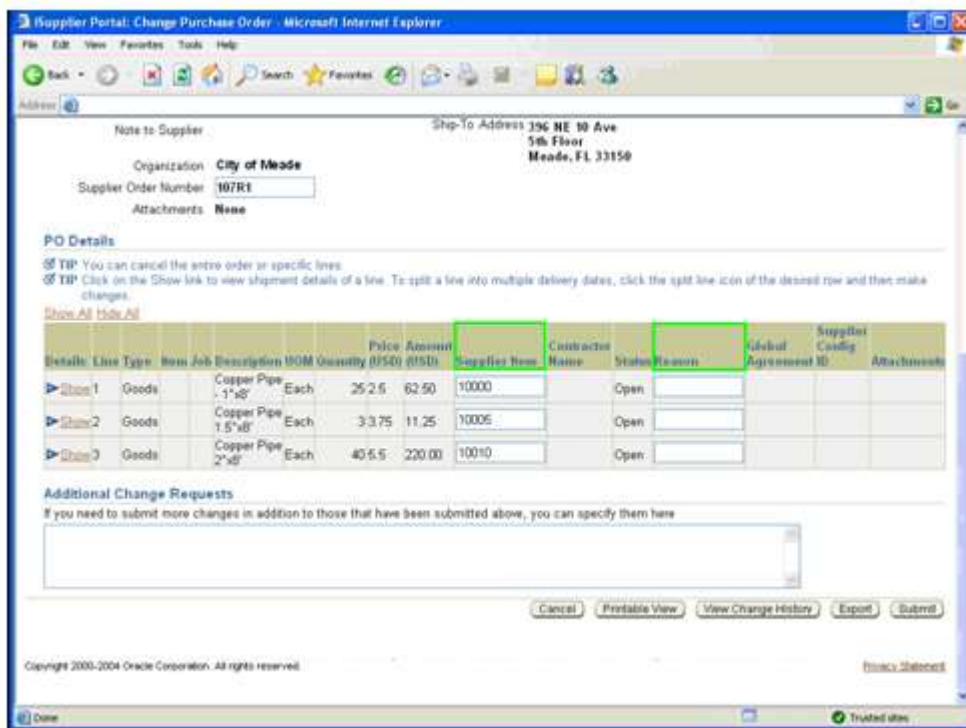


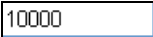
Step	Action
4.	<p>Initiate a purchase order change request.</p> <p>Click on REQUEST CHANGES.</p> <p><input type="button" value="Request Changes"/></p>



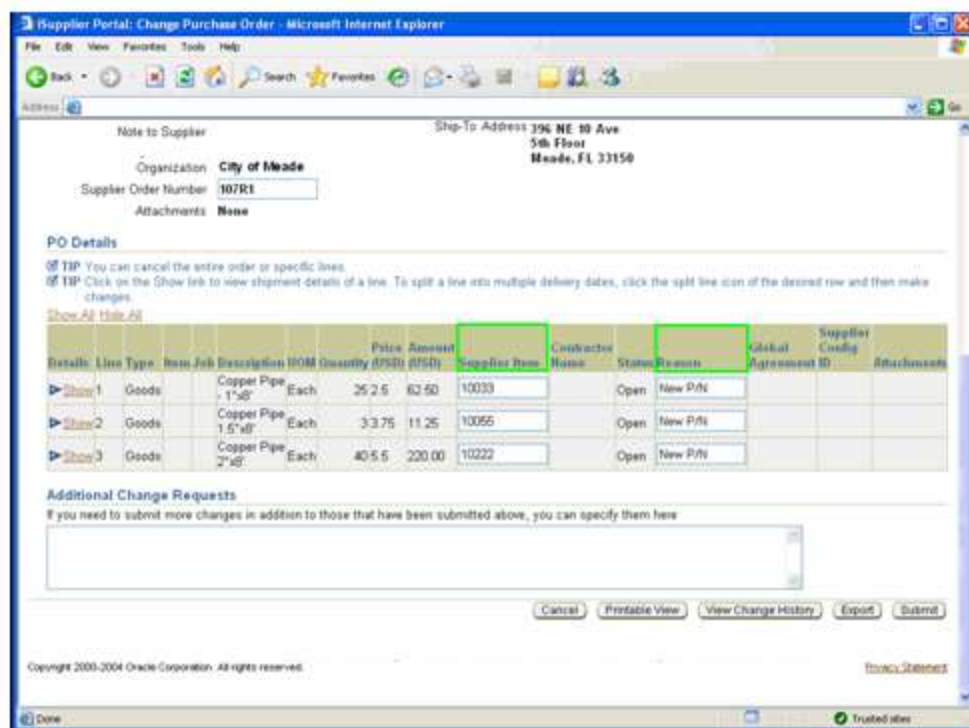
Step	Action
5.	<p>The supplier's internal number for this purchase order is 107R1 in this example.</p> <p>Enter that value in the appropriate field. The purchase order record displays. Review and make any necessary changes.</p> <p>The <i>Order Information</i> region contains general purchase order information that defaults from the purchase order record.</p> <p>Click on any of the links in the <i>Related Information</i> region to view additional purchase order information.</p> <p>Enter a supplier order number.</p> <p>Type 107R1 in the SUPPLIER ORDER NUMBER field.</p>


Step	Action
6.	<p>Click on the window feature used to display information hidden below the viewing area.</p> <p>Click on the SCROLL DOWN ARROW to simulate scrolling to the bottom of the window.</p> 

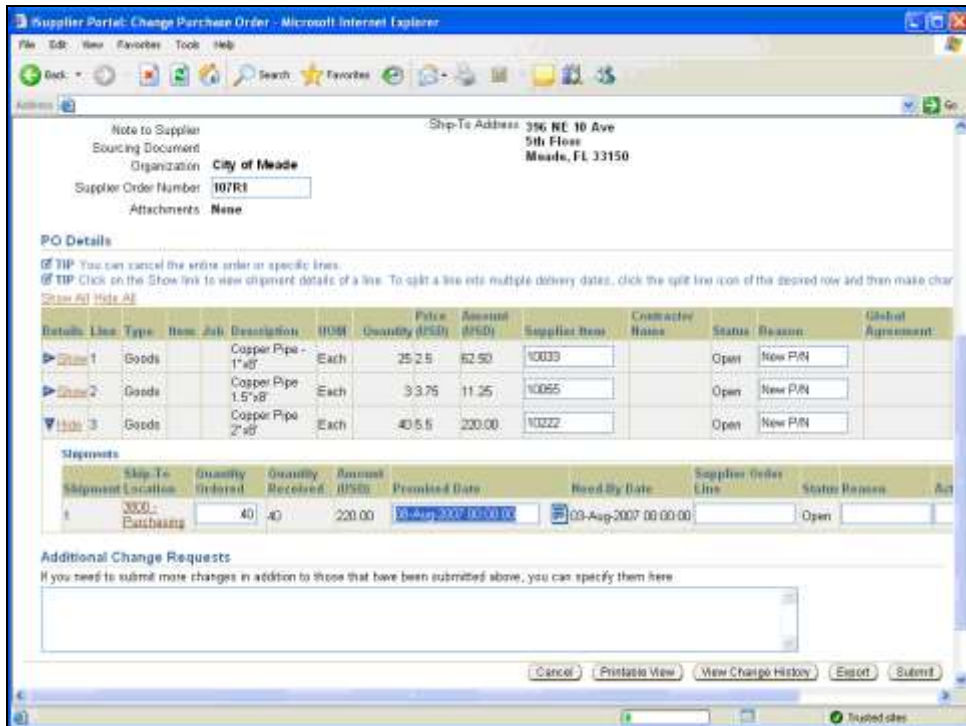


Step	Action
7.	<p>Use a mouse click to select the Line 1 supplier item number. The goods or services included in the purchase order are listed in the table.</p> <p>In this example, the supplier has changed item numbers. Enter the new supplier item number for the goods or services in the appropriate SUPPLIER ITEM field.</p> <p>Click in the SUPPLIER ITEM field for PO line 1 to select it.</p> 
8.	<p>Use a keyboard action to delete the selected value.</p> <p>Press the [DELETE] key on your keyboard to delete the existing value.</p>

Step	Action
9.	The new supplier item number for 1" X 8' Copper Pipe is 10033. Type 10033 in the SUPPLIER ITEM field.
10.	The reason for the change is New P/N. Enter that value in the appropriate field. Enter a reason for the change. Type New P/N in the REASON field.



Step	Action
11.	View details for Line 3. The remaining PO items have been changed for you, and reason codes added. View shipment details for Line 3 of the purchase order. Click on the SHOW link or EXPAND (+) icon for PO Line 3. 



Step	Action
12.	<p>Submit the changes. The shipment details display for Line 3.</p> <p>There are several additional updatable fields in the <i>Shipments</i> subtable.</p> <p>Click on SUBMIT.</p> <p><input type="button" value="Submit"/></p>

SHIP-TO LOCATION: Optional. Click on the link to view detailed shipping information.

QUANTITY ORDERED: Enter a new order quantity, if appropriate.

QUANTITY RECEIVED: The quantity already received displays in the field.

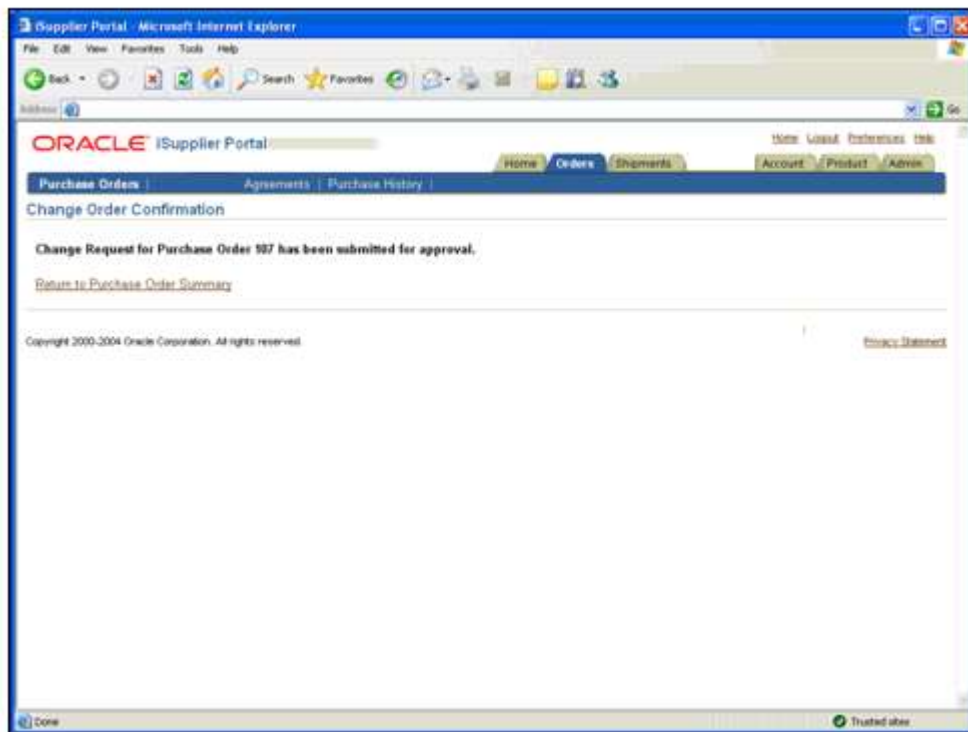
PROMISED DATE: If the requested change is for the promise date, select a new promise date from the field's Calendar List of Values.

SUPPLIER ORDER LINE: Enter the supplier order line number to reference against the purchase order.

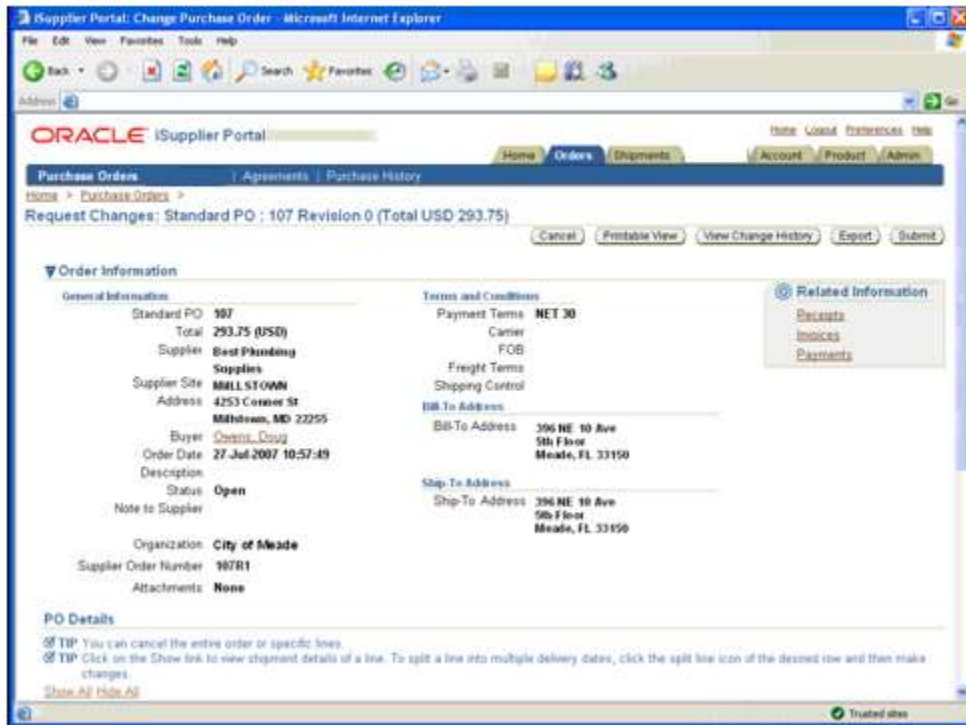
REASON: Enter the reason for the change or cancellation.


ACTION: Select the appropriate action from the field's pull-down menu. Options are **CHANGE** and **CANCEL**. In this example, a partial shipment has already been sent, and the balance outstanding will be adjusted due to a stock shortage.

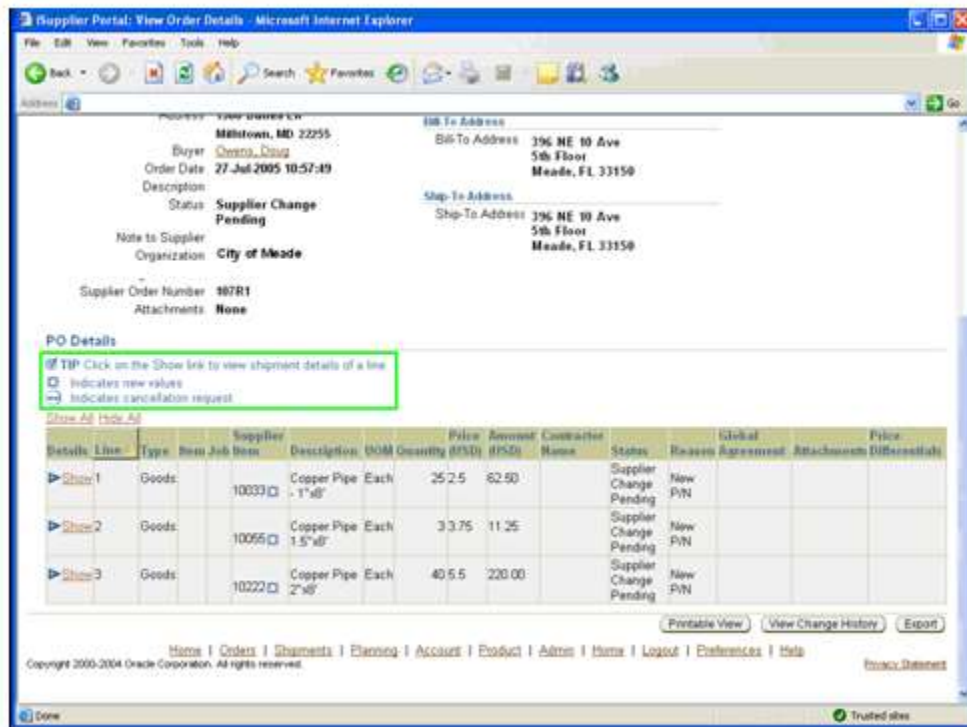
SPLIT: Optional. Click on the **SPLIT** icon to split the line item. This selection could be made if a shipment were to be split into two dates instead of one shipment.



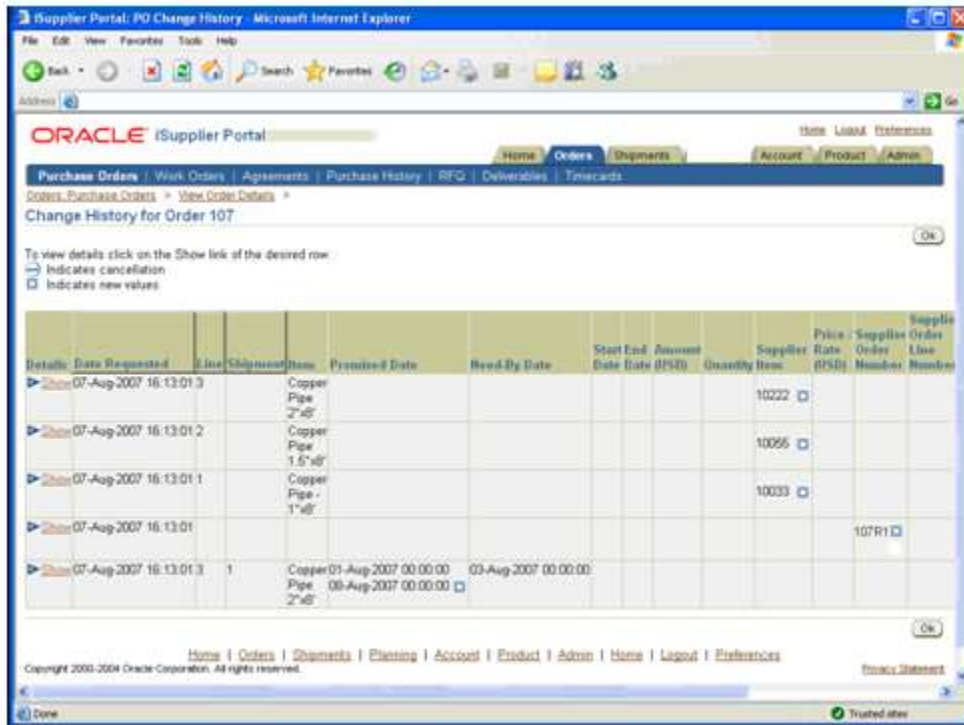
Step	Action
13.	<p>A <i>Confirmation</i> message verifies that the change request has been submitted for approval.</p> <p>Return to the <i>Change Purchase Order</i> window.</p> <p>Click on the RETURN TO PURCHASE ORDER SUMMARY link.</p> <p>Return to Purchase Order Summary</p>



Step	Action
14.	<p>Click on the window feature used to display information hidden below the viewing area.</p> <p>Click on the Scroll Down Arrow to simulate scrolling to the bottom of the window.</p> 



Step	Action
15.	<p>View the PO change history. Updated line information displays in the <i>PO Details</i> region, with the changes indicated by a blue sunburst icon in the SUPPLIER ITEM field.</p> <p>SUPPLIER ITEM: The icons displayed in this column indicate these are new values.</p> <p>STATUS: The status for the purchase order indicates the submitted changes have not been approved and are still pending.</p> <p>REASON: If a reason was entered for the change, it appears in this field.</p> <p>View the change history for this purchase order.</p> <p>Click on VIEW CHANGE HISTORY.</p> <p><input type="button" value="View Change History"/></p>



Step	Action
16.	The entire change history for the purchase order displays. Click on the HOME link or tab, or click OK.
17.	In this lesson, you learned how to request a change to a purchase order in Oracle iSupplier. End of Procedure.

Mercury Portal Navigation

Portal Navigation

01 The Oracle 11i Home Page (Framework Mode)

Procedure

Description:

After logging in to Oracle, the first screen is the Oracle 11i *Home Page*. The *Home Page* allows you to navigate directly to **functions** (or **transactions**) in any **responsibility** you have access to, view and edit *Preferences*, and set up *Favorites* to link to **forms** or web sites you use often.

This lesson shows you how to edit *Preferences* and set up *Favorites*.

Oracle Prerequisites:

- There are no prerequisites to this procedure.



A **function** is a stored procedure that defines business rules, performs automated tasks within an application, or retrieves application information. The stored procedure accepts standard arguments and returns a completion result.



Transactions are invoices, debit memos, credit memos, deposits, guarantees and chargebacks entered with a GENERAL LEDGER (GL) date that is between the beginning and ending GL dates.




A **responsibility** is a level of authority set up by your system administrator in Oracle Applications. It lets you access a specific set of windows, menus, set of books, reports, and data in an Oracle application. Several users can share the same responsibility, and a single user can have multiple responsibilities.




A **form** is a box around a set of related information on your screen. Many windows can appear on your screen simultaneously and can overlap or appear adjacent to each other. Windows can also appear embedded in other windows. You can move a window to a different location on your screen.




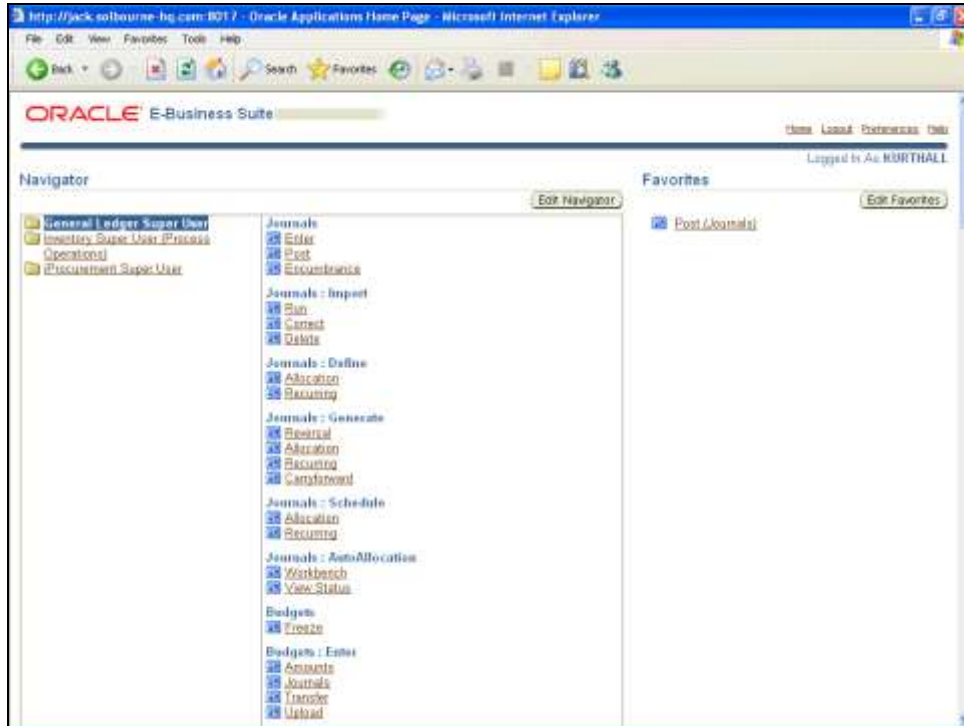
Step	Action
1.	It is not necessary to select a responsibility to perform this procedure.
2.	This is the <i>Home Page</i> in Oracle 11i. The left side of the <i>Navigator</i> region identifies all responsibilities assigned to you. Clicking on a responsibility link displays the functions (or transactions) associated with the responsibility.

 The *Navigator* shows a list of links to responsibilities either in the Oracle Applications or the Self Service Applications.

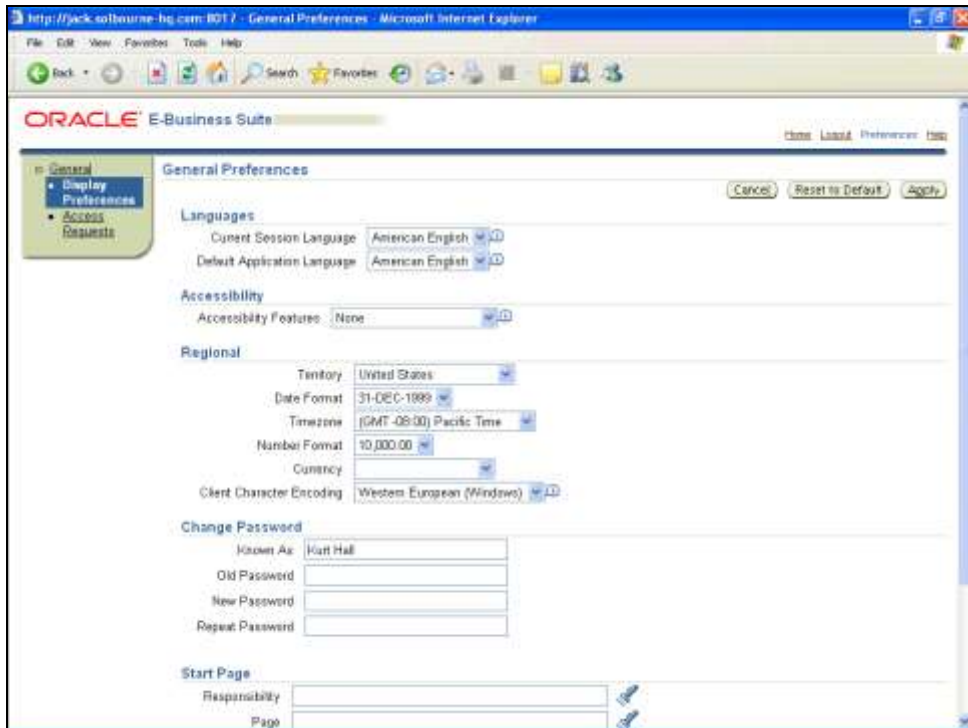
 A **region** is a collection of logically-related fields set apart from other fields by lines creating a block. Regions help to organize a block so that it is easier to understand.

Step	Action
3.	<p>After selecting a responsibility, the functions (or transactions) associated with the responsibility display in the right portion of this region. This list is what you utilize to carry out computer-related work tasks.</p> <p>In this lesson, the GENERAL LEDGER SUPER USER responsibility functions are displayed. The links here directly correspond to the forms in the <i>Navigator</i> window of that responsibility and was demonstrated in a previous lesson.</p>

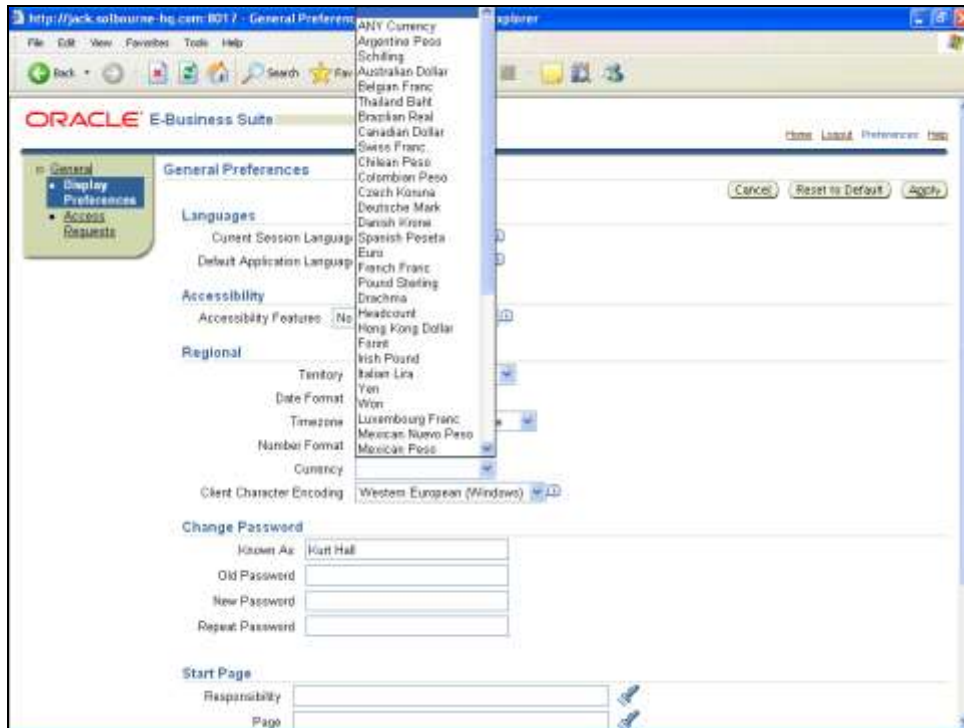
 A **window** is a box around a set of related information on your screen. Many windows can appear on your screen simultaneously and can overlap or appear adjacent to each other. Windows can also appear embedded in other windows. You can move a window to a different location on your screen.




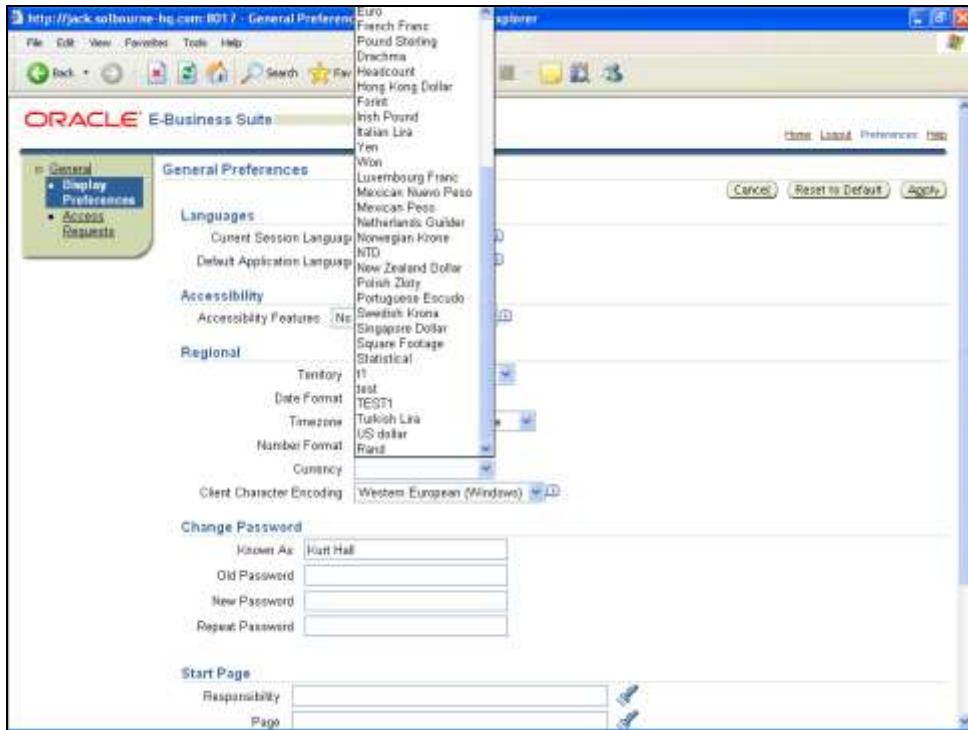
Step	Action
4.	<p>To make changes to the way the Oracle pages appear on the screen, access to the <i>General Preferences</i> page is located on the <i>Home Page</i>. The <i>General Preferences</i> page is used to change certain standard settings, such as the language used, notification and formatting styles, and passwords.</p> <p>Click on the PREFERENCES link.</p> <p>Click on the link that allows you to make changes to the way the Oracle pages appear on the screen.</p> <p><u>Preferences</u></p>
5.	<p>The <i>General Preferences</i> page is used to change certain standard settings, such as the language used, notification and formatting styles, and passwords.</p>



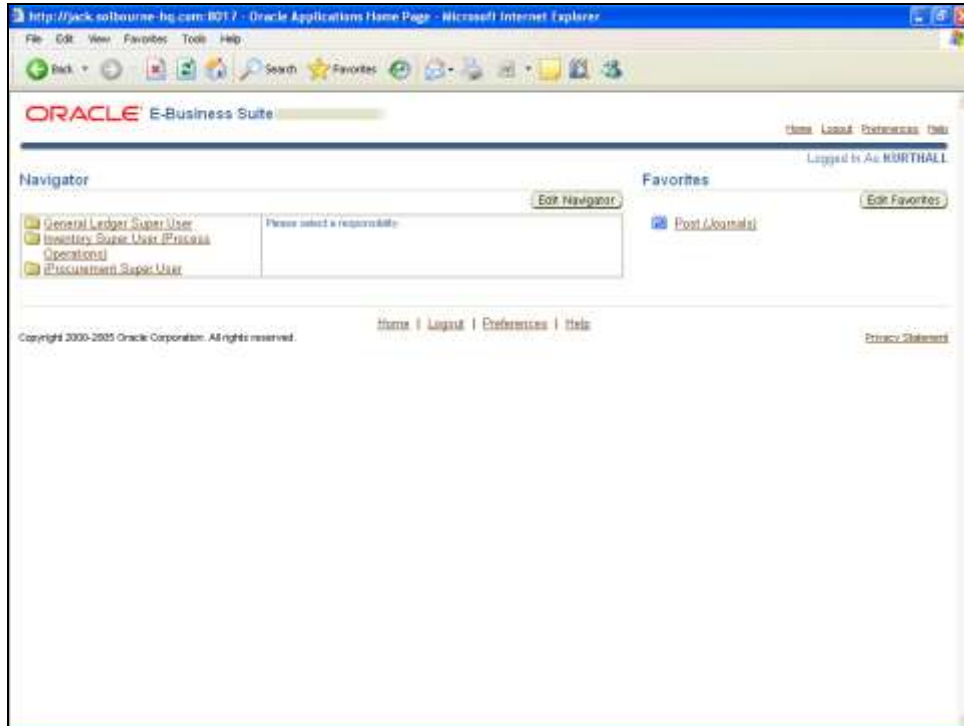
Step	Action
6.	<p>In this lesson, the CURRENCY field is not defined. Change this setting to US dollar.</p> <p>Click on the Down Arrow inn the Currency field.</p> <div data-bbox="370 1226 407 1262" style="border: 1px solid black; width: 23px; height: 17px; text-align: center; line-height: 17px;">▼</div>



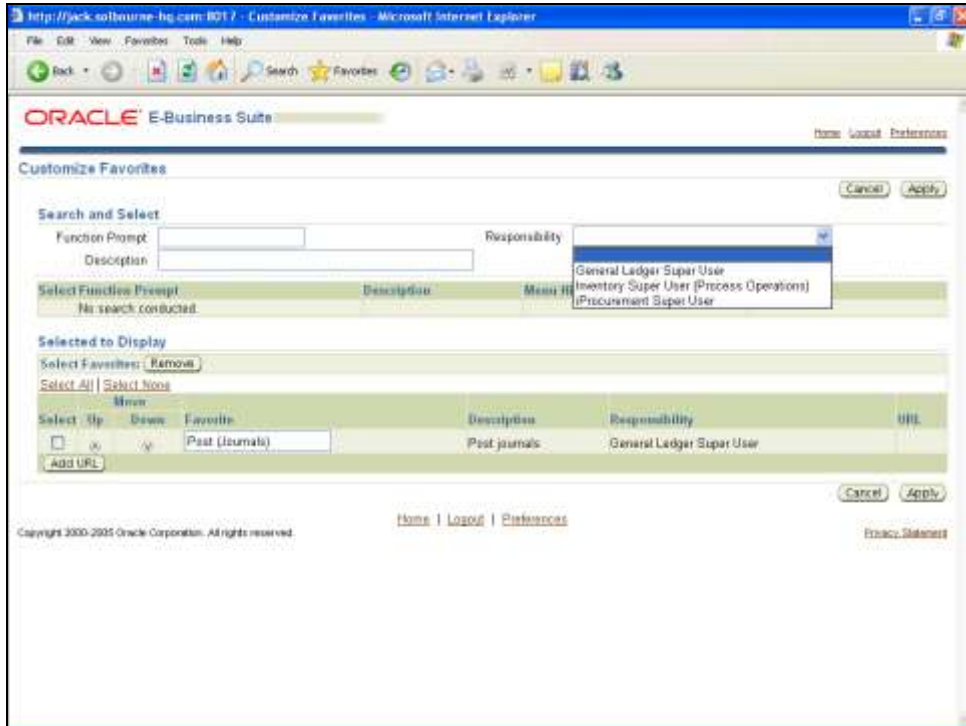
Step	Action
7.	Use the SCROLL BAR to locate the desired currency. Click on the Scroll Down Arrow until US dollar appears. 



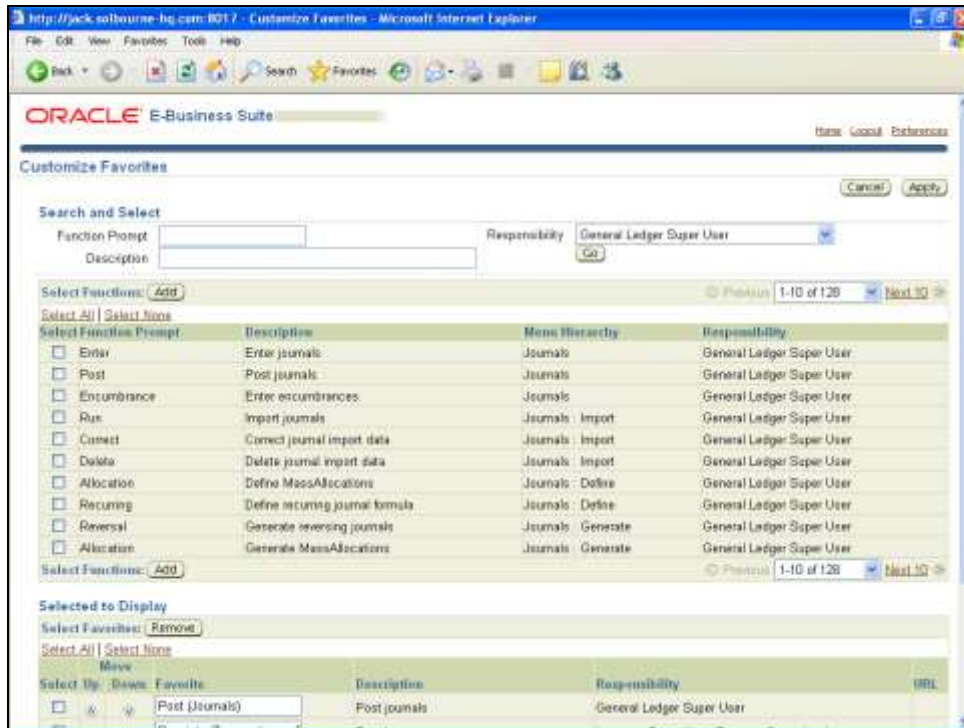
Step	Action
8.	Click on US dollar . <input type="text" value="US dollar"/>
9.	Click on the APPLY button to accept the changes made to the default setup in the <i>General Preferences</i> window. Click on APPLY . <input type="button" value="Apply"/>
10.	Return to the <i>Home Page</i> by clicking on the HOME link located near the upper right side of this page. Click on the HOME link. <input type="button" value="Home"/>



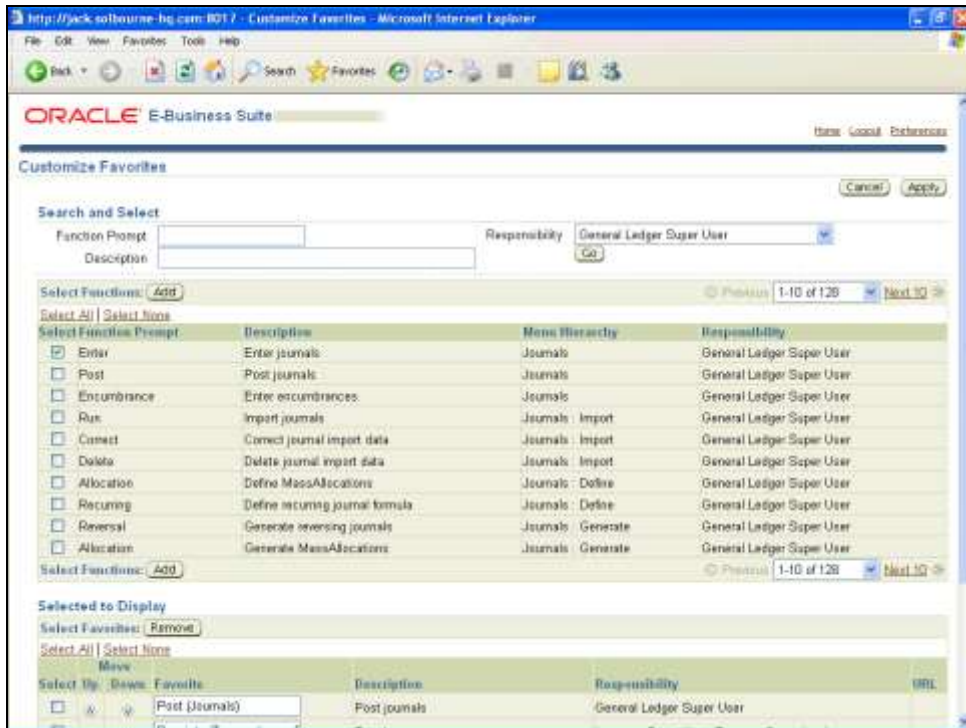
Step	Action
11.	<p>Another customizable section of the <i>Home Page</i> is the <i>Favorites</i> region.</p> <p>Click on EDIT FAVORITES.</p> <p>Select another customizable section of the <i>Home Page</i>.</p> <p><i>Favorites</i> is a list set up by each user of commonly-accessed Oracle forms, web sites, or other links.</p> <p><input type="button" value="Edit Favorites"/></p>
12.	<p><i>Favorites</i> is a list set up by each user of commonly-accessed Oracle forms, web sites, or other links.</p>
13.	<p>Begin adding links to <i>Favorites</i> by selecting a responsibility.</p> <p>Click on the RESPONSIBILITY field Down Arrow.</p> <p><input type="button" value="v"/></p>



Step	Action
14.	<p>For this lesson, use the GENERAL LEDGER SUPER USER responsibility.</p> <p>Click on the GENERAL LEDGER SUPER USER list item.</p> <p><input type="text" value="General Ledger Super User"/></p>
15.	<p>Initiate a search for the functions (or transactions) associated with this responsibility by clicking on the GO button.</p> <p>Click on GO.</p> <p><input type="button" value="Go"/></p>
16.	<p>The results of the search are displayed in the <i>Select Functions</i> region. There are 128 functions (or transactions) associated with the General LEDGER SUPER USER responsibility displayed. To select a function (or transaction) not displayed, click on the NEXT 10 link or the NEXT SET button.</p>




Step	Action
17.	<p>Locate a function (or transaction) to add to the <i>Favorites</i> region and click in the SELECT checkbox to select it.</p> <p>Click in the Checkbox to select that line.</p> <p><input type="checkbox"/></p>



Step	Action
18.	Click on ADD .
19.	Use the SCROLL BAR to view the newly added FAVORITES link at the bottom of the page. Click on the Scroll Down Arrow to view the bottom of the window.
20.	In addition to adding functions (or transactions) to the <i>Favorites</i> list, users can also add frequently accessed web sites such as Oracle. Click on ADD URL .
21.	A new row is added to the bottom of the <i>Selected to Display</i> region. Enter a display name for the link. Reminder: Use the TAB key to move from field to field. This lesson does not require using the TAB key to move to the next field. Type ' Oracle ' in the FAVORITE field .

A **field** is a position on a window used to enter, view, update, or delete information. A field prompt describes each field by telling what kind of

information appears in the field, or alternatively, what kind of information can be entered in the field.

Step	Action
22.	When entering the address of the web site, do not enter “http://” in front of the address. Type ' www.oracle.com ' in the URL field.
23.	Click on the APPLY button to accept the additions made to <i>Favorites</i> . Click on APPLY . 
24.	You are returned to the <i>Home Page</i> . To begin working in Oracle, click on a link in the <i>Navigator</i> region or a <i>Favorites</i> link.
25.	In this lesson, you learned how to edit <i>Preferences</i> and set up <i>Favorites</i> from the Oracle 11i system <i>Home Page</i>. End of Procedure.

02 Navigator Processes


Procedure

Description:

Some **responsibilities** contain a *Processes* tab on the *Navigator*, which contain business process maps related to that responsibility. The processes display in a graphical, flow-based format and allow you to launch forms directly from the *Processes* tab.

Oracle Prerequisites:

- There are no prerequisites to this procedure.



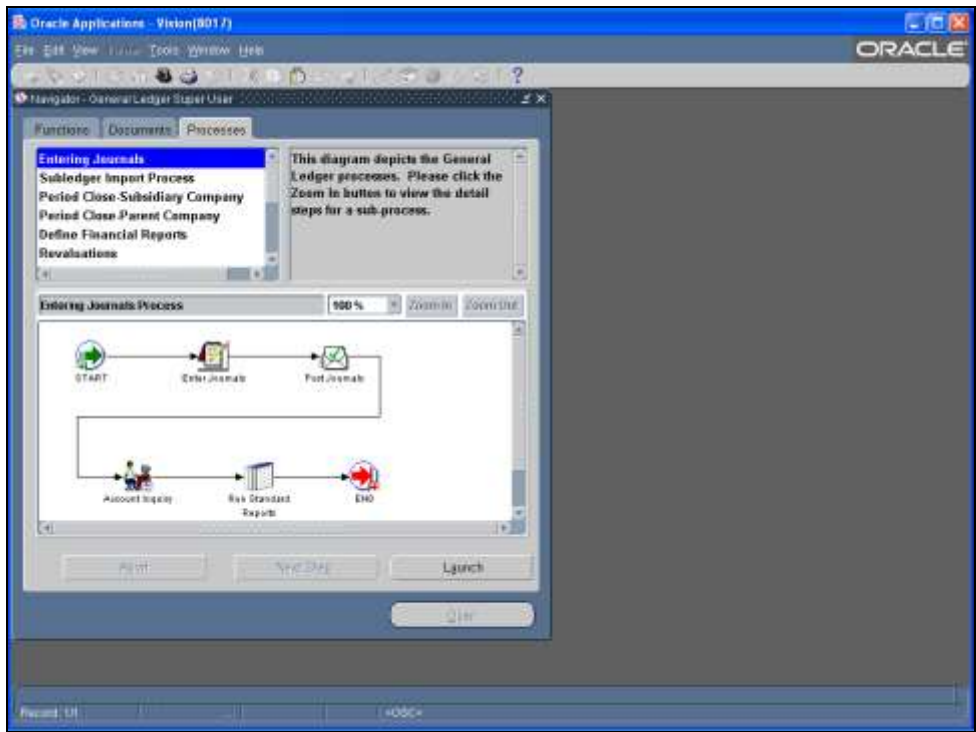
A **responsibility** is a level of authority set up by your system administrator in Oracle Applications. It lets you access a specific set of windows, menus, set of books, reports, and data in an Oracle application. Several users can share the same responsibility, and a single user can have multiple responsibilities.



A **process** is a set of Oracle activities that need to be performed to

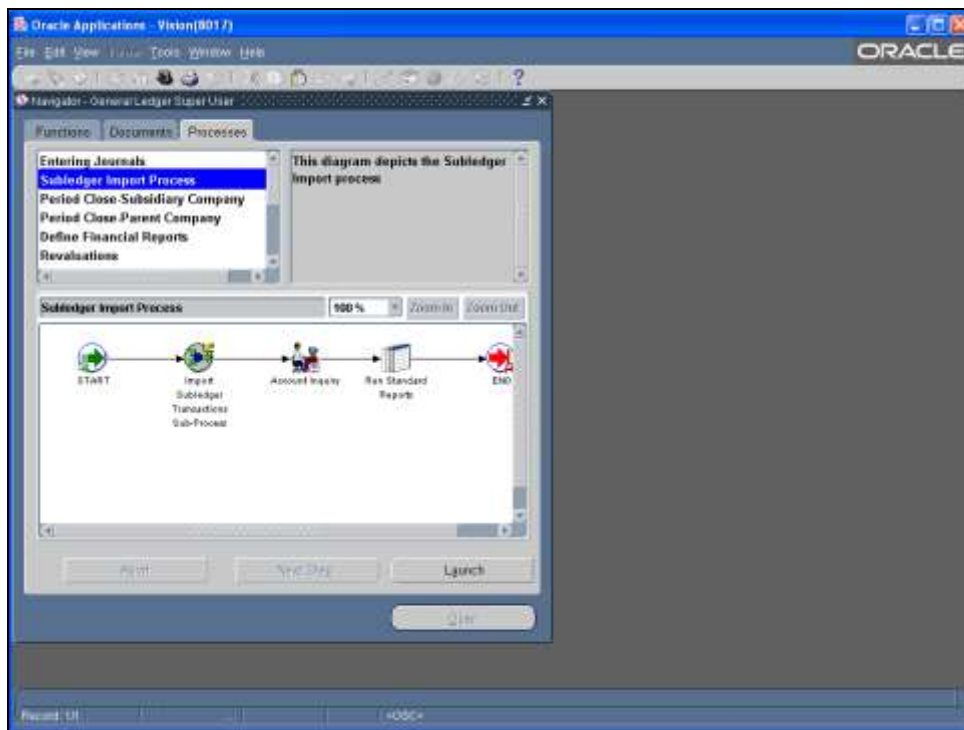
accomplish a business goal.


Step	Action
1.	<p>Not all responsibilities contain a <i>Processes</i> tab. This lesson uses the GENERAL LEDGER SUPER USER responsibility.</p> <p>This procedure begins at the <i>Navigator</i>.</p>
2.	<p>Show the <i>Processes</i> tab by clicking on the tab.</p> <p>Click on the Processes tab.</p> <div style="border: 1px solid gray; padding: 2px; display: inline-block; margin-top: 5px;">Processes</div>

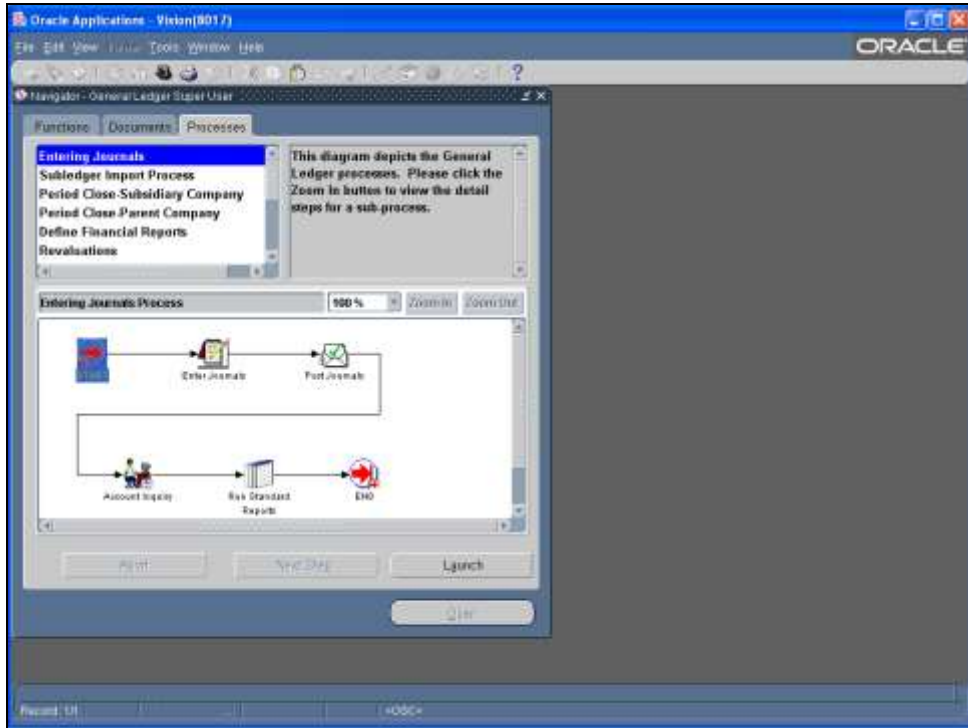


Step	Action
3.	<p>The various processes associated with this responsibility display. The list in the upper left displays the different processes available. The box in the upper right provides explanation of each step in the process or a high-level overview of the process itself. A graphical representation of the process (process map) displays in the lower portion of the tab.</p>

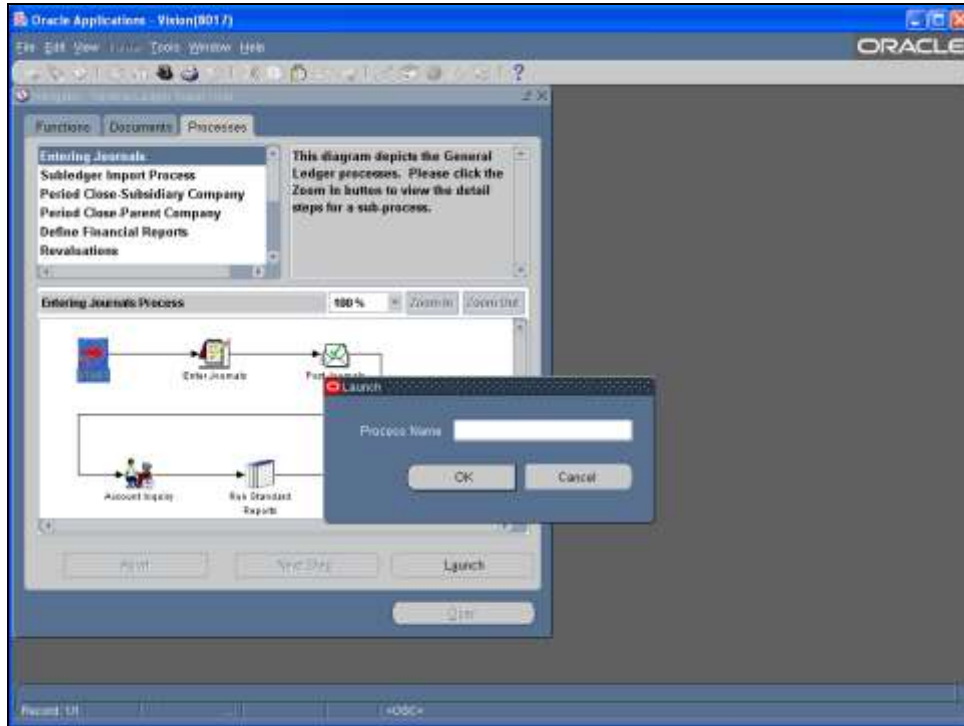
Step	Action
4.	<p>Selecting a process name in the upper left displays that process in the lower portion of the window.</p> <p>View the diagram for the SUBLEDGER IMPORT PROCESS.</p> <p>Click on the SUBLEDGER IMPORT PROCESS name.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">Subledger Import Process</div>




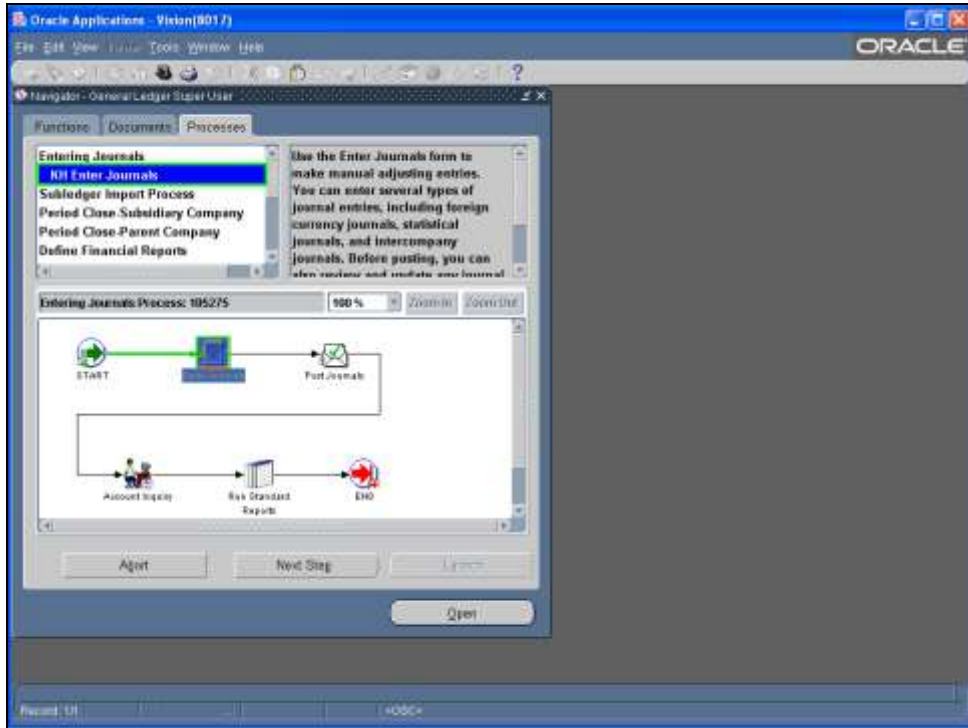
Step	Action
5.	The diagram for the SUBLEDGER IMPORT PROCESS displays.
6.	<p>This lesson returned to the ENTER JOURNALS process for you.</p> <p>Next, select a step in the diagram to view its description in the upper right box.</p> <p>Click on the START step in the process map.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">  START </div>




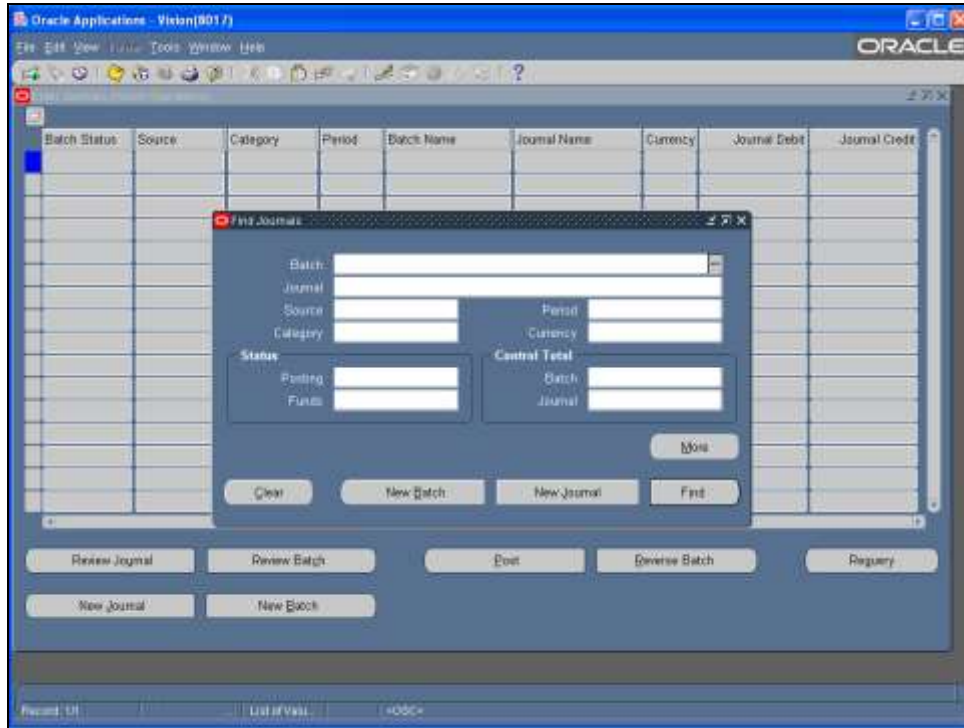
Step	Action
7.	The text in the upper right has changed based on the step selected.
8.	<p>Begin the process by selecting the LAUNCH button.</p> <p>Click on LAUNCH to begin the process.</p> <div style="border: 1px solid black; padding: 5px; width: fit-content; margin: 0 auto;"> <p>Launch</p> </div>



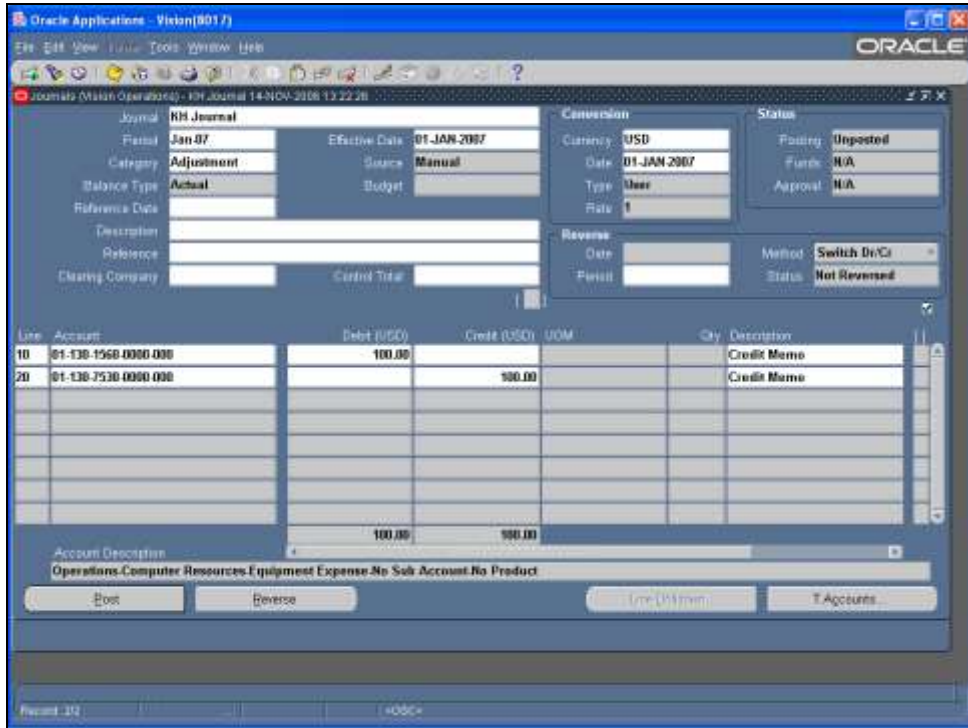
Step	Action
9.	A specific instance of the process is created. Enter a unique name for the process. Type KH Enter Journals in the Process Name field.
10.	Click on OK . 




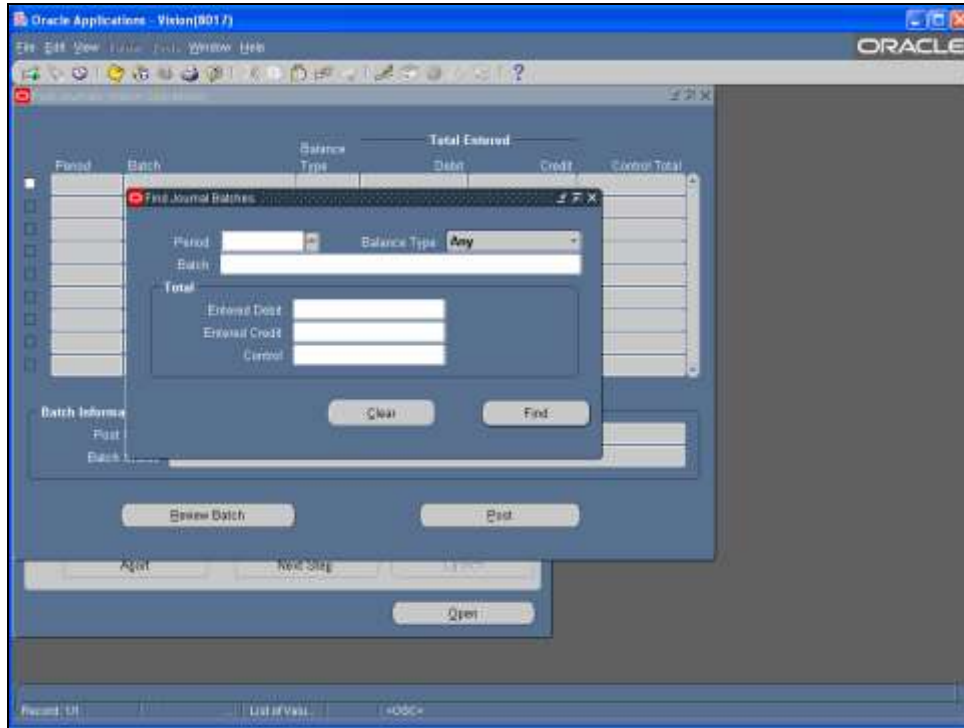
Step	Action
11.	The instance of your process displays in the list in the upper left. The green arrow in the map identifies which stages of the process have completed. The stage that must be completed next is highlighted in green.
12.	<p>To go to the next step in the process, double-click on the step in the process map or click once on the step and click on OPEN.</p> <p>Double-click on the ENTER JOURNAL step in the process map.</p> 



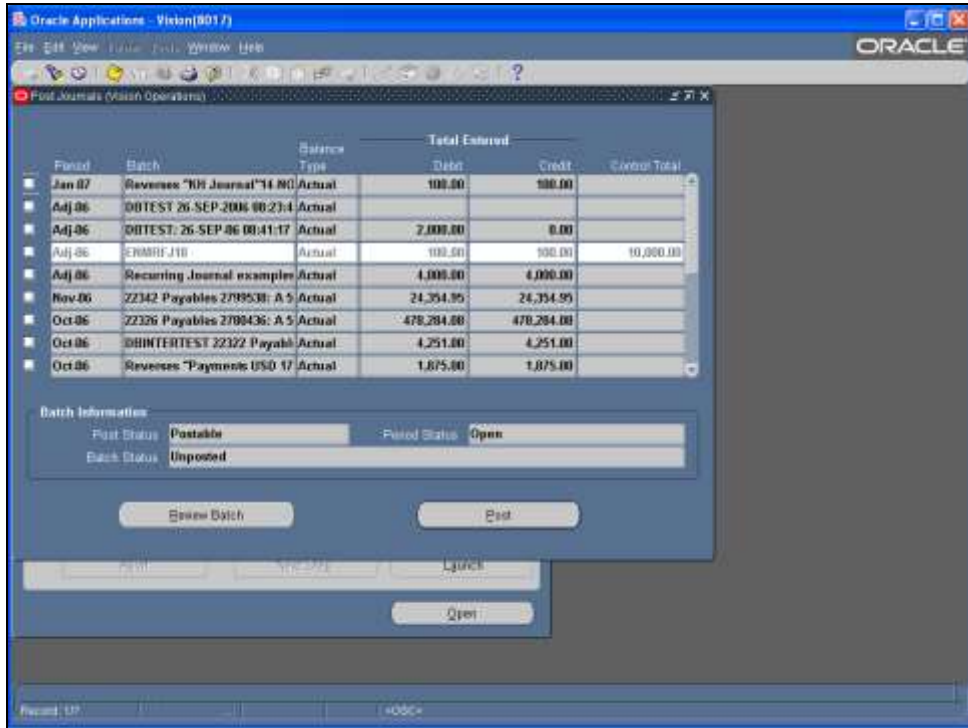
Step	Action
13.	The form associated with the step that must be completed opens. If you cancel out of this form without completing it, Oracle displays a message to let you know that your step has not completed.




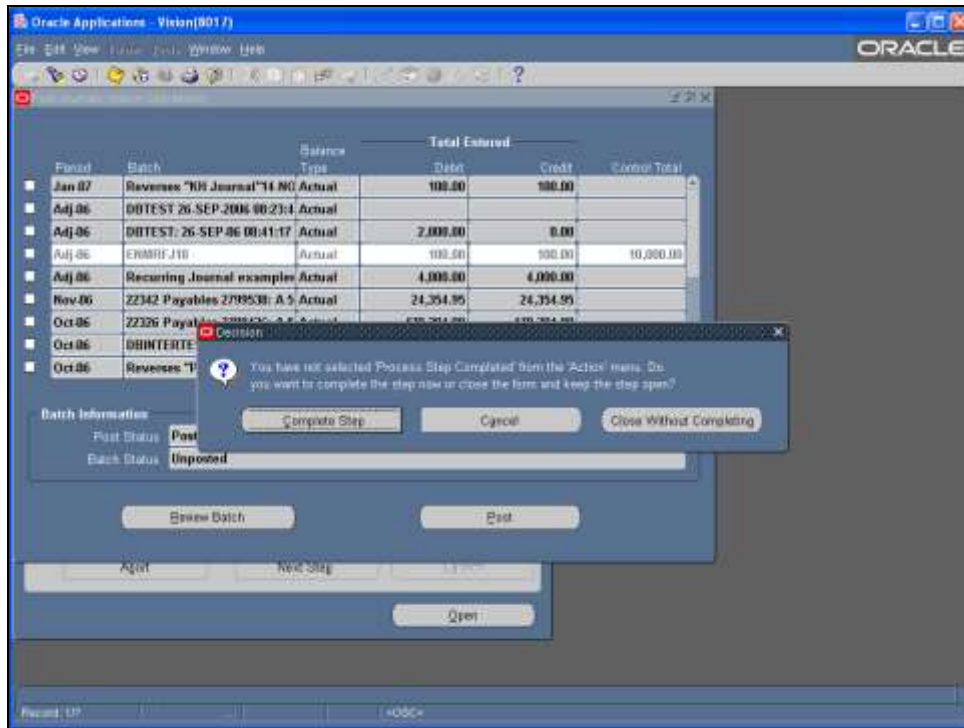
Step	Action
14.	<p>In this lesson a journal has been created for you named KH JOURNAL.</p> <p>Notice that in the toolbar, the NEXT STEP icon is available. Click on this icon to proceed to the next step in the process.</p> <p>Click on the NEXT STEP icon to proceed to the next step.</p> 



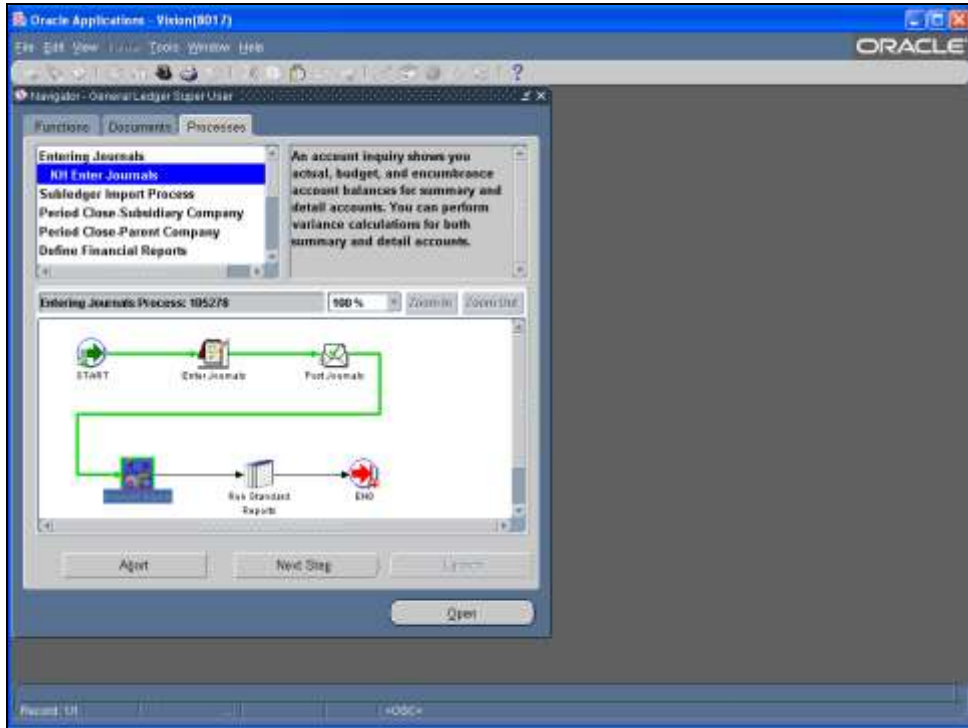
Step	Action
15.	The form associated with the next step in the process displays. Complete the appropriate actions on this form, as needed.



Step	Action
16.	<p>When you want to return to the Navigator, close your active forms.</p> <p>Click the Close Form icon.</p> 



Step	Action
17.	<p>A message displays prompting you to complete your step if the step is incomplete.</p> <p>Click on COMPLETE STEP.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">Complete Step</div>



Step	Action
18.	You have returned to the <i>Processes</i> tab. The process completed is highlighted in green. Proceed to the next step or abort the process by clicking on ABORT. Aborting the process removes your unique instance from the process list.
19.	In this lesson, you learned how to create a unique process and launch forms directly from the <i>Processes</i> tab. End of Procedure.

03 Navigator Functions

Procedure

Description:

The *Functions* tab in the *Navigator* window is where you access the various forms in each Oracle responsibility. You can also create a top ten list in the *Navigator*.

This lesson describes how to navigate in the *Functions* tab and shows you how to create a top ten list.

Oracle Prerequisites:

- You must have access to at least one Oracle responsibility.



A **function** is a stored procedure that defines business rules, performs automated tasks within an application, or retrieves application information. The stored procedure accepts standard arguments and returns a completion result.



The **Navigator** shows a list of links to responsibilities either in the Oracle Applications or the Self Service Applications.

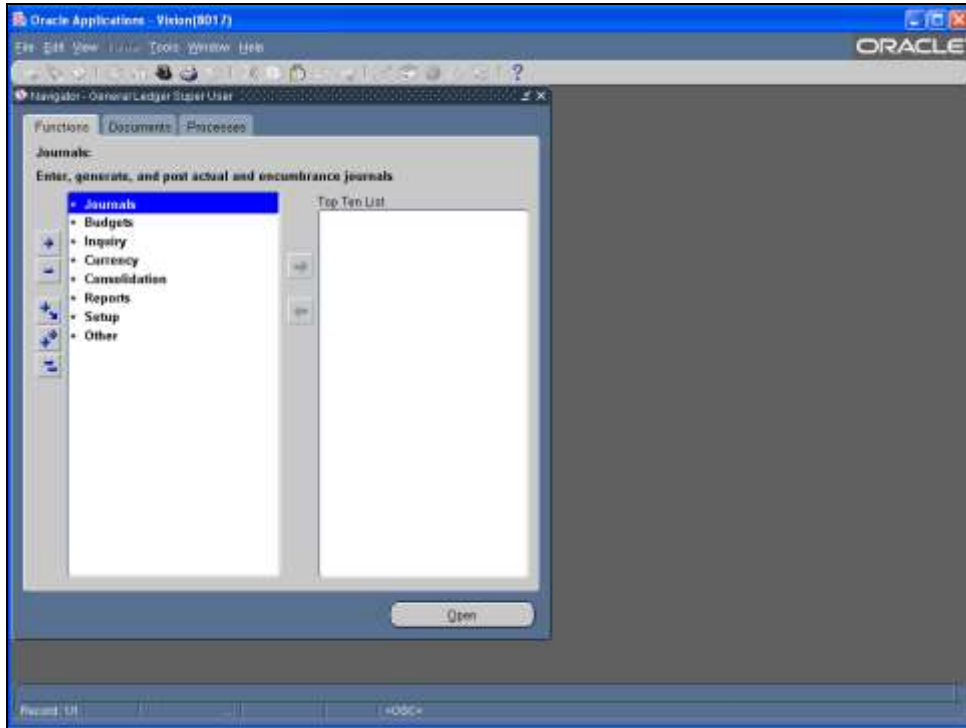



A **form** is a box around a set of related information on your screen. Many windows can appear on your screen simultaneously and can overlap or appear adjacent to each other. Windows can also appear embedded in other windows. You can move a window to a different location on your screen.





A **responsibility** is a level of authority set up by your system administrator in Oracle Applications. It lets you access a specific set of windows, menus, set of books, reports, and data in an Oracle application. Several users can share the same responsibility, and a single user can have multiple responsibilities.



Step	Action
1.	<p>This procedure can be performed in any Oracle responsibility. This lesson uses the GENERAL LEDGER SUPER USER Ledger responsibility.</p> <p>To complete this procedure, navigate to a desired form.</p>
2.	<p>This lesson uses the GENERAL LEDGER SUPER USER responsibility to detail <i>Navigator</i> functions. Each responsibility differs, however, all <i>Navigator</i> windows function the same.</p> <p>The left side of the window contains the menu items for the specific responsibility (also referred to as nodes). Items with a (+) before them indicate there are additional nodes in the menu path.</p>



Step	Action
3.	To navigate through the additional nodes of the menu path, expand an item by double-clicking on it. Double-click on JOURNALS . 

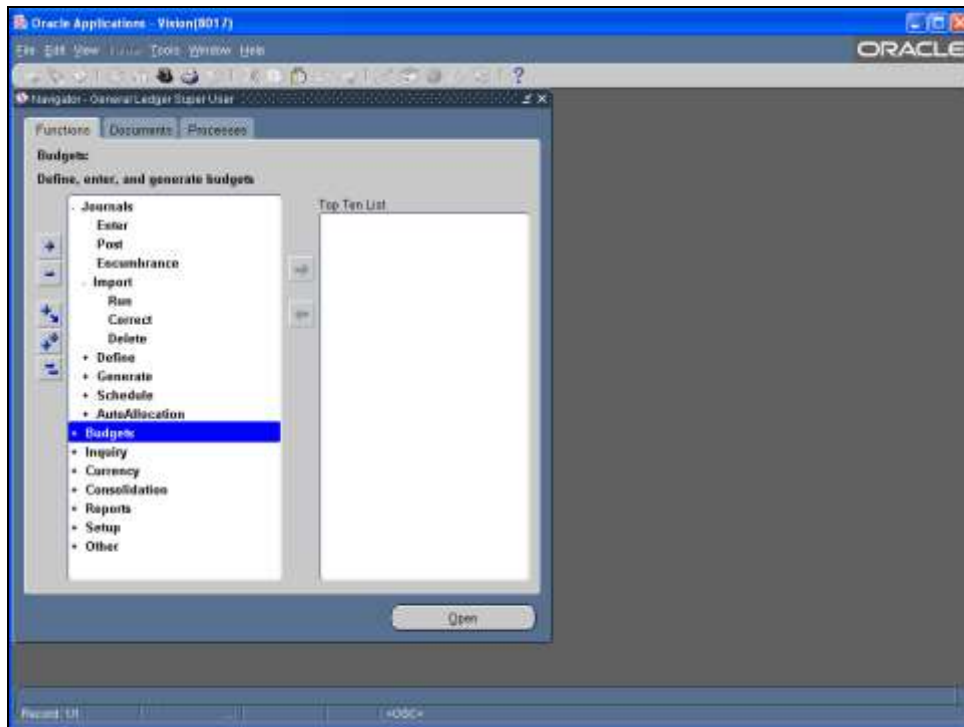
 Users may also click once on a node and click on the **OPEN** button.


Step	Action
4.	Nodes without a (+) or a (-) are the lowest level of the menu path. The lowest level of a menu path is a form. An item with a (-) is an expanded branch of the menu path. If the next node has a (+) in front of it, double-click on that node to move further through the menu path. Double-click on IMPORT . 

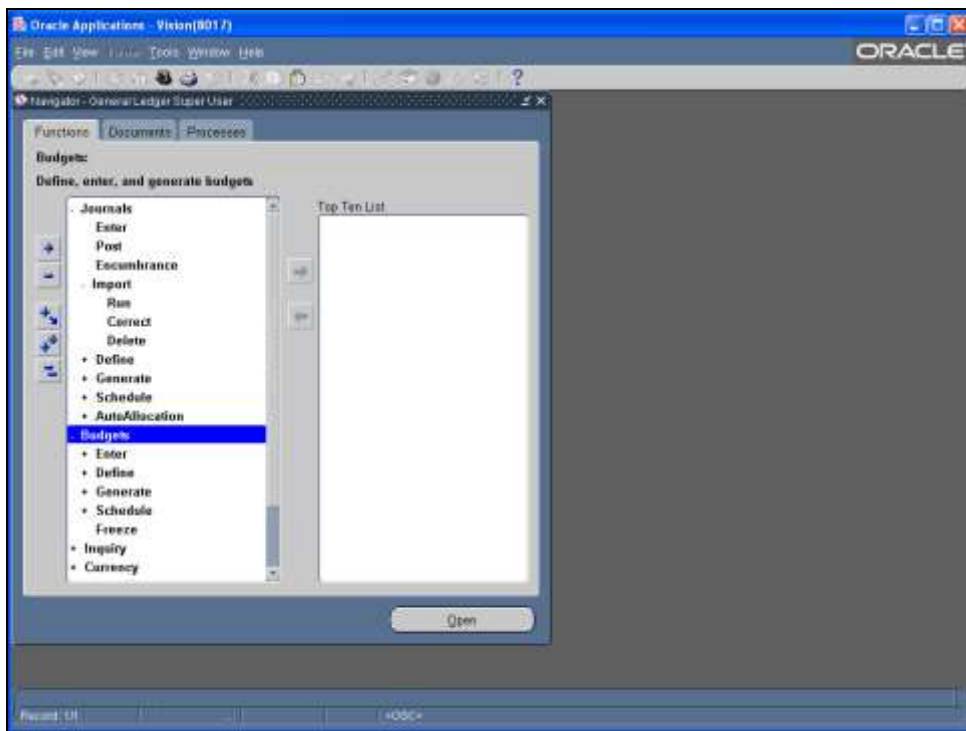
Step	Action
5.	<p>When you reach the lowest level of the menu path, there are multiple ways of opening the corresponding form. The methods are:</p> <ul style="list-style-type: none"> • Selecting the desired item by clicking once on it and then clicking on OPEN • Double-clicking on the desired item • Clicking once on the item and pressing the ENTER key on the keyboard. <p>Double-click the Run list item.</p> 
6.	<p>The first screen of the form displays. This lesson selected the Import Journals form. Your forms may vary.</p> <p>The CLOSE FORM icon closes all open windows and returns you to the <i>Navigator</i>. Close this form by clicking on the CLOSE FORM icon in the toolbar.</p> <p>Click on the CLOSE FORM icon in the toolbar.</p> 






Optional. Clicking on the X in the upper right corner of a window closes the window as well.



Step	Action
7.	<p>The buttons to the left of the menu path provide additional methods of expanding and collapsing branches of the menu.</p> <p>To expand one node, select the menu item and click once on the (+) button. In this tutorial the BUDGETS node is selected.</p> <p>Click once on the (+) button.</p> 





Step	Action
8.	<p>All items under the BUDGETS node expanded one level. Additional menu nodes within the BUDGETS node are not expanded.</p> <p>To collapse the items under one node, select an item with a (-) and click on the (-) button. In this tutorial, BUDGETS is already selected for you.</p> <p>Click on the (-) button.</p> 

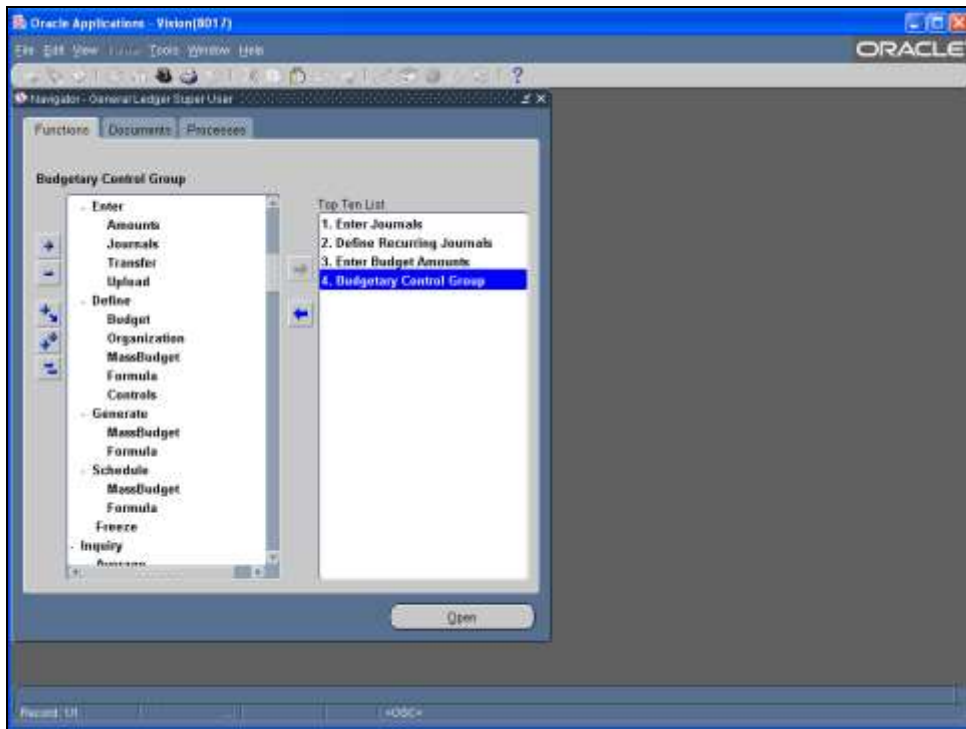
Step	Action
9.	<p>All the items under the BUDGETS node collapsed.</p> <p>To expand all nodes under one branch, select an item and click on the (+with arrow) button. The BUDGETS node is already selected.</p> <p>Click on the (+ with arrow) button.</p> 
10.	<p>All items under the BUDGETS node, including the sub-nodes of other items in that node, display.</p> <p>To expand all items in the entire menu, select the (++) button.</p> <p>Click on the (++) button.</p> 




You may need to scroll down through the menu path to view all nodes.

Step	Action
11.	<p>All of the nodes in the menu expanded.</p> <p>To collapse all items in the entire menu, select the (- -) button.</p> <p>Click on the (- -) button.</p> 
12.	<p>All of the nodes in the menu collapsed.</p> <p>The next section discusses placing and removing items from the Top Ten List. Your Top Ten List contains forms you access frequently. Placing items in your Top Ten List allows you to access a form without navigating through the menu path. You can have up to ten items in your Top Ten List. Modify your Top Ten List by adding and deleting items as often as you wish.</p>
13.	<p>To add an item to the Top Ten List, navigate through the menu path to a form you wish to select. The ENTER form under JOURNALS is already selected.</p> <p>Click on ADD TO LIST.</p> 
14.	<p>The form appears in the Top Ten List.</p>

Step	Action
15.	<p>Three additional items have been added to the Top Ten List for you.</p> <p>You can open a form from the Top Ten List in one of three ways:</p> <ul style="list-style-type: none"> • Double-click on the item in the Top Ten List • Click once on the item in the Top Ten List and click on OPEN • Type the number in front of the item on your keyboard



Step	Action
16.	<p>To remove an item from the Top Ten List, select that item from the list and click on the REMOVE FROM LIST button. The BUDGETARY CONTROL GROUP form is already selected.</p> <p>Click on REMOVE FROM LIST.</p> 
17.	<p>In this lesson, you learned how to navigate in the <i>Functions</i> tab in Oracle General Ledger and how to create a top ten list.</p> <p>End of Procedure.</p>

04 Navigator Documents

Procedure

Description:

Specific **documents** you wish to access frequently may be placed on the Documents tab of the *Navigator*. Your document list is different for each **responsibility**.

Oracle Prerequisites:

- You must have created a document in an Oracle application.



A **document** is the physical base of a transaction, such as an invoice, a receipt, or a payment.

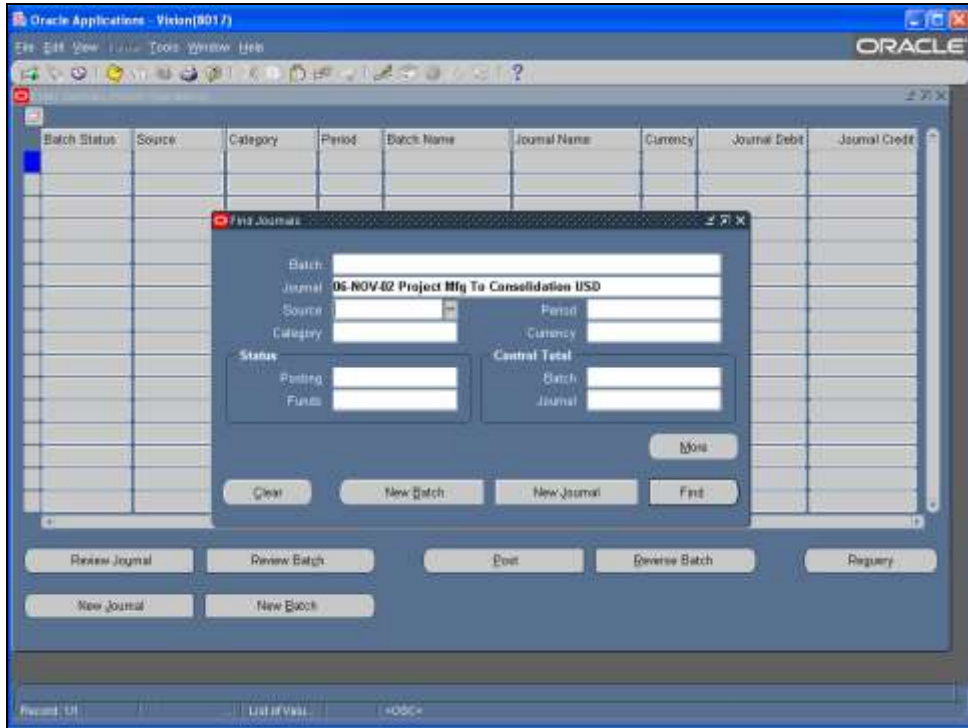




A **responsibility** is a level of authority set up by your system administrator in Oracle Applications. It lets you access a specific set of windows, menus, set of books, reports, and data in an Oracle application. Several users can share the same responsibility, and a single user can have multiple responsibilities.

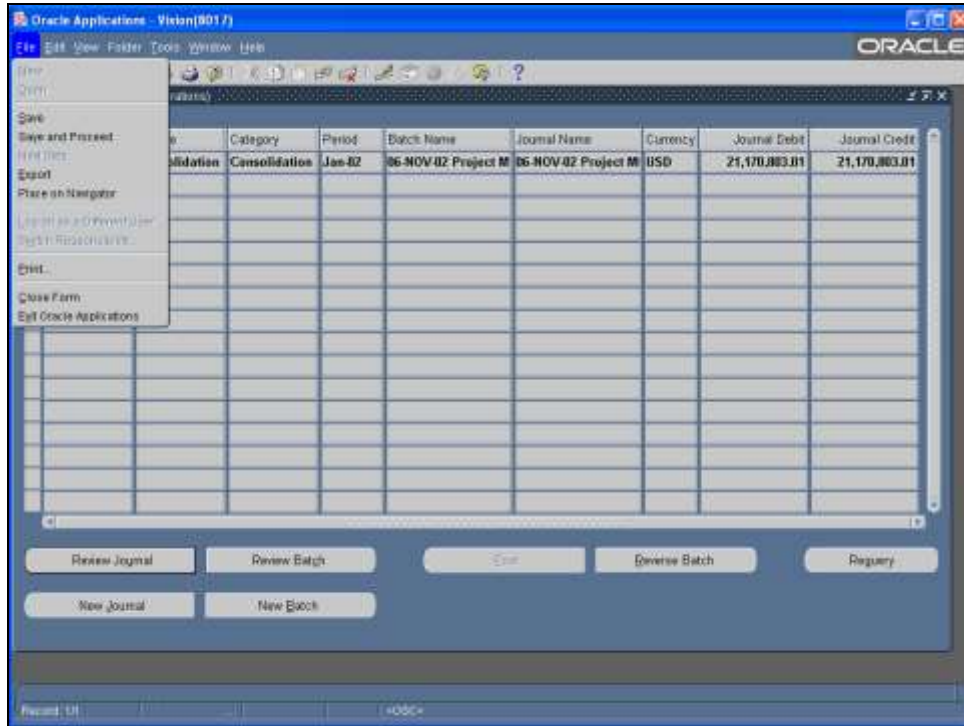
Step	Action
1.	<p>This procedure can be performed in some – but not all – Oracle responsibilities. This lesson uses the GENERAL LEDGER SUPER USER responsibility.</p> <p>To complete this procedure, navigate to a desired form.</p>




A **form** is a box around a set of related information on your screen. Many windows can appear on your screen simultaneously and can overlap or appear adjacent to each other. Windows can also appear embedded in other windows. You can move a window to a different location on your screen.




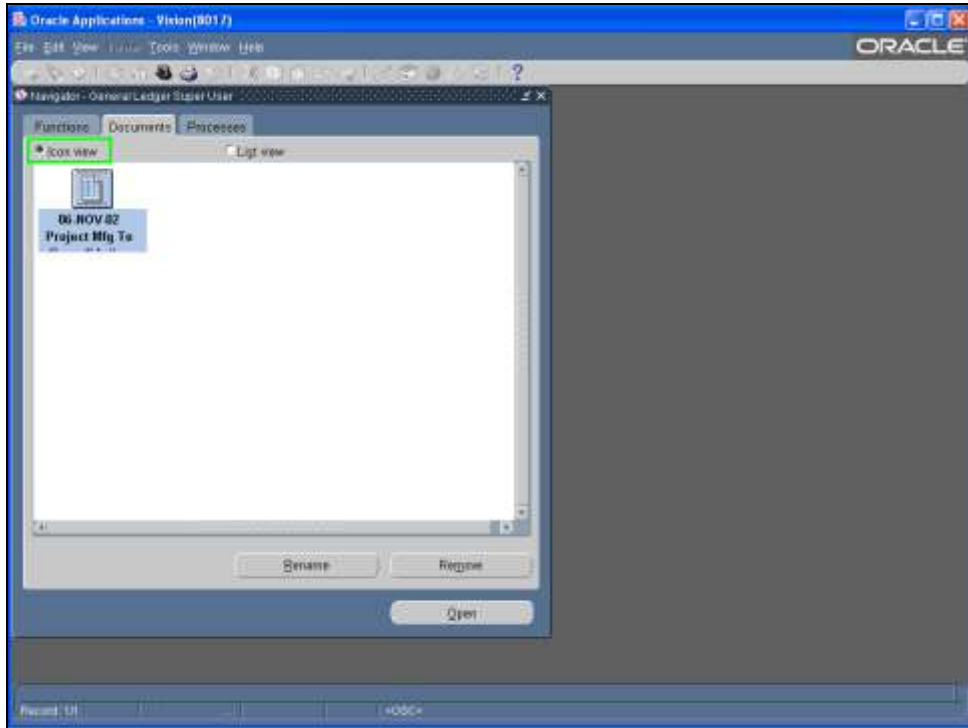
Step	Action
2.	<p>To add a frequently accessed document, first locate the document. Enter your search criteria to locate your document. This lesson searches for documents using the 06-NOV-02 Project Mfg To Consolidation USD journal in the <i>Find Journals</i> window.</p> <p>Click on FIND.</p> 
3.	<p>The documents display. Follow the menu path FILE > PLACE ON NAVIGATOR.</p> <p>Click on FILE.</p> 

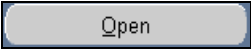


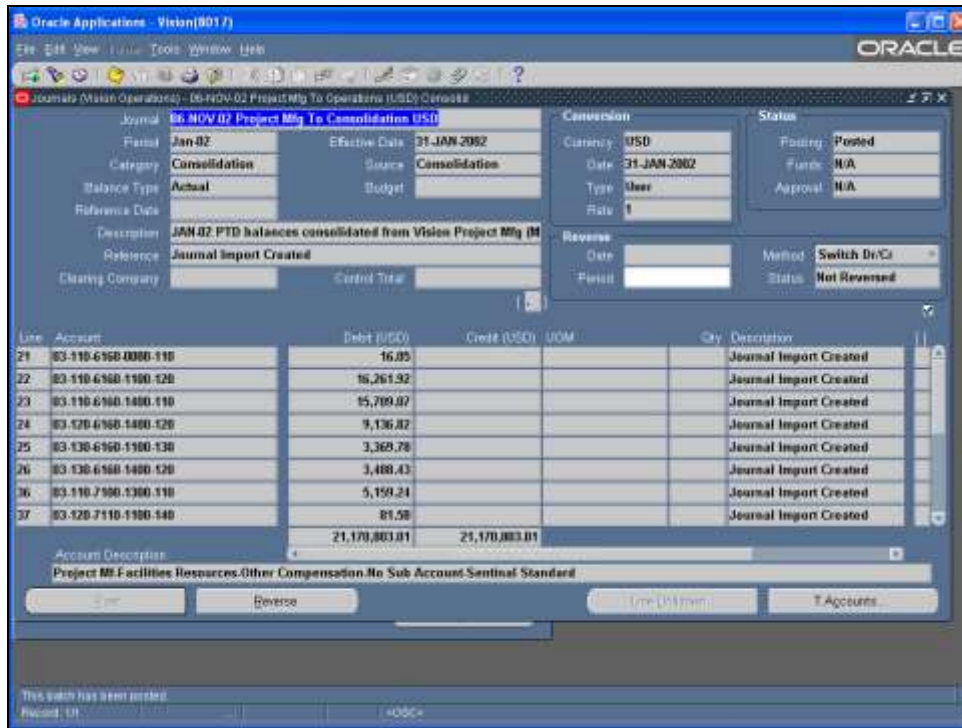
Step	Action
4.	Click on PLACE ON NAVIGATOR . 

 **If the Documents tab is not enabled in your responsibility, this option will not be available in the FILE menu.**

Step	Action
5.	Close this window to return to the <i>Documents</i> tab in the <i>Navigator</i> . Click the X Close Form button. 



Step	Action
6.	The document appears on the <i>Navigator Documents</i> tab. The <i>Documents</i> tab displays automatically when you have added documents to it. The default view is ICON VIEW.
7.	Select the LIST VIEW radio button to view your documents in list form. Click on RENAME to rename your document to something meaningful to you.
8.	Select REMOVE to remove your document from the <i>Navigator</i> . This does not remove the document from the database.
9.	To open documents from the <i>Documents</i> tab, double-click on the document icon or click once on it and click on OPEN. Click on OPEN . 



Step	Action
10.	In this lesson, you learned how to add frequently accessed documents to the Navigator. End of Procedure.

05 Log Off of Oracle 11i

Procedure


Description:

Use this procedure to log out of Oracle 11i when you have finished using the application.

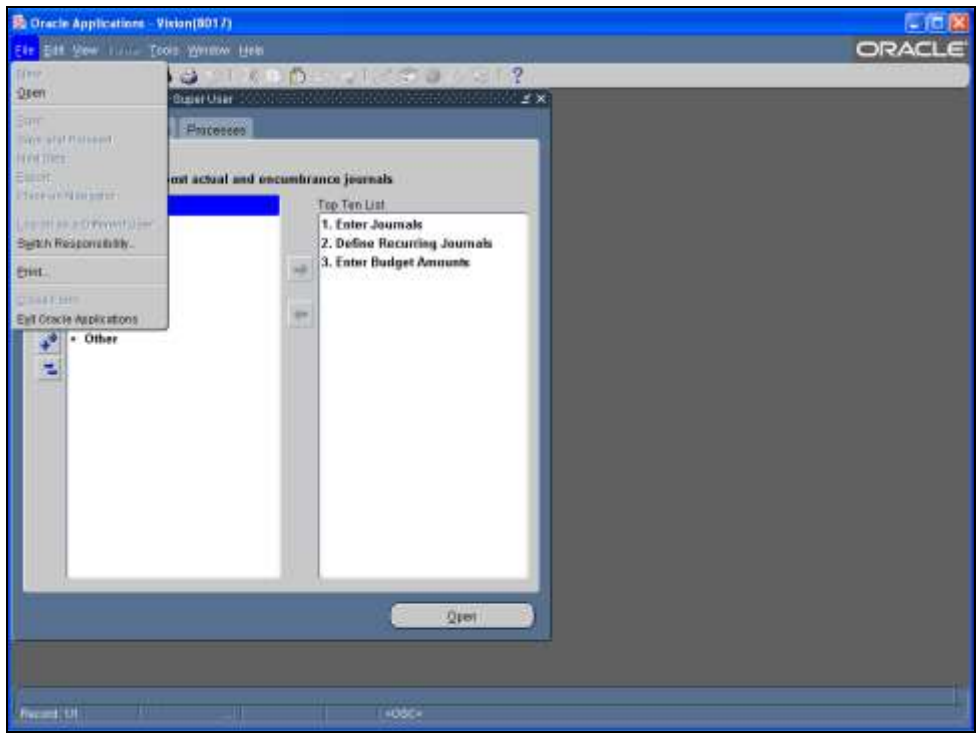
Oracle Prerequisites:

- There are no prerequisites to this procedure.

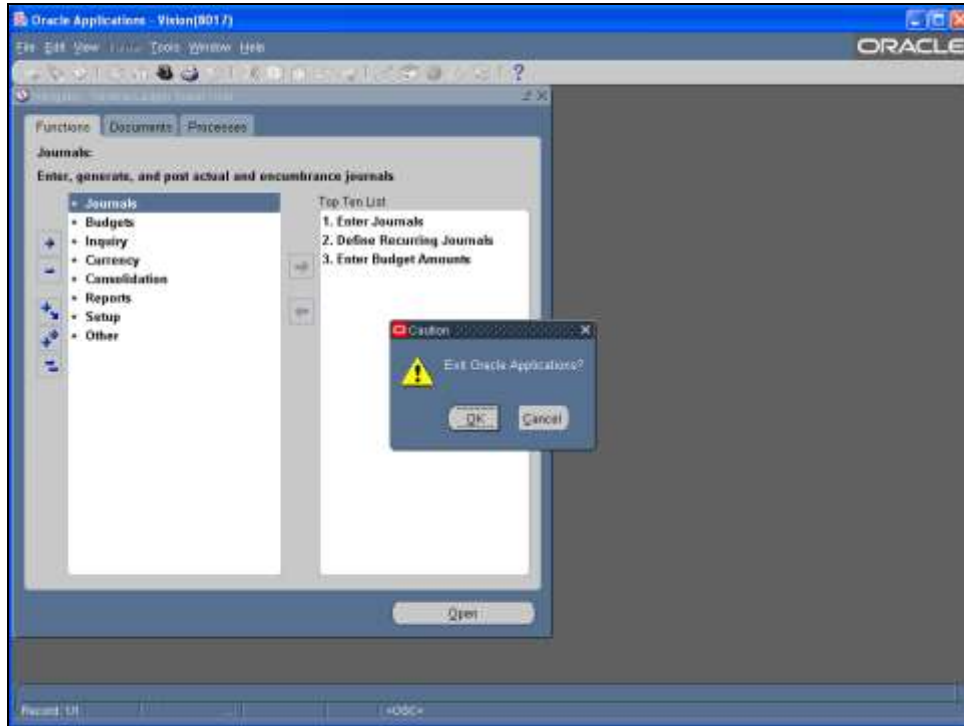
Step	Action
1.	This procedure can be performed in any Oracle responsibility. This lesson uses the Oracle GENERAL LEDGER SUPER USER responsibility. This procedure begins at the <i>Navigator</i> .


 A **responsibility** is a level of authority set up by your system administrator in Oracle Applications. It lets you access a specific set of windows, menus, set of books, reports, and data in an Oracle application. Several users can share the same responsibility, and a single user can have multiple responsibilities.

Step	Action
2.	You can log out of Oracle from any responsibility. This lesson exits Oracle applications from the GENERAL LEDGER SUPER USER <i>Navigator</i> window.



Step	Action
3.	You can log out of Oracle in multiple ways. You can (1) follow the menu path FILE > EXIT ORACLE APPLICATIONS, (2) close your Navigator window, or (3) close your browser window. Click on EXIT ORACLE APPLICATIONS .



Step	Action
4.	<p>A system message appears to confirm your decision to exit Oracle Applications.</p> <p>Select either OK to exit or CANCEL to return to your <i>Navigator</i> window.</p> <p>Click on OK.</p> 
5.	You are returned to your <i>Home Page</i> .
6.	In this lesson, you learned how to exit Oracle Applications. End of Procedure.

06 Log into the Oracle 11i System

Procedure

Description:


Because Oracle Applications contains business information that is of great importance to an organization, not just anyone can gain access to the system. Each user requires a unique username and a password, typically provided by your information technology department, to gain access to the system.

This lesson explains how to log into the Oracle 11i system and use the *Home Page* to select a responsibility to enter an Oracle Application.

Oracle Prerequisites:


- The Oracle 11i software system must have been installed on your computer.
- You must have access to the system by such means as a shortcut icon on your desktop, an option in your FAVORITES menu in your browser, or your START menu.
- A user account must have been created for you by a system administrator.

Step	Action
1.	It is not necessary to select a responsibility to perform this procedure.



A **responsibility** is a level of authority set up by your system administrator in Oracle Applications. It lets you access a specific set of windows, menus, set of books, reports, and data in an Oracle application. Several users can share the same responsibility, and a single user can have multiple responsibilities.

Step	Action
2.	There are multiple ways to access the Oracle 11i system. The most convenient method for accessing the system depends on the organization. Commonly, users are set up to access the system either through the FAVORITES menu in an Internet browser or a shortcut set up on the desktops of their computers. Open the Oracle 11i system using the method specified by your information technology department.
3.	To ensure that only authorized users have access to Oracle 11i system, each time you log in, you are required to enter your unique username and password. Enter your username in the USERNAME field. In this lesson a sample username is provided. Type KURTHALL in the USERNAME field.



A **field** is a position on a window used to enter, view, update, or delete information. A field prompt describes each field by telling what kind of information appears in the field, or alternatively, what kind of information can be entered in the field.

Step	Action
4.	<p>The most efficient way to move the cursor from one field to the next is to use the [TAB] key on your keyboard.</p> <p>In this lesson pressing the [TAB] key is not a requested task to move on to the next step.</p>
5.	<p>In the PASSWORD field, enter the password assigned to you by your information technology department. A sample password is provided.</p> <p>Type password in the PASSWORD field.</p>



To ensure that passwords stay private, as the password is typed in this field, each character appears as an asterisk (*) or a dot.

Step	Action
6.	<p>Clicking on the LOGIN button logs you into the Oracle 11i system.</p> <p>Click on LOGIN.</p> <p><input type="button" value="Login"/></p>



You choose a **button** to initiate a predefined action. Buttons do not store values. A button is usually labeled with text to describe its action or it can be an icon whose image illustrates its action.

Step	Action
7.	<p>This is the <i>Home Page</i> for Oracle Applications. It is designed so that your responsibilities are listed in the left portion of the <i>Navigator</i> region.</p>



The *Navigator* shows a list of links to responsibilities either in the Oracle Applications or the Self Service Applications.




A **region** is a collection of logically-related fields set apart from other fields by lines creating a block. Regions help to organize a block so that it is easier to understand.



Two Types of Interfaces:
Oracle 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. This lesson shows the HTML- based application.

If you have only one responsibility, the *Navigator* window of that responsibility appears in either the Forms-based or the HTML- based applications. The *Navigator* window allows you to open the forms you need.


Step	Action
8.	Select a responsibility to open an Oracle Application. For this lesson, use the GENERAL LEDGER SUPER USER responsibility. Click on the GENERAL LEDGER SUPER USER link. 
9.	In the right portion of this region, the functions (or transactions) associated with the responsibility you select display. This list is what you will use to carry out computer-related work tasks.



A **region** is a collection of logically-related fields set apart from other fields by lines creating a block. Regions help to organize a block so that it is easier to understand.



Transactions are invoices, debit memos, credit memos, deposits, guarantees and chargebacks entered with a GENERAL LEDGER (GL) date that is between the beginning and ending GL dates.


Step	Action
10.	Select an appropriate function (or transaction). This lesson accesses the ENTER form under JOURNALS. Click on the ENTER link under the JOURNALS heading. 




A **form** is a box around a set of related information on your screen. Many windows can appear on your screen simultaneously and can overlap or appear adjacent to each other. Windows can also appear embedded in other windows. You can move a window to a different

location on your screen.

Step	Action
11.	<p>The appropriate Oracle Applications window opens according to the function (or transaction) you selected.</p> <p>Closing this window takes you to the <i>Navigator</i> inside this application.</p> <p>Click on the CLOSE FORM icon located on the toolbar.</p>



Optional. Clicking on the X in the upper right corner of a window closes the window as well.



A **window is a box around a set of related information on your screen. Many windows can appear on your screen simultaneously and can overlap or appear adjacent to each other. Windows can also appear embedded in other windows. You can move a window to a different location on your screen.**

Step	Action
12.	<p>The <i>Navigator</i> window displays. This window contains the same function (or transaction) options that were displayed in the right portion of the <i>Navigator</i> region on the <i>Home Page</i>.</p> <p>The use of <i>Navigator</i> is described in a separate lesson.</p>
13.	<p>In this lesson, you learned how to log into the Oracle 11i system and to use the <i>Home Page</i> to select a responsibility to enter an Oracle Application. End of Procedure.</p>

07 Log into the Oracle 11i System for the First Time

Procedure

Description:

Because Oracle Applications contains business information that is of great importance to an organization, not just anyone can gain access to the system. Each user requires a unique

username and a password, typically provided by your information technology department, to gain access to the system.

This lesson explains how to log into the Oracle 11i system for the first time and use the Home Page to select a responsibility to enter an Oracle Application. When logging into the system for the first time, Oracle requires each new user to change the specified password to ensure that all passwords remain confidential. After the initial login process takes place, use the new password to log into the system. It is not required to change this password unless otherwise instructed by your information technology department.

Oracle Prerequisites:

- The Oracle 11i software system must have been installed on your computer.
- You must have access to the system by such means as a shortcut icon on your desktop, an option in your FAVORITES menu in your browser, or your START menu.
- A user account must have been created for you by a system administrator.

Step	Action
1.	It is not necessary to select a responsibility to perform this procedure.



A **responsibility** is a level of authority set up by your system administrator in Oracle Applications. It lets you access a specific set of windows, menus, set of books, reports, and data in an Oracle application. Several users can share the same responsibility, and a single user can have multiple responsibilities.

Step	Action
2.	There are multiple ways to access the Oracle 11i system. The most convenient method for accessing the system depends on the organization. Commonly, users are set up to access the system either through the FAVORITES menu in an Internet browser or a shortcut set up on the desktops of their computers. Open the Oracle 11i system using the method specified by your information technology department.
3.	To ensure that only authorized users have access to Oracle 11i system, each time you log in, you are required to enter your unique username and password. Enter your username in the USERNAME field. In this lesson a sample username is provided. Type KURTHALL in the USERNAME field.




A **field** is a position on a window used to enter, view, update, or delete information. A field prompt describes each field by telling what kind of information appears in the field, or alternatively, what kind of information can be entered in the field.



Step	Action
4.	<p>The most efficient way to move the cursor from one field to the next is to use the [TAB] key on your keyboard.</p> <p>In this lesson pressing the [TAB] key is not a requested task to move on to the next step.</p>
5.	<p>In the PASSWORD field, enter the password assigned to you by your information technology department. A sample password is provided.</p> <p>Type welcome in the PASSWORD field.</p>




To ensure that passwords stay private, as the password is typed in this field, each character appears as an asterisk (*) or a dot.

Step	Action
6.	<p>Clicking on the LOGIN button logs you into the Oracle 11i system.</p> <p>Click on LOGIN.</p> 





You choose a button to initiate a predefined action. Buttons do not store values. A button is usually labeled with text to describe its action or it can be an icon whose image illustrates its action.

Step	Action
7.	<p>Oracle prompts each new user to change the initial password. Enter the password that was given to you in the CURRENT PASSWORD field.</p> <p>Type welcome in the CURRENT PASSWORD field.</p>
8.	<p>Enter a new password in the NEW PASSWORD field.</p> <p>Type password1 in the NEW PASSWORD field.</p>
9.	<p>Re-enter the new password in the RE-ENTER NEW PASSWORD field to ensure that you entered it correctly.</p> <p>Type password1 in the RE-ENTER NEW PASSWORD field.</p>


Step	Action
10.	<p>Clicking on the APPLY button changes the password associated with this username.</p> <p>Click on APPLY.</p> 
11.	<p>This is the <i>Home Page</i> for the Oracle 11i system. It is designed so that your responsibilities are listed in the left portion of the <i>Navigator</i> region.</p>

 The *Navigator* shows a list of links to responsibilities either in the Oracle Applications or the Self Service Applications.

 A **region** is a collection of logically-related fields set apart from other fields by lines creating a block. Regions help to organize a block so that it is easier to understand.


 **Two Types of Interfaces:**
Oracle 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. This lesson shows the HTML- based application.


If you have only one responsibility, the *Navigator* window of that responsibility appears in either the Forms-based or the HTML- based applications. The *Navigator* window allows you to open the forms you need.


Step	Action
12.	<p>Select a responsibility to open an Oracle Application. For this lesson use the GENERAL LEDGER SUPER USER responsibility.</p> <p>Click on the GENERAL LEDGER SUPER USER link.</p> 
13.	<p>In the right portion of this region, the functions (or transactions) associated with the responsibility you selected display. This list is what you will use to carry out computer-related work tasks.</p>

 A **function** is a stored procedure that defines business rules, performs


automated tasks within an application, or retrieves application information. The stored procedure accepts standard arguments and returns a completion result.


 **Transactions** are invoices, debit memos, credit memos, deposits, guarantees and chargebacks entered with a GENERAL LEDGER (GL) date that is between the beginning and ending GL dates.

Step	Action
14.	Select a function (or transaction) from the ones available. This lesson accesses the ENTER form under JOURNALS. Click on the ENTER link under the JOURNALS heading. 

 A **form** is a box around a set of related information on your screen. Many windows can appear on your screen simultaneously and can overlap or appear adjacent to each other. Windows can also appear embedded in other windows. You can move a window to a different location on your screen.

Step	Action
15.	The appropriate Oracle Applications window opens according to the function (or transaction) you selected. Closing this window takes you to the <i>Navigator</i> inside this application. Click on the CLOSE FORM icon located on the toolbar.

 **Optional.** Clicking on the X in the upper right corner of a window closes the window as well.

 A **window** is a box around a set of related information on your screen. Many windows can appear on your screen simultaneously and can overlap or appear adjacent to each other. Windows can also appear embedded in other windows. You can move a window to a different location on your screen.



Step	Action
16.	The <i>Navigator</i> displays. This window contains the same function (or transaction) options displayed in the right portion of the <i>Navigator</i> region on the <i>Home Page</i> . The use of <i>Navigator</i> is described in a separate lesson.
17.	In this lesson, you learned how to log into the Oracle 11i system for the first time and to use the <i>Home Page</i> to select a responsibility to enter an Oracle Application. End of Procedure.

08 Change Your Personal Profile Options

Procedure

Description:


Your system administrator sets default **profiles** for all users in your organization. Most profiles cannot be changed by users. However, some profiles can be changed by individual users and allow you to change some options specific to you. Some profiles you may wish to change include:

- **JAVA COLOR SCHEME:** Determines the color scheme of your Oracle interface
- **PRINTER:** Sets your default printer
- **CONCURRENT:REPORT COPIES:** Sets the default number of copies of documents to be printed
- **ICX: DATE FORMAT MASK:** Changes the default date format used in many forms. For example, the default is usually 31-DEC-1999. You can use this profile to change your date format to 12/31/1999. Other formats are also available.

Each of these profiles changes your view of Oracle only and does not affect any other users in your organization.

Oracle Prerequisites:

- There are no prerequisites to this procedure.



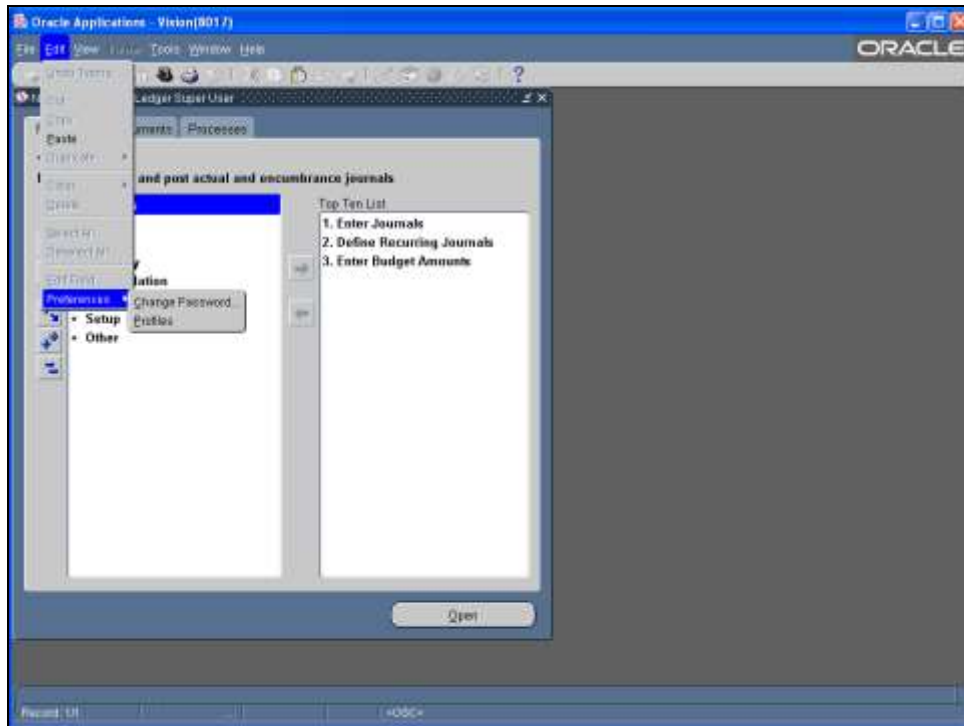
The **user profile** stores user preferences such as session language, date format, and number format. It is stored in the database, but users can configure it from a browser on the client tier.

Step	Action
1.	This procedure can be performed in any Oracle responsibility. This lesson uses the Oracle GENERAL LEDGER SUPER USER responsibility. This procedure begins at the <i>Navigator</i> .

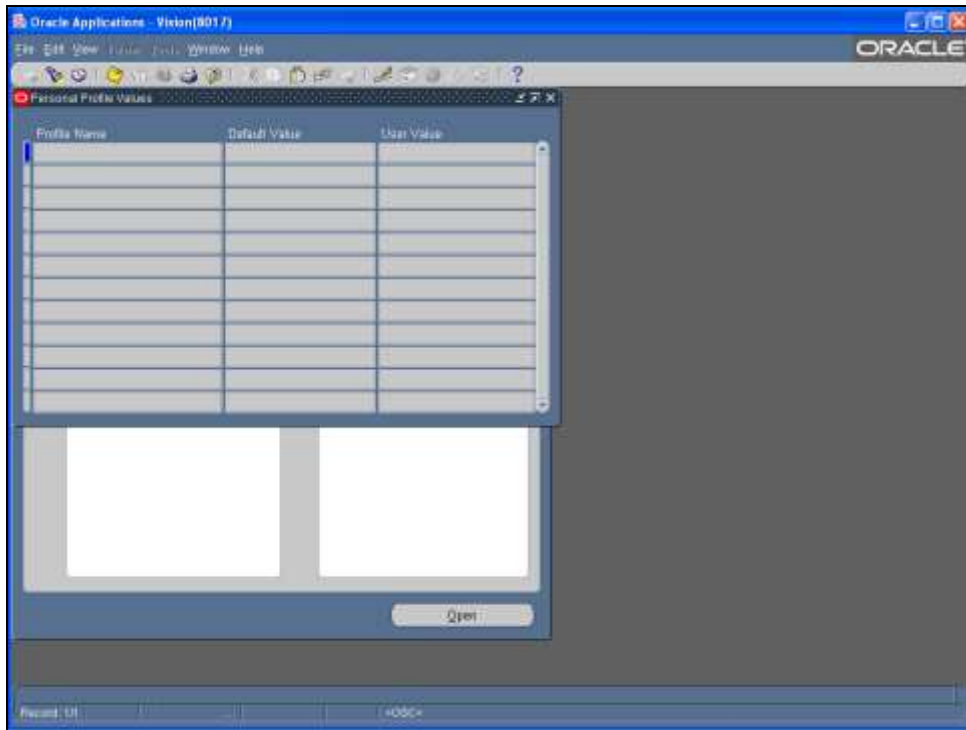


A responsibility is a level of authority set up by your system administrator in Oracle Applications. It lets you access a specific set of windows, menus, set of books, reports, and data in an Oracle application. Several users can share the same responsibility, and a single user can have multiple responsibilities.

Step	Action
2.	You can perform this procedure from any form. Note that if you have custom forms in your Oracle system, the PROFILES option may not be available. Contact your system administrator if the PROFILES option is not available for you.

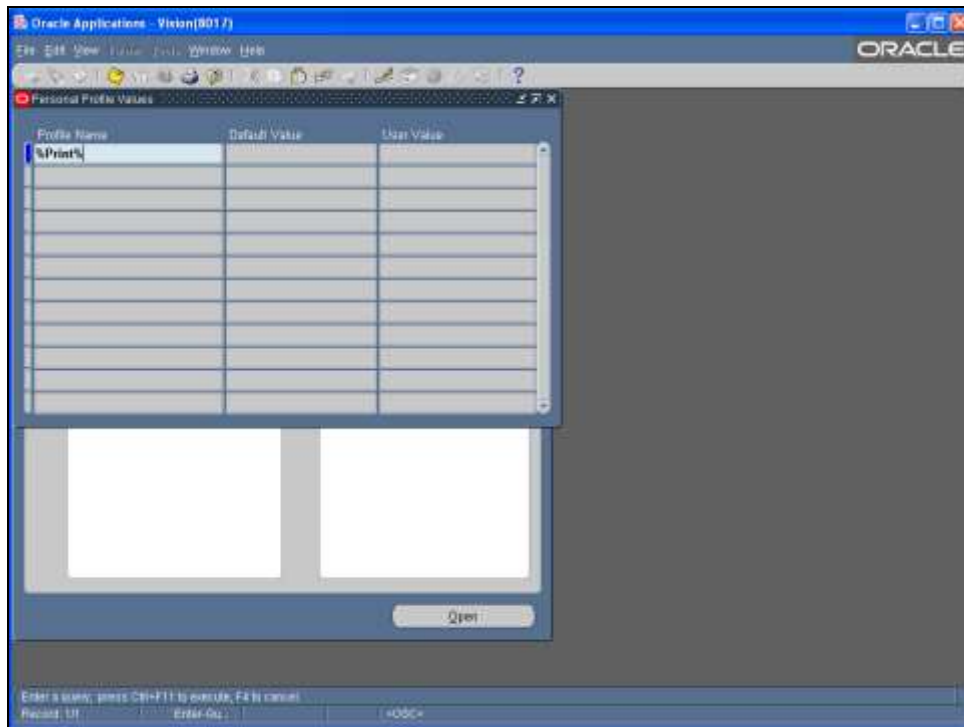


Step	Action
3.	Follow the menu path EDIT > PREFERENCES > PROFILES. Click on PROFILES . <input data-bbox="370 363 561 394" type="text" value="Profiles"/>

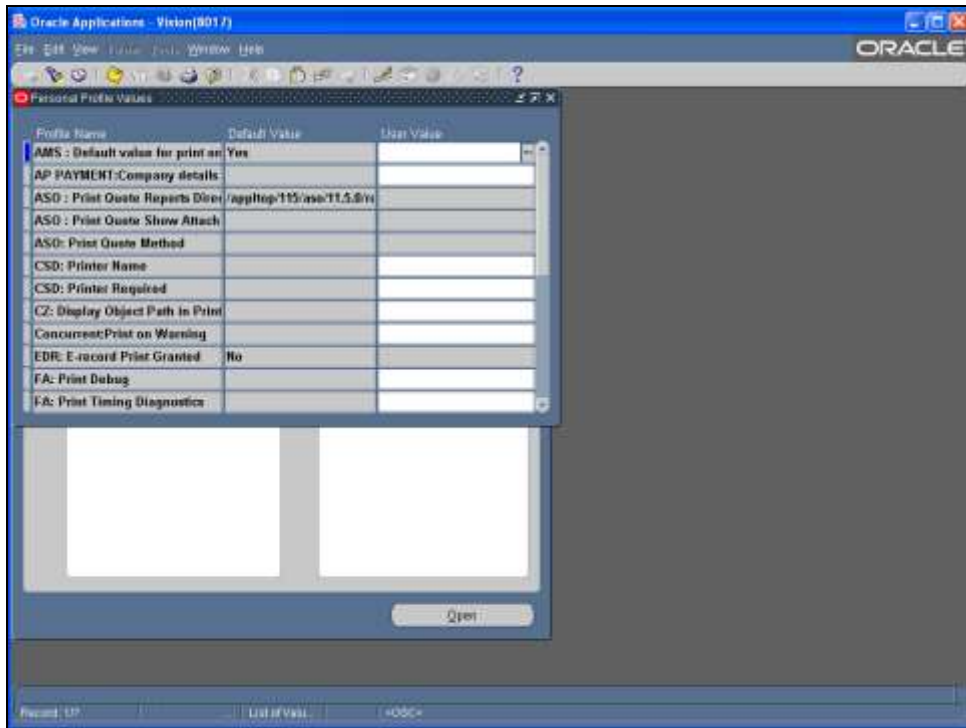



Step	Action
4.	The <i>Personal Profile Values</i> window opens. You can search using any of the blue fields in this window. Enter a Query by Example to locate the default printer profiles. Initiate the Query by Example by following the menu path: VIEW > QUERY BY EXAMPLE > ENTER or press the [F11] key on your keyboard. Press the [F11] key on your keyboard.

Step	Action
5.	<p>This lesson demonstrates changing the default printer. You can use this same process to change the other profile values noted at the beginning of this document.</p> <p>Enter the full or partial value of the profile name. If you enter a partial value, use the percent (%) wildcard on either side of the name to ensure the profile will be retrieved.</p> <p>Type %Print% in the PROFILE NAME field.</p>



Step	Action
6.	<p>Execute the Query by Example by following the menu path: VIEW > QUERY BY EXAMPLE > RUN or by pressing the [CTRL] + [F11] keys on your keyboard.</p> <p>Press the [CTRL] + [F11] keys on your keyboard to execute the query.</p>



Step	Action
7.	<p>Results that meet your search criterion display. Default information displays in the DEFAULT VALUE field.</p> <p>Select your new value from the field's List of Values. If your desired value is not available, contact your system administrator.</p>
8.	<p>Save the new settings by clicking on the SAVE icon on the toolbar.</p> <p>Click on SAVE icon.</p> 
9.	<p>In this lesson, you learned how to change some profile options specific to you without affecting any other users in your organization.</p> <p>End of Procedure.</p>

09 Change Your Password

Procedure

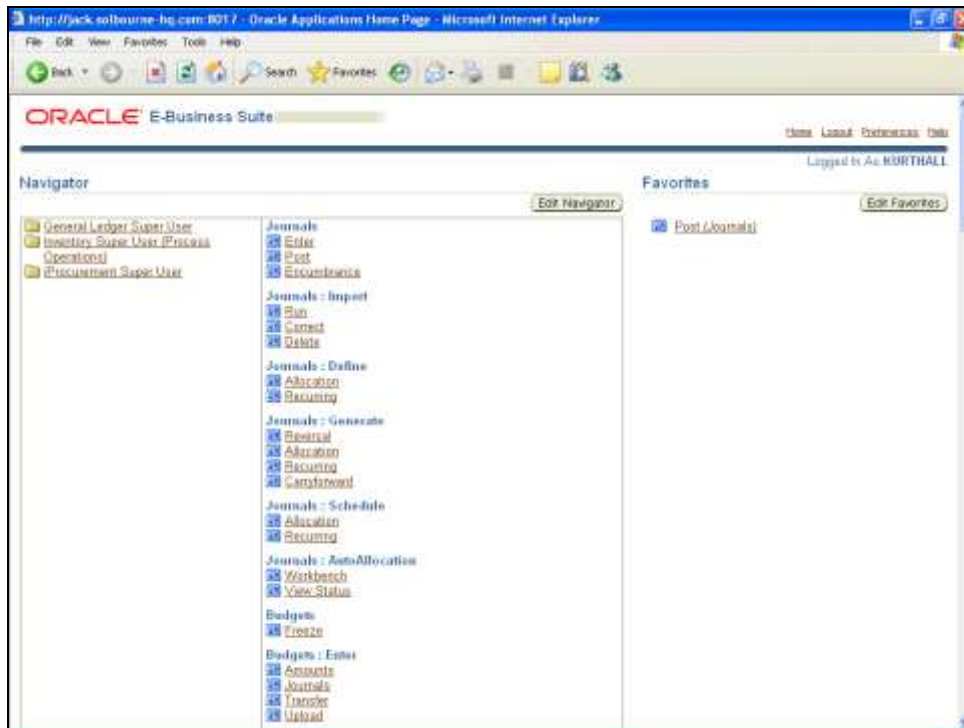
Description:

Periodically, you may wish to change your password for security reasons.

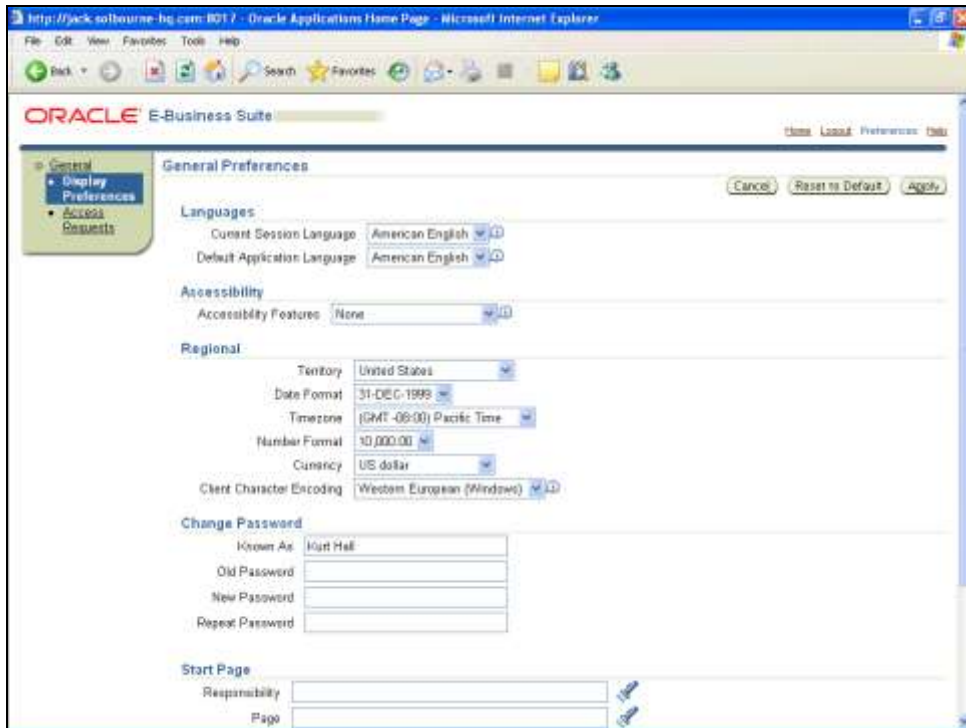
Oracle Prerequisites:

- You must have completed the initial login process to use this procedure to change your password.

Step	Action
1.	This procedure can be performed in any Oracle responsibility. It can also be performed on your home page. This lesson uses the Oracle GENERAL LEDGER SUPER USER responsibility.




Step	Action
2.	The first method of changing your password can be done through your home page. Log into Oracle and navigate to your home page. Note that your system may not be set up to access this screen. If so, you can change your password within the Oracle forms. This procedure discusses both changing your password on the home page and within the Oracle forms.
3.	Click on the PREFERENCES link.

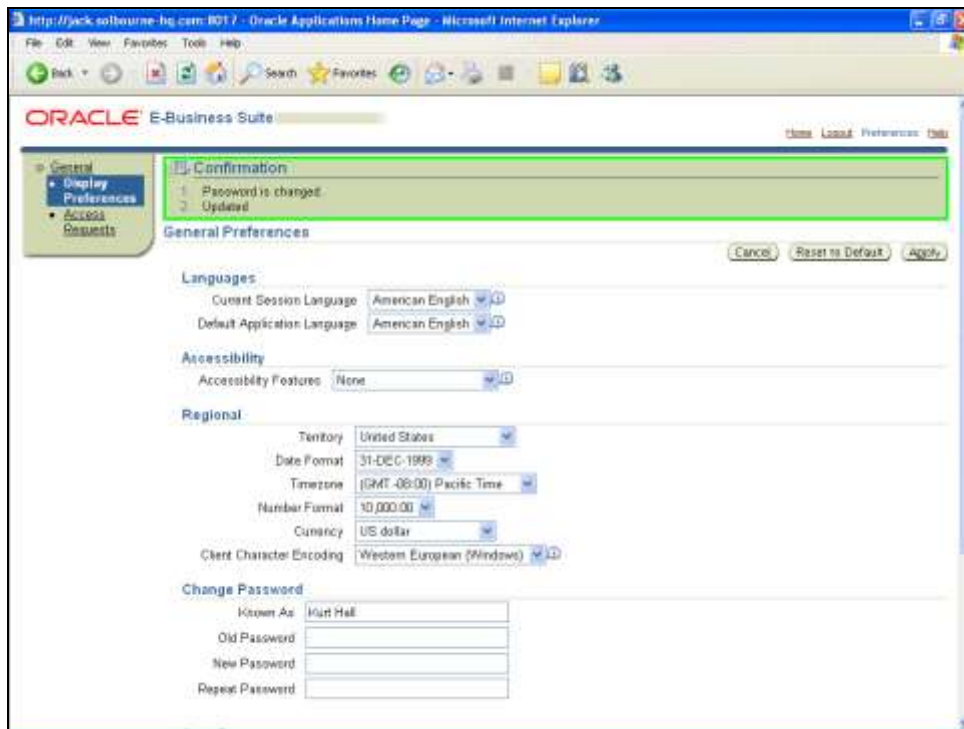


Step	Action
4.	Click in the OLD PASSWORD field to activate it. <input type="text"/>
5.	<p>The most efficient way to move the cursor from one field to the next is to use the [TAB] key on your keyboard.</p> <p>In this lesson pressing the [TAB] key is not a requested task to move on to the next step.</p> <p>Enter your current password in the OLD PASSWORD field.</p> <p>Type welcome in the OLD PASSWORD field.</p>

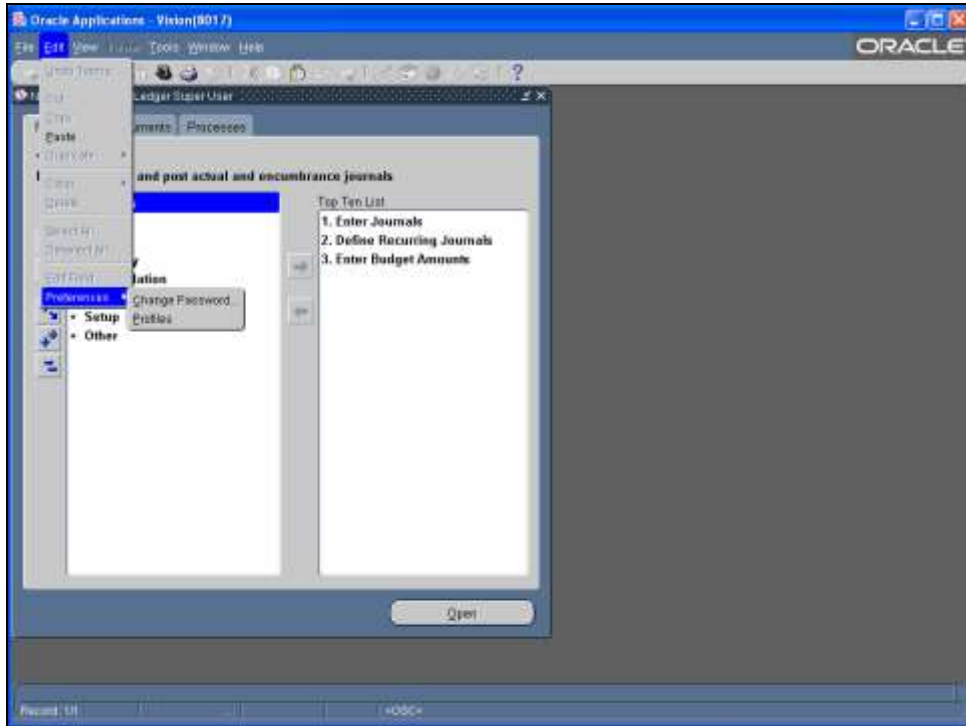
 **To ensure that passwords stay private, as the password is typed in this field, each character appears as an asterisk (*) or a dot.**

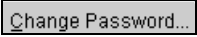
Step	Action
6.	<p>Enter a new password in the NEW PASSWORD field.</p> <p>Type password in the NEW PASSWORD field.</p>

Step	Action
7.	Re-enter your new password in the REPEAT PASSWORD field. Type password in the REPEAT PASSWORD field.
8.	Click on the APPLY button to accept the changes made to your password. Click on APPLY . 




Step	Action
9.	A confirmation message appears to inform you that your password has changed successfully.
10.	You can also change your password after you have entered Oracle Applications.



Step	Action
11.	Follow the menu path EDIT > PREFERENCES > CHANGE PASSWORD. Click on CHANGE PASSWORD . 
12.	Enter your current password in the OLD PASSWORD field. Type welcome in the OLD PASSWORD field.

 To ensure that passwords stay private, as the password is typed in this field, each character appears as an asterisk (*) or a dot.

Step	Action
13.	Enter a new password in the NEW PASSWORD field. Type password in the NEW PASSWORD field.
14.	Re-enter your new password in the RE-ENTER NEW PASSWORD field. Type password in the RE-ENTER NEW PASSWORD field.
15.	Click on OK . 

Step	Action
16.	In this lesson, you learned how to change your password. End of Procedure.

10 The Oracle 11i Main Menu (Personal Home Page Mode)

Procedure

Description:

When you log in to Oracle, your first screen is the Oracle 11i Main Menu. The Main Menu allows you to navigate to the responsibility you need to access. You may also use this page to set up your own personalized home page, which can contain links to notifications, forms, and web sites you access often. In this lesson you will learn how to set up and create your own personalized home page.

This Oracle 11i Main Menu is activated under the SELF SERVICE PERSONAL HOME PAGE profile option PERSONAL HOME PAGE. Your system may be set up with the SELF SERVICE PERSONAL HOME PAGE profile option FRAMEWORK ONLY. If the FRAMEWORK ONLY profile option has been set in your system, you will not see this Oracle 11i Main Menu demonstrated in this procedure after you log in. Instead, you will see a web-based Home Page. If so, disregard this procedure and refer to *The Oracle 11i Home Page (Framework Mode)* lesson.

Oracle Prerequisites:

- Users must have the *Preferences SSWA* responsibility to complete the tasks in this lesson. If you do not have access to this responsibility, contact your System Administrator.


Step	Action
1.	It is not necessary to select a responsibility to perform this procedure.

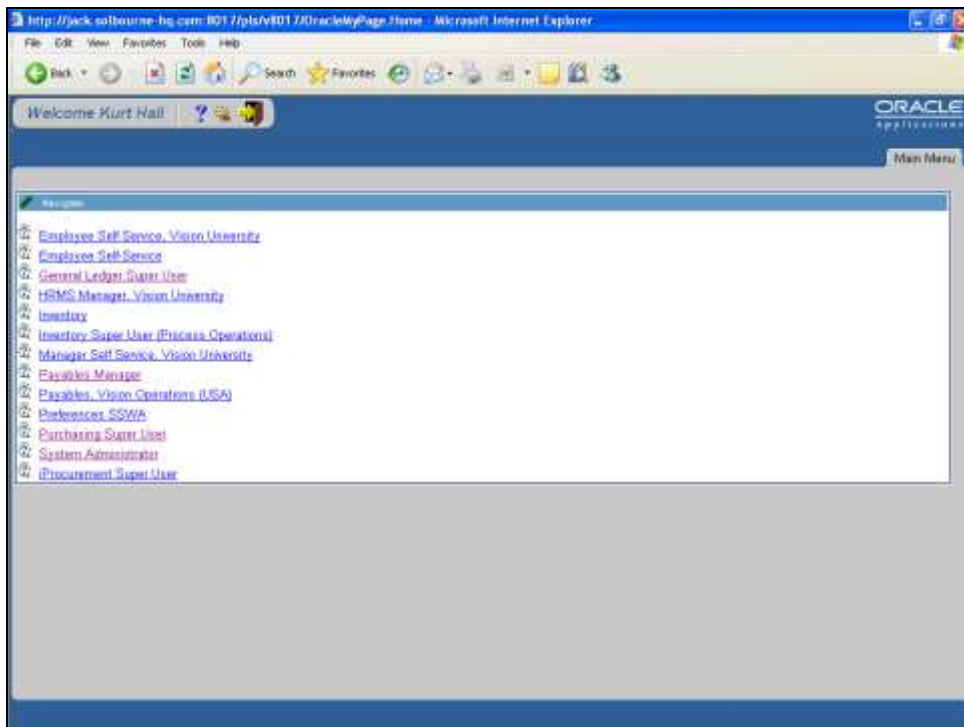




A **responsibility** is a level of authority set up by your system administrator in Oracle Applications. It lets you access a specific set of windows, menus, set of books, reports, and data in an Oracle application. Several users can share the same responsibility, and a single user can have multiple responsibilities.

Step	Action
2.	<p>The <i>Main Menu</i> tab displays all responsibilities assigned to you. If you do not have any responsibilities assigned, this screen may not open and you may proceed directly to the <i>Navigator</i> window.</p> <p>Clicking on a responsibility link opens that responsibility's <i>Navigator</i> window. This lesson does not demonstrate clicking on a responsibility link.</p>

 **The *Navigator* shows a list of links to responsibilities either in the Oracle Applications or the Self Service Applications.**

 **A *window* is a box around a set of related information on your screen. Many windows can appear on your screen simultaneously and can overlap or appear adjacent to each other. Windows can also appear embedded in other windows. You can move a window to a different location on your screen.**



Step	Action
3.	<p>To create a personal home page click on the CREATE AND MODIFY PAGES icon is located near the top left-hand side of the window.</p> <p>Click on the CREATE AND MODIFY PAGES icon.</p> 
4.	<p>The first time this form is accessed, there are no tabs listed in the PAGE NAME field.</p> <p>The NEW button creates a new tab next to the <i>Main Menu</i> tab on the opening screen. You can have multiple tabs that contain different information. The <i>Main Menu</i> tab cannot be deleted.</p> <p>Click on NEW.</p> 



A **form** is a box around a set of related information on your screen. Many windows can appear on your screen simultaneously and can overlap or appear adjacent to each other. Windows can also appear embedded in other windows. You can move a window to a different location on your screen.



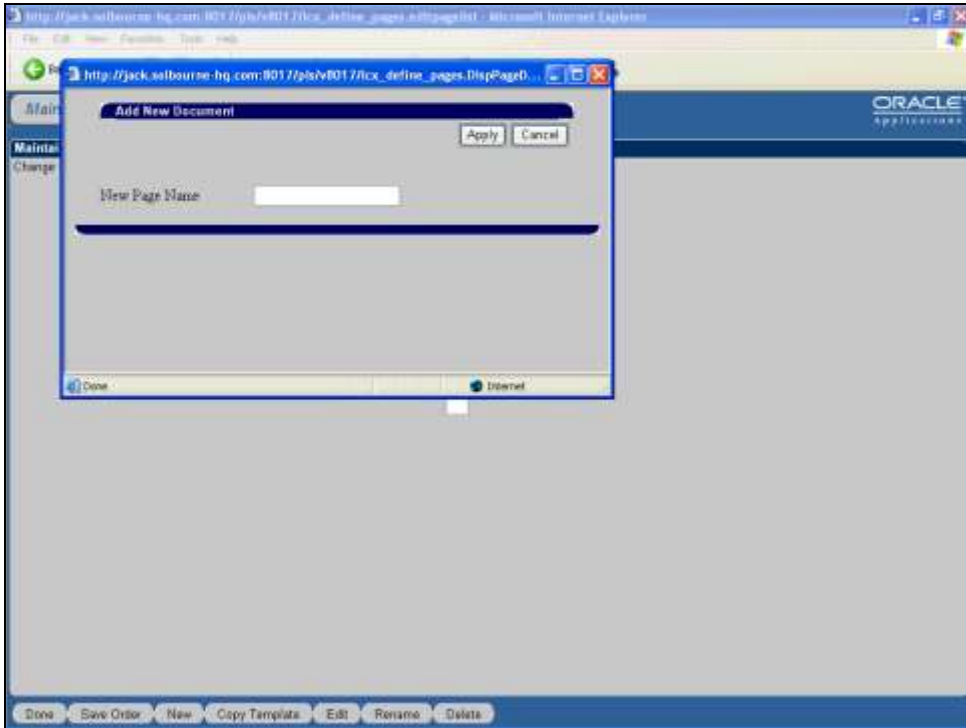
A **tab** is an area of a window with related group of fields (items) that appears when your click on a particular "tab" graphic element. The term "tab" is often used interchangeably with the term "tab page".




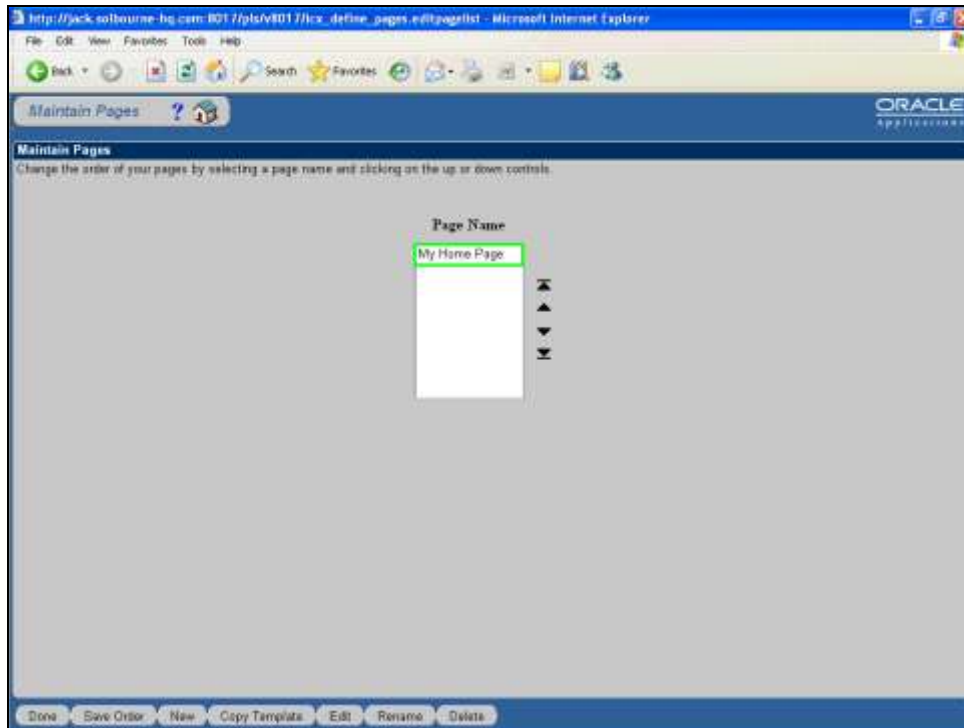
A **field** is a position on a window used to enter, view, update, or delete information. A field prompt describes each field by telling what kind of information appears in the field, or alternatively, what kind of information can be entered in the field.





You choose a **button** to initiate a predefined action. Buttons do not store values. A button is usually labeled with text to describe its action or it can be an icon whose image illustrates its action.




Step	Action
5.	<p>Enter a page name for the new tab in the NEW PAGE NAME field. Specify a name that makes sense to you in the future or when you are looking at the main responsibility page.</p> <p>Type My Home Page in the NEW PAGE NAME field.</p>
6.	<p>Select the APPLY button to name the new page.</p> <p>Click on APPLY.</p> 




Step	Action
7.	<p>The new page name appears in the PAGE NAME field. Within this field, you can move tabs around according to your preference by using the arrows on the right side of the field.</p> <p>Confirm the addition and return to the main page by selecting the DONE button.</p> <p>Click on DONE.</p> 

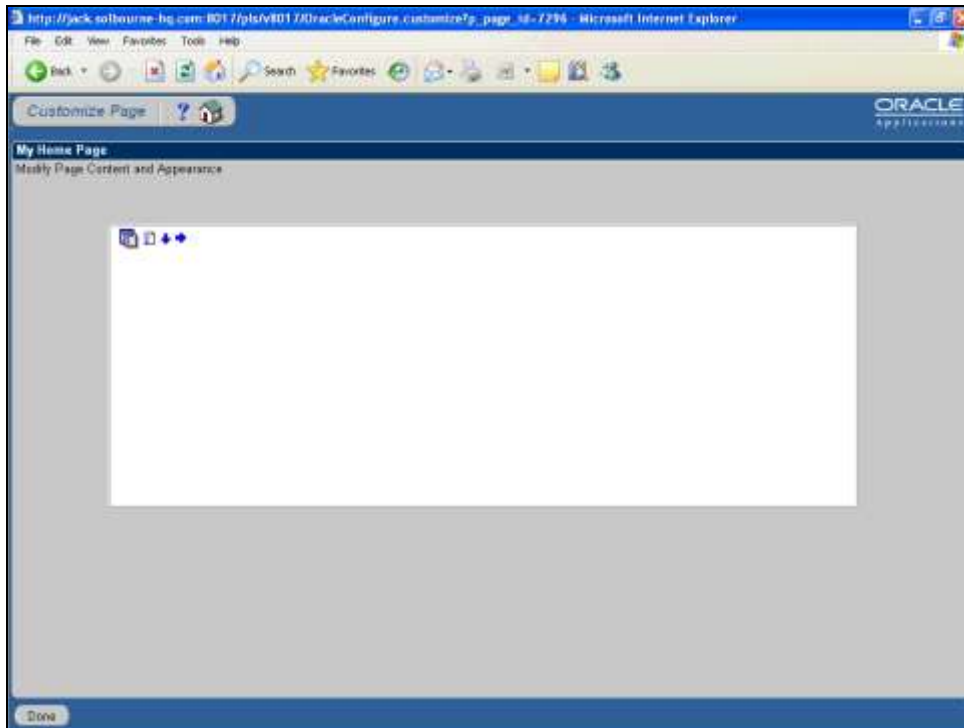
 **To rename your page, click on the page name and click on the RENAME button. To delete your page, click on the page name and click on the DELETE button. Edit pages by clicking on the page name and then clicking on the EDIT button. This example demonstrates viewing the created page before editing it.**



Step	Action
8.	<p>The new page displays, but no content displays. Use the EDIT (pencil) icon on the tab to edit the information appearing on the tab.</p> <p>Click on the EDIT icon in the new tab.</p> 


Step	Action
9.	Clicking on the EDIT APPEARANCE icon allows users to edit the appearance of the information on the page. Features include increasing or decreasing the width of the field being viewed and determining whether a border should surround the information.
10.	Use the ADD ROW icon to add a region as an additional row to the page.

 **A region is a collection of logically-related fields set apart from other fields by lines creating a block. Regions help to organize a block so that it is easier to understand.**




Step	Action
11.	Use the ADD COLUMN icon to add a region as an additional column to the page.




Step	Action
12.	Use the EDIT CONTENT icon to edit the content of the new page. Click on the EDIT CONTENT icon. 
13.	Select an item from the AVAILABLE PLUGS list to add to the page. Click FAVORITES in the AVAILABLE PLUGS field. <input type="text" value="Favorites"/>
14.	Click on the ADD arrow to move the item to the PLUGS IN CURRENT REGION field. Click on the ADD arrow. 



 **Click on the ADD ALL (>>) icon to add all items from the AVAILABLE PLUGS field. To remove an item in the PLUGS IN CURRENT REGION field, select the item and click on the REMOVE icon (<). To remove all of the items in the PLUGS IN CURRENT REGION field, select all of the items and click on the REMOVE ALL(<<) icon.**




Step	Action
15.	In this lesson the NAVIGATE plug was also added to the PLUGS IN CURRENT REGION field. Click on DONE when all plugs are added. <input type="button" value="Done"/>
16.	The plugs now display. Confirm the edits and return to the main page by selecting the DONE button. Click on DONE . <input type="button" value="Done"/>
17.	To modify how the information displays, some regions allow customizations. Select CUSTOMIZE in the appropriate region. This lesson customizes the FAVORITES region. Click on the CUSTOMIZE link in the FAVORITES region. <input type="button" value="Customize"/>

Step	Action
18.	<p>The fields in this window depend on the region you are customizing. For example, the options available when customizing your Favorites region will not be the same as the fields shown above for the Worklist region. The text at the top of the screen provides information on how to edit your customizable region.</p> <p>Select the responsibility whose action you want to add to your FAVORITES list. In this lesson the first responsibility is already selected.</p> <p>Click ALL ACTIONS AWAITING YOUR ATTENTION in the OPTION field to add to the FAVORITES list</p> 
19.	<p>Click on the ADD arrow.</p> 
20.	<p>The PAYSLIP option was added for this lesson.</p> <p>Users can also add their favorite websites to this list. Select the ADD CUSTOM button to add outside URLs (web site addresses) to the FAVORITES list.</p> <p>Click on ADD CUSTOM to add an outside URL to the FAVORITES list.</p> 







In the SELECTIONS list, use the arrows to rearrange the order of your options.

Step	Action
21.	<p>The ADD CUSTOM FAVORITE window appears.</p> <p>Type www.oracle.com in the LOCATION field.</p>
22.	<p>Enter a descriptive name for the web site in the NAME field.</p> <p>Type Oracle in the NAME field.</p>
23.	<p>Click on OK.</p> 
24.	<p>The link to Oracle now appears in the SELECTION field. Next, send the additions to the database.</p> <p>Click on OK to send the additions to the database.</p> 

Step	Action
25.	<p>The customizations appear in the appropriate region. Customize the home page according to individual preferences and job duties. Once the preferences are set up, every time you log in, you are able to view the home page with the specified preferences and criteria.</p> <p>You can continue to edit the HOME PAGE, as desired. This lesson next demonstrates another way you can modify a page by adding a new column.</p> <p>Click on the EDIT icon.</p> 
26.	<p>Click on the ADD COLUMN icon.</p> 
27.	<p>Click on the EDIT CONTENT icon.</p> 



You can delete this column by clicking on the DELETE (X) icon.

Step	Action
28.	<p>Make a selection of one of the AVAILABLE PLUGS. In this lesson the ASK ORACLE plug is selected.</p> <p>Click ASK ORACLE in the AVAILABLE PLUGS field.</p> 
29.	<p>Click the ADD arrow to move the item to the PLUGS IN CURRENT REGION field.</p> <p>Click on the ADD arrow.</p> 
30.	<p>The ASK ORACLE plug appears in the PLUGS IN CURRENT REGION field.</p> <p>Click on DONE when all plugs are added.</p> 
31.	<p>The added plug now displays on the right side column. Confirm the edits and return to the main page by selecting the DONE button.</p> <p>Click on DONE.</p> 
32.	<p>A new column appears to the right of the original columns.</p>



NAVIGATE: Displays a list of links to responsibilities either in the Oracle Applications or the Self Service Applications. The

PREFERENCES link lets you set global options such as your password and language.

FAVORITES: Allows users to place links to their favorite web destinations in a single region of the page. Place frequently accessed reports, news services, corporate intranet sites, or other systems needed in this region.

WORKLIST: The Worklist includes notifications that are of interest to the user, based on criteria specified by customizing this feature. Each message is time/date stamped and color-coded by priority. Users view the notifications by priority and importance.

ASK ORACLE: Since an important decision-making dynamic is to consider related subjects while reviewing specific facts, the "Ask Oracle" tool searches for reports of interest. Enter keywords or questions in the text box and click on the ASK ORACLE button. A list of reports and business questions meeting the criteria displays.

BUSINESS VIEWS CATALOG SEARCH: Business Views Catalog allows users to search for business views of interest. Enter keywords in the text box and click on the Search Views button. A list of business folders and business areas with descriptions meeting the criteria displays.

PERFORMANCE MEASURES: The Performance Measure feature allows users to display BIS measurements of interest quickly and in a visually meaningful format.

Step	Action
33.	In this lesson, you learned how to set up and create your own personalized home page. End of Procedure.

Oracle Navigation

11 The Oracle HELP Menu

Procedure

Description:

The Oracle HELP menu provides **field** help, **transaction** help, terminology definitions, online documentation, hot key combinations, and diagnostic information. The HELP menu is available in all documents and **forms**.

This lesson shows you the different Oracle HELP menu options.

Oracle Prerequisites:

- For all HELP functions to be active, it is recommended that you navigate to a form in which a **record** has been saved.



A **field** is a position on a window used to enter, view, update, or delete information. A field prompt describes each field by telling what kind of information appears in the field, or alternatively, what kind of information can be entered in the field.



Transactions are invoices, debit memos, credit memos, deposits, guarantees and chargebacks entered with a GENERAL LEDGER (GL) date that is between the beginning and ending GL dates.



A **form** is a box around a set of related information on your screen. Many windows can appear on your screen simultaneously and can overlap or appear adjacent to each other. Windows can also appear embedded in other windows. You can move a window to a different location on your screen.



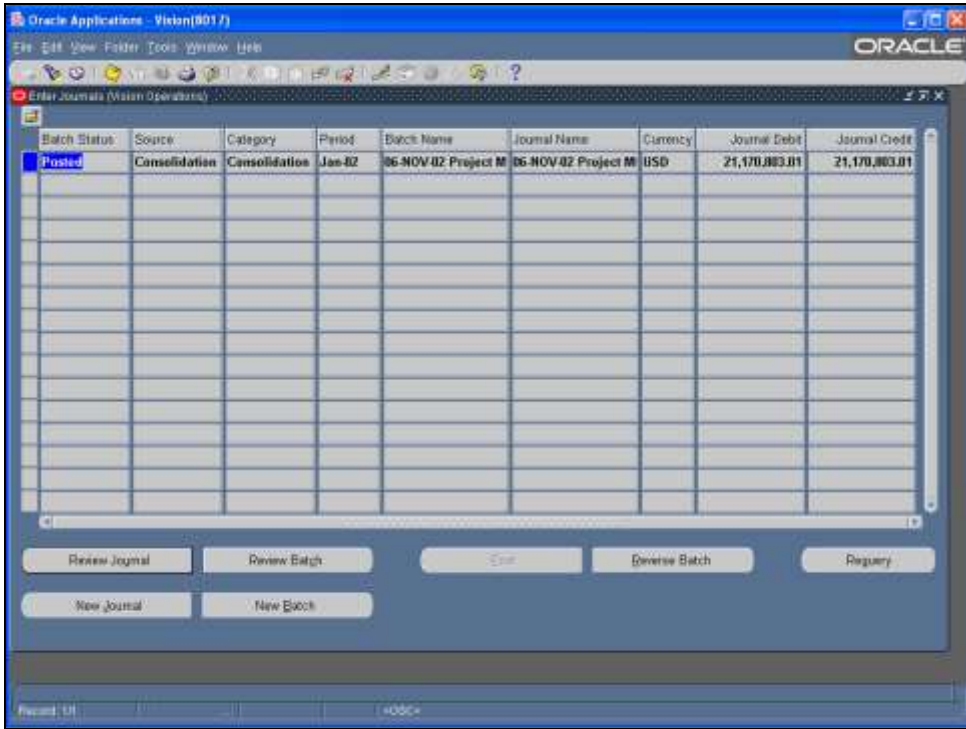
A **record** is one occurrence of data stored in all the fields of a block. A record is also referred to as a row or a transaction, since one record corresponds to one row of data in a database table or one database transaction.


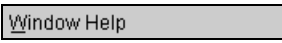
Step	Action
1.	This procedure can be performed in any responsibility. This lesson uses the GENERAL LEDGER SUPER USER responsibility. To complete this procedure, navigate to a desired form where a record is saved.



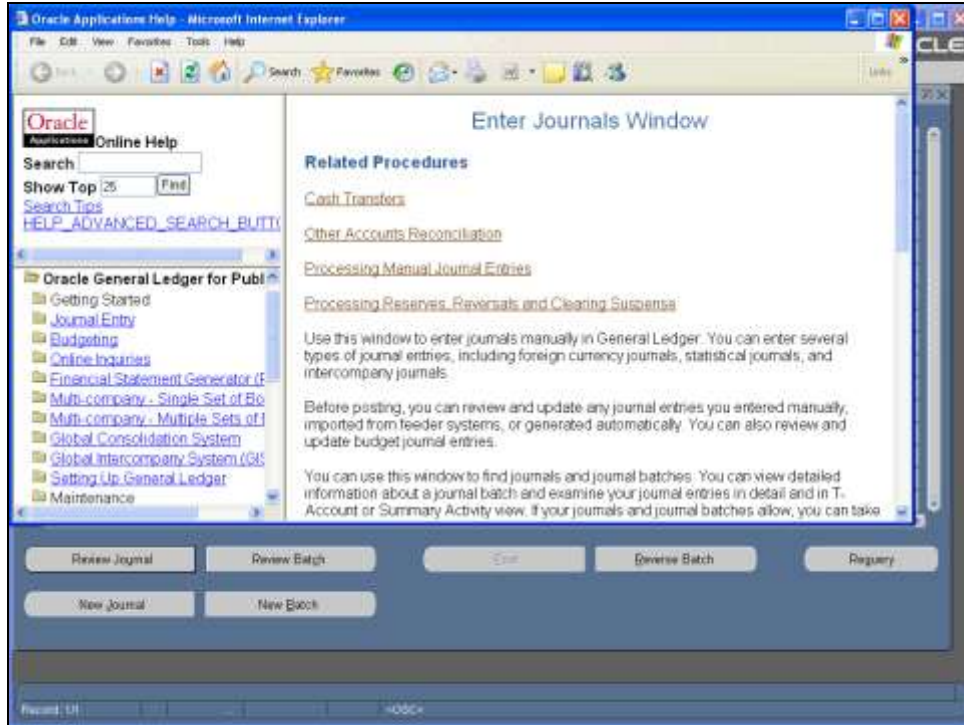
A **responsibility** is a level of authority set up by your system administrator in Oracle Applications. It lets you access a specific set of



windows, menus, set of books, reports, and data in an Oracle application. Several users can share the same responsibility, and a single user can have multiple responsibilities.

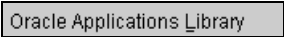



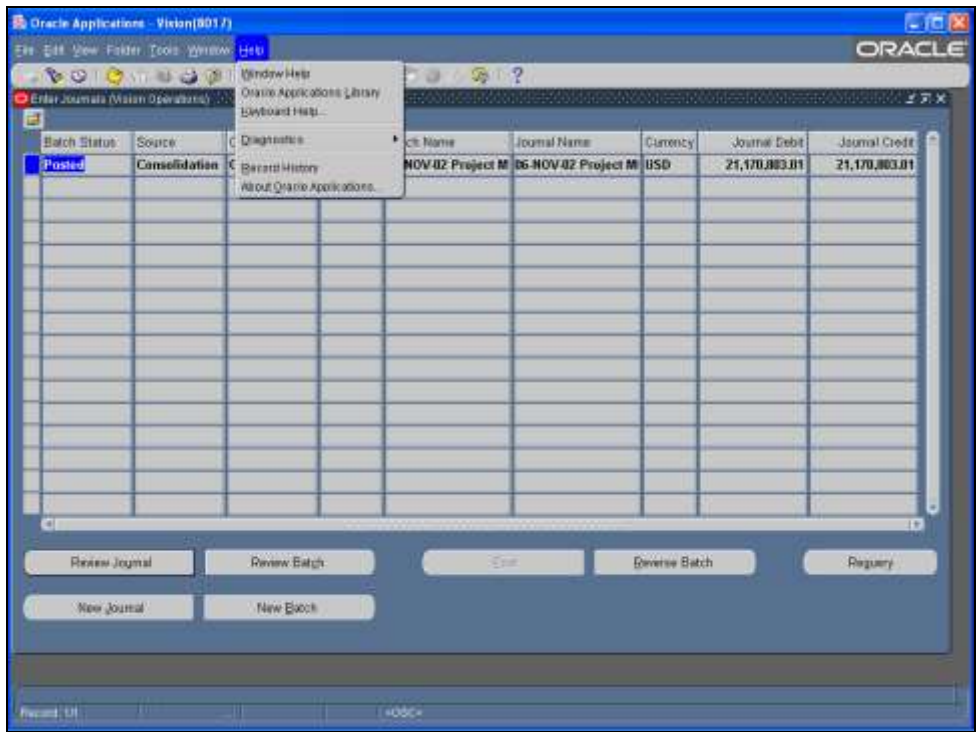
Step	Action
2.	<p>You can access the HELP menu in any Oracle module. This lesson accesses the HELP menu from the ENTER JOURNALS form in the GENERAL LEDGER module.</p> <p>Select the HELP link on the menu bar to view the menu.</p> <p>Click on the link to Oracle HELP on the menu bar.</p> 
3.	<p>Click on the WINDOW HELP link.</p> 


 **Optional.** You can also access *Window Help* by clicking on the *Question Mark* icon on the toolbar.



Step	Action
4.	<p>The <i>Window Help</i> window may not be maximized when it opens. Maximizing the window reveals more of the information.</p> <p>Click on MAXIMIZE.</p> 
5.	<p>Notice that Oracle HELP displays specific information pertaining to the open form.</p> <p>Return to the form by closing the window.</p> <p>Click on X Close Window to return to your Oracle form.</p> 

Step	Action
6.	<p>To display help for any of the Oracle Applications products, select the ORACLE APPLICATIONS LIBRARY link from the HELP menu.</p> <p>Click on the ORACLE APPLICATIONS LIBRARY link.</p> 
7.	<p>A browser window opens with general information on getting help in any Oracle application. Return to your open form by closing the window.</p> <p>Click on X Close Window to return to your form.</p> 



Step	Action
8.	<p>Selecting the KEYBOARD HELP link in the HELP menu opens a window with hot key combinations.</p> <p>Click on the KEYBOARD HELP... link.</p> 
9.	<p>The <i>Keys</i> window opens with possible hot key combinations for your forms. Use the scroll bars to view all of the possible combinations.</p> <p>Click on OK to close the window.</p>




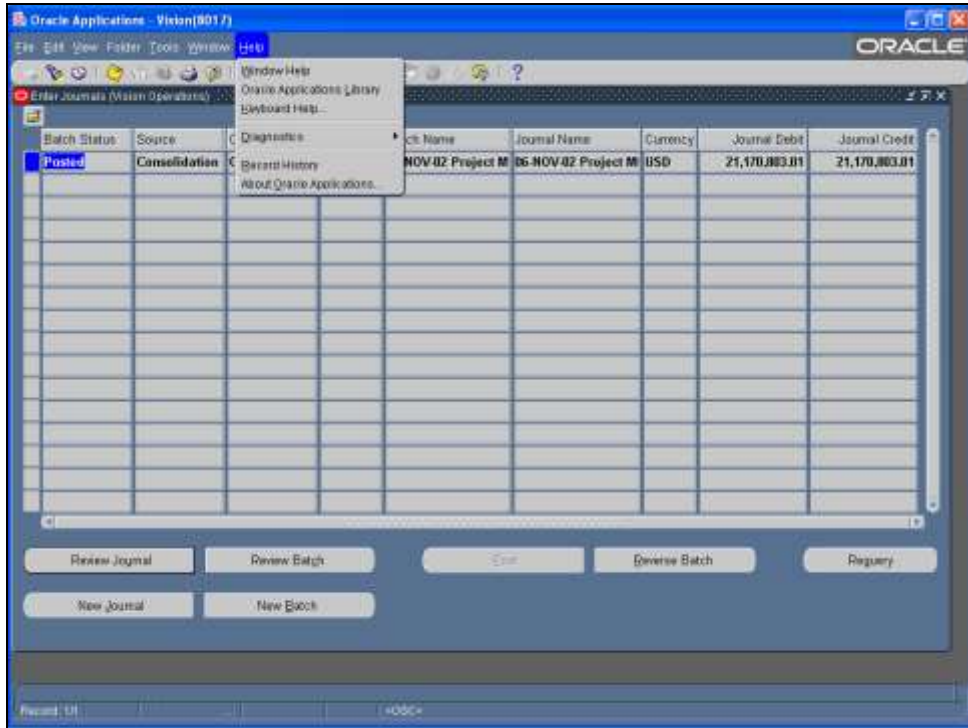
To select a hot key combination, select an item from the list and click on **OK.**

Step	Action
10.	<p>Your DIAGNOSTICS menu (Menu path: HELP > DIAGNOSTICS) provides various options for resolving issues or errors you encounter in the system. These options will not be demonstrated in this lesson.</p>

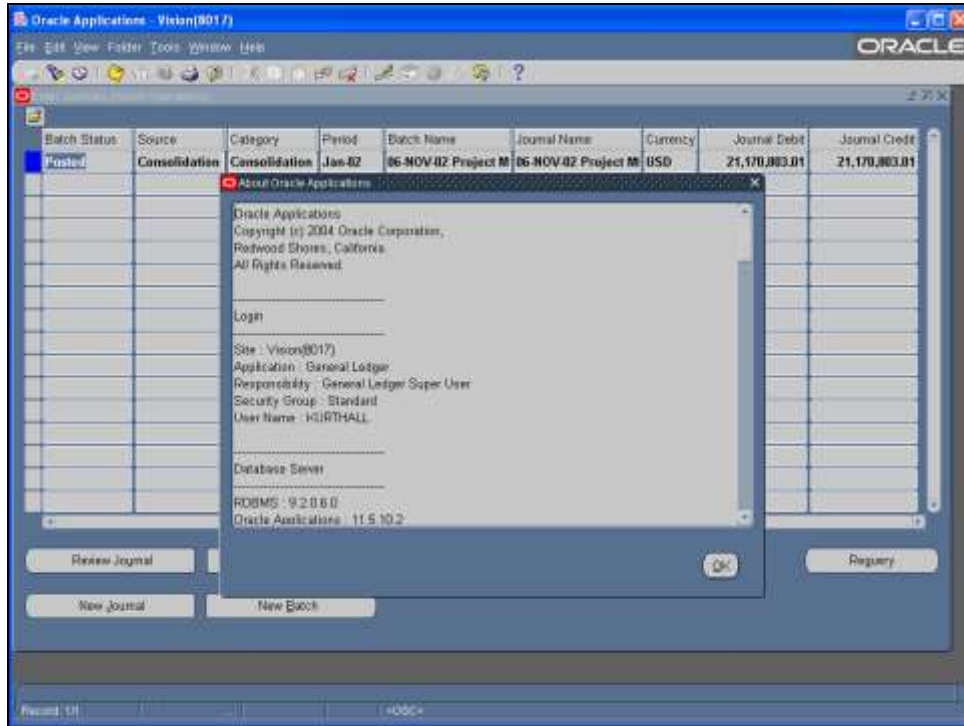


Some options in the **DIAGNOSTICS menu are only available in certain responsibilities.**

Step	Action
11.	<p>The RECORD HISTORY option is only available if actions have been taken in window.</p> <p>Click on the RECORD HISTORY link.</p> 
12.	<p>If a record history is available, a window displays such information as the user who created the selected record, creation date, and any update information. Use the scroll bar to view all of the information available.</p> <p>Click on OK to close the <i>About This Record</i> window.</p>



Step	Action
13.	<p>To view certain information about the Oracle application you are working in, select the ABOUT ORACLE APPLICATIONS link in the HELP menu.</p> <p>Click on the ABOUT ORACLE APPLICATIONS... link.</p> <div style="border: 1px solid black; padding: 2px; width: fit-content;">About Oracle Applications...</div>



Step	Action
14.	The <i>About Oracle Applications</i> window displays such information as copyright, version, and responsibility information. Use the scroll bar to view all of the information available. Click on OK .
15.	In this lesson you learned about the different Oracle HELP menu options. End of Procedure.

12 The List of Values in Oracle 11i

Procedure

Description:

A List of Values is a predefined list of choices for a certain field. You access a List of Values in a variety of ways, such as clicking on a LIST OF VALUES icon or using a List of Values hot key combination.

Oracle Prerequisites:

- You must have access to at least one Oracle responsibility.



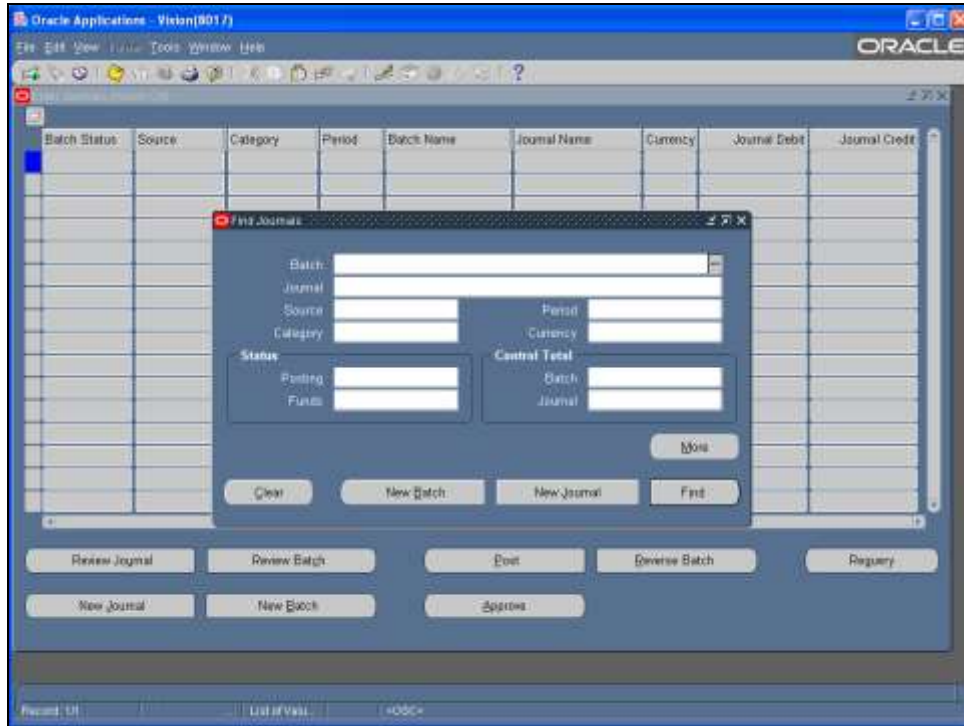
A **responsibility** is a level of authority set up by your system administrator in Oracle Applications. It lets you access a specific set of windows, menus, set of books, reports, and data in an Oracle application. Several users can share the same responsibility, and a single user can have multiple responsibilities.


Step	Action
1.	This procedure can be performed in any Oracle responsibility. This lesson uses the GENERAL LEDGER SUPER USER responsibility. To complete this procedure, navigate to a desired form.




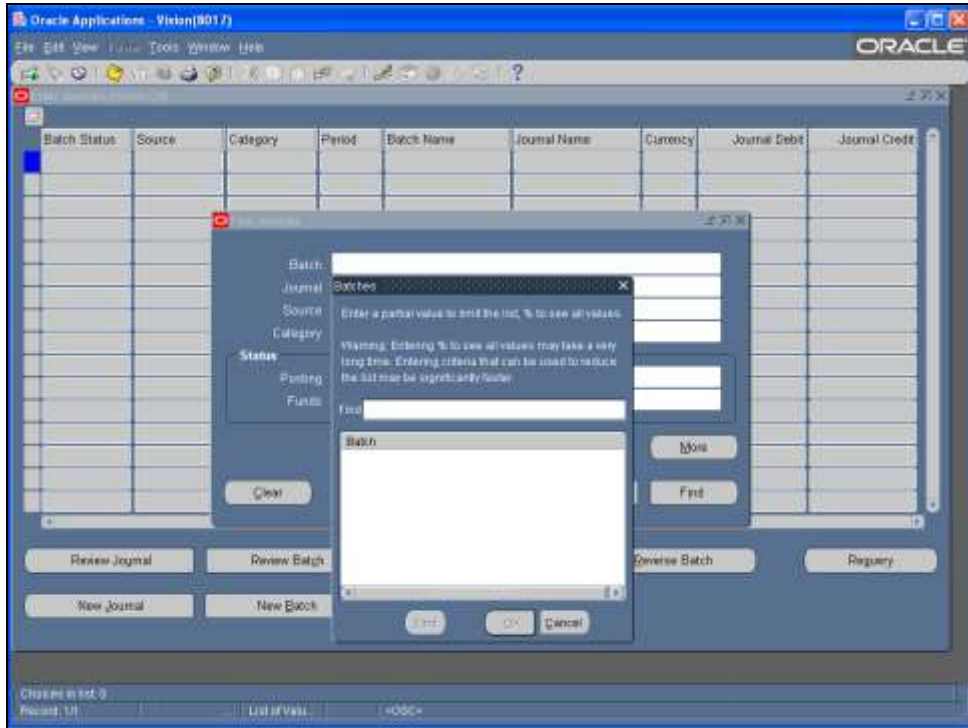
A **field** is a position on a window used to enter, view, update, or delete information. A field prompt describes each field by telling what kind of information appears in the field, or alternatively, what kind of information can be entered in the field.

Step	Action
2.	This lesson uses the FIND JOURNALS form in the GENERAL LEDGER module. Your forms may vary, however, the LIST OF VALUES functions the same in all forms-based applications.




Step	Action
3.	<p>The LIST OF VALUES icon appears on certain fields after clicking once in them. This icon indicates that free text is not allowed in a certain field.</p> <p>Click on the LIST OF VALUES icon next to the BATCH field.</p> 

 **For all fields with a LIST OF VALUES, you may enter all or a portion of the entry and press TAB on your keyboard. This will either populate the field with the appropriate entry or open a List of Values window with the choices that match your entry.**




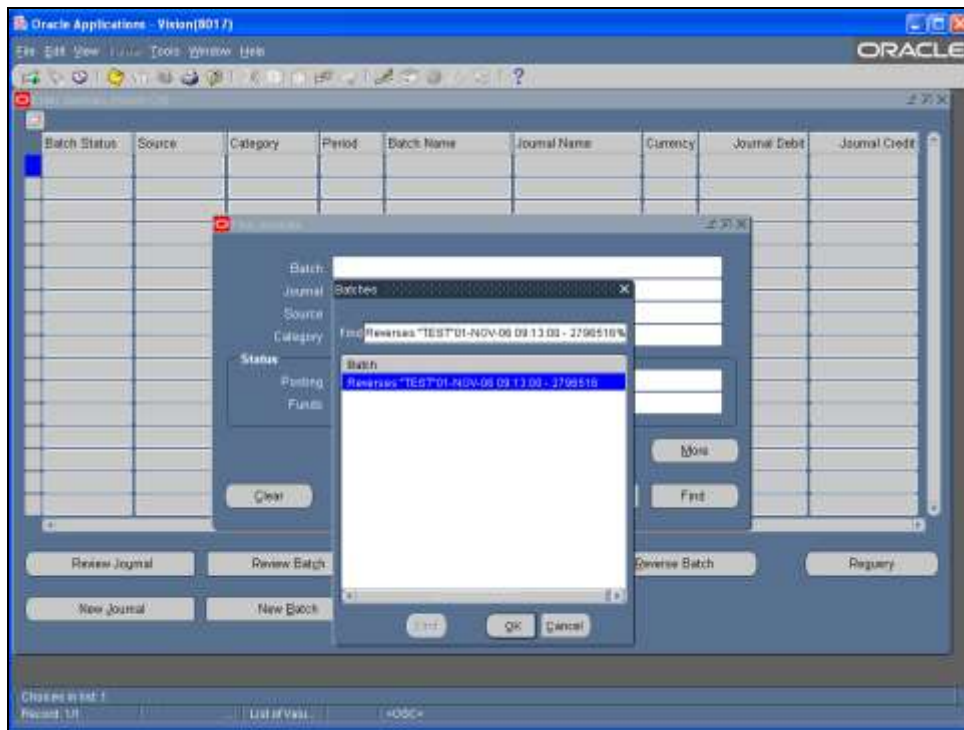
Step	Action
4.	<p>Because this field has many entries associated with it, the <i>List of Values</i> window requires you to enter descriptive data to retrieve a limited list. In some cases, the <i>List of Values</i> window immediately displays all possible entries for the field and you do not need to use the FIND field to search.</p> <p>Enter a full or partial entry. Use the percent (%) wildcard to take the place of one or more characters. In this lesson, all entries containing “R” will be retrieved.</p> <p>Type %R% in the FIND field.</p>



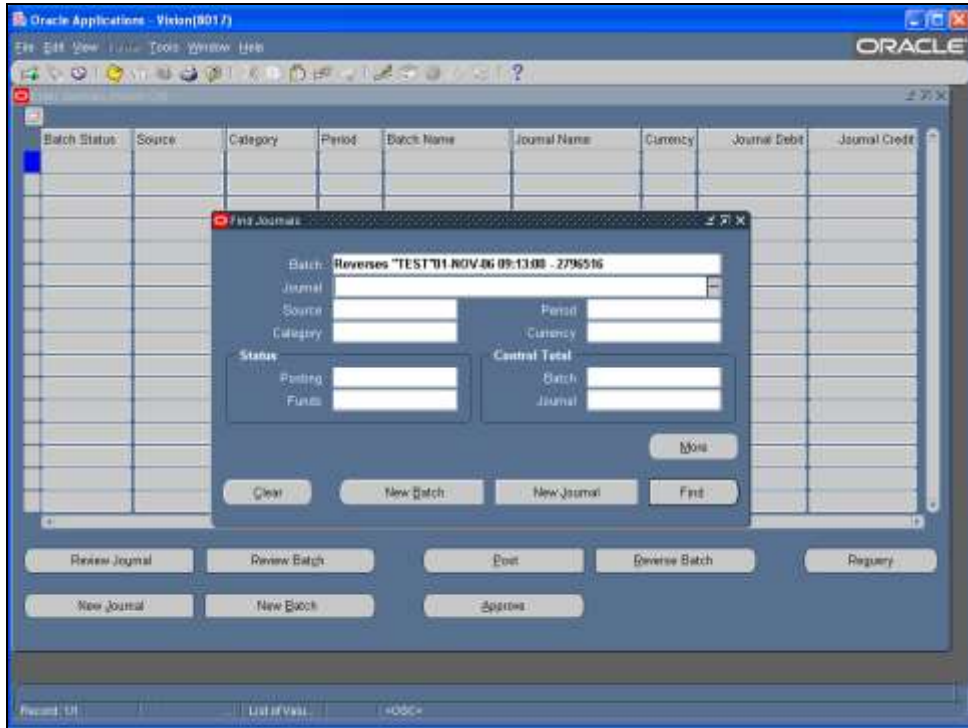
This List of Values window is not case-sensitive. If the List of Values window is blank, always enter at least a percent (%) wildcard in the FIND field and click on FIND before assuming there are no values available. Entering only a percent sign calls up all possible entries.

If your List of Values window is called Enter Reduction Criteria for Long-List, the data you enter to search MUST be case-sensitive.

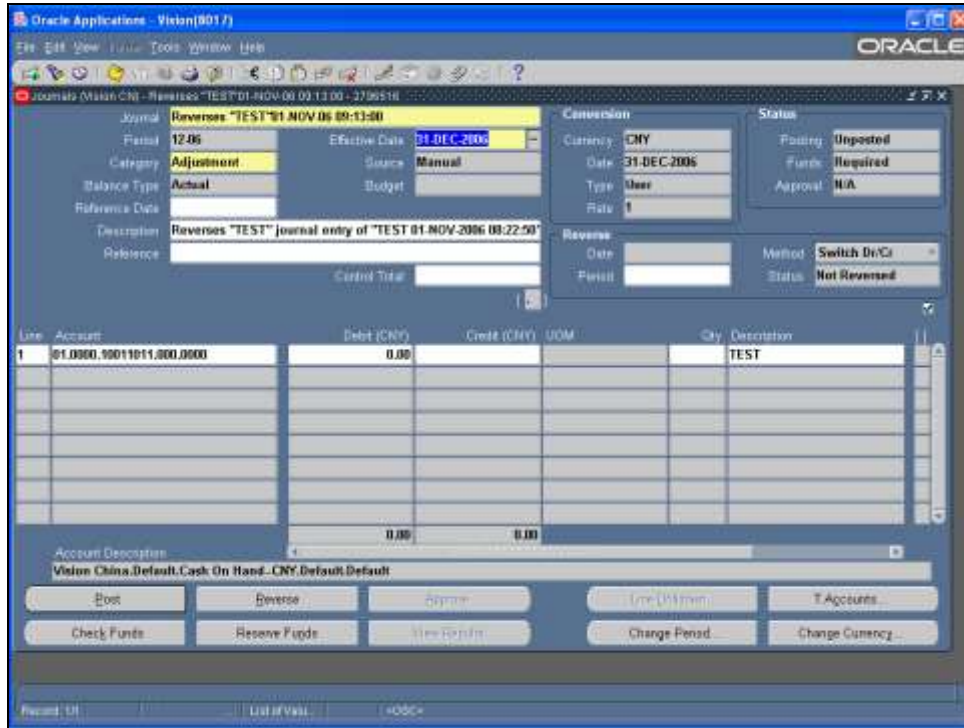
Step	Action
5.	<p>Click on FIND.</p> 



Step	Action
6.	<p>A list based on your search information appears. Select an appropriate option. In this lesson the only form is already selected.</p> <p>Click on OK.</p> <div data-bbox="464 1297 553 1346" style="border: 1px solid black; padding: 2px; display: inline-block;">OK</div>



Step	Action
7.	<p>The option you selected in the <i>List of Values</i> window displays. The steps to review this form are not demonstrated in this lesson.</p> <p>Another common List of Values option in Oracle is the <i>Calendar</i> List of Values.</p>



Step	Action
8.	<p>A <i>Calendar</i> List of Values is available for all DATE fields. To view a <i>Calendar</i> List of Values, use the keyboard to reveal EFFECTIVE DATE field's <i>List of Values</i> window.</p> <p>Press [CTRL] + [L] on your keyboard to open the EFFECTIVE DATE field's <i>List of Values</i> window.</p>



Step	Action
9.	To change the month and year, click on the UP and DOWN arrows next to the month and year.
10.	Select a number in the appropriate month and year. Click on Dec 8 as the effective date.
11.	Accept all options defined in the window. Click on OK .
12.	In this lesson, you learned how to access a List of Values in a variety of ways. End of Procedure.

13 Switch Responsibility

Procedure

Description:

If you have more than one Oracle **responsibility** assigned to you, you will periodically need to switch from one responsibility to another.

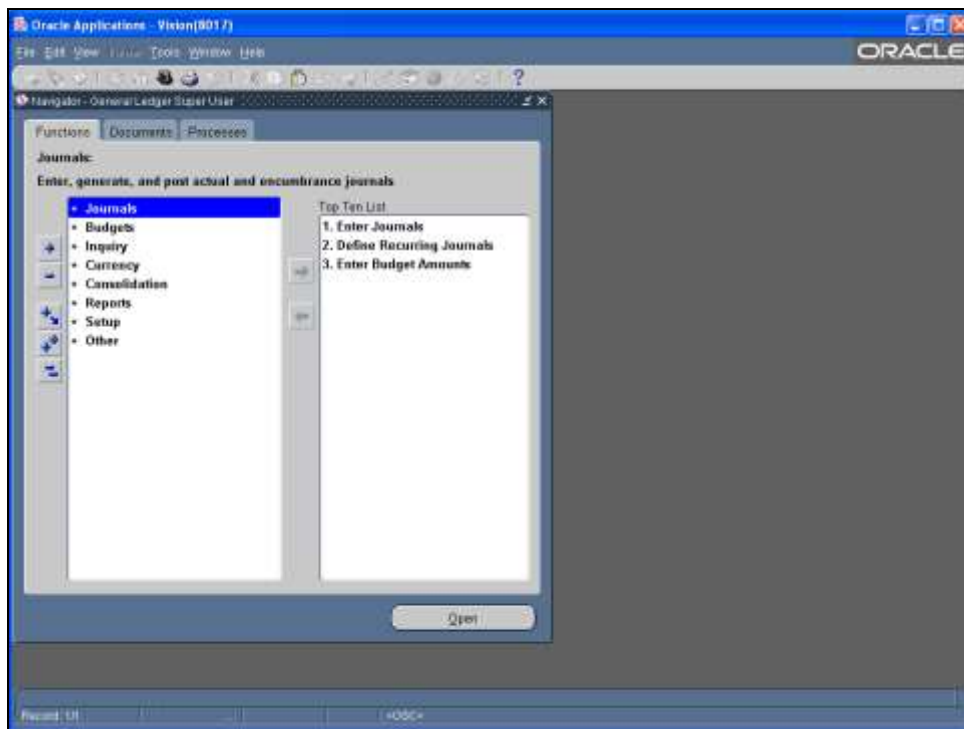
Oracle Prerequisites:


- You must have more than one Oracle responsibility assigned to you.

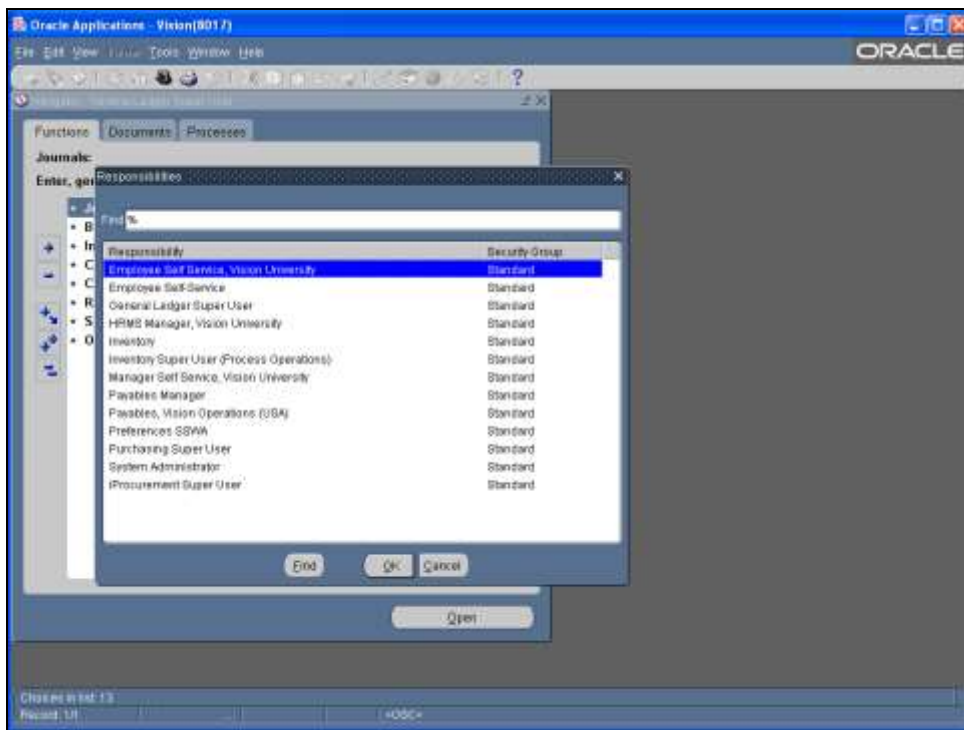


A **responsibility** is a level of authority set up by your system administrator in Oracle Applications. It lets you access a specific set of windows, menus, set of books, reports, and data in an Oracle application. Several users can share the same responsibility, and a single user can have multiple responsibilities.

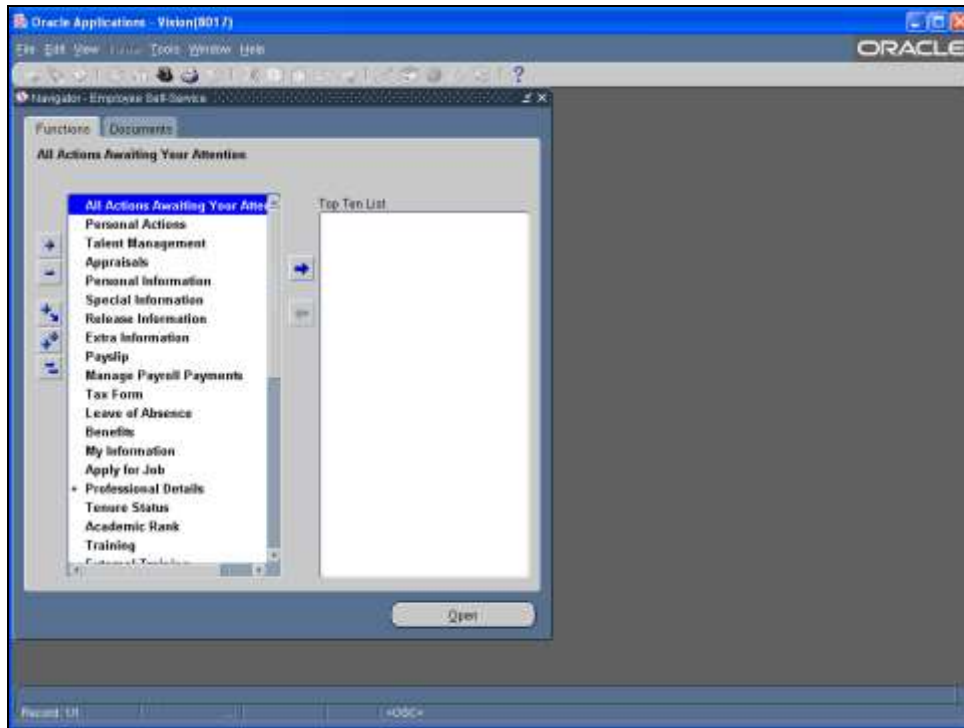
Step	Action
1.	<p>This procedure may be performed in any Oracle responsibility. This lesson uses the Oracle GENERAL LEDGER SUPER USER responsibility.</p> <p>This procedure begins at the <i>Navigator</i>.</p>



Step	Action
2.	<p>You can only switch responsibilities from the <i>Navigator</i> window. If you are in a form, the SWITCH RESPONSIBILITY icon on the toolbar and the FILE > SWITCH RESPONSIBILITY menu options are grayed out. You can either close all forms to return to the <i>Navigator</i> or click on the SHOW NAVIGATOR icon to make your <i>Navigator</i> the active window.</p> <p>Click on the SWITCH RESPONSIBILITY (Top Hat) icon.</p> 



Step	Action
3.	<p>A <i>Responsibilities</i> window opens. Select the appropriate responsibility from the list provided by either double-clicking on the list item or clicking on the item and then clicking on the OK button.</p> <p>Double-click on the EMPLOYEE SELF-SERVICE responsibility.</p>



Step	Action
4.	You are taken to the <i>Navigator</i> of the selected responsibility.
5.	In this lesson, you learned to switch from one responsibility to another. End of Procedure.

14 Search for Data

Procedure

Description:


There are two ways to search for data in Oracle: **FIND** and **QUERY BY EXAMPLE**. **FIND** displays a separate window to search for data and you may use the Lists of Values available for any **fields**. **FIND** restricts the number of fields you may search by. **QUERY BY EXAMPLE** allows you to search using any field or a combination of fields on a specific **form**.

Oracle uses wildcards to search for data. These wildcards include the percent sign (%), which takes the place of any characters.


COUNT MATCHING RECORDS can be used to determine how many **records** will be retrieved based on your data. This helps you decide whether to enter more or less restrictive search criteria.

Oracle Prerequisites:


- **Transactions** or data must have been saved in the Oracle system.




A **field** is a position on a window used to enter, view, update, or delete information. A field prompt describes each field by telling what kind of information appears in the field, or alternatively, what kind of information can be entered in the field.



A **form** is a box around a set of related information on your screen. Many windows can appear on your screen simultaneously and can overlap or appear adjacent to each other. Windows can also appear embedded in other windows. You can move a window to a different location on your screen.




A **record** is one occurrence of data stored in all the fields of a block. A record is also referred to as a row or a transaction, since one record corresponds to one row of data in a database table or one database transaction.



Transactions are invoices, debit memos, credit memos, deposits, guarantees and chargebacks entered with a GENERAL LEDGER (GL) date that is between the beginning and ending GL dates.

Step	Action
1.	This procedure can be performed in any Oracle responsibility. The GENERAL LEDGER SUPER USER responsibility is used in this lesson. To complete this procedure, navigate to a desired form.



A **responsibility** is a level of authority set up by your system administrator in Oracle Applications. It lets you access a specific set of windows, menus, set of books, reports, and data in an Oracle application. Several users can share the same responsibility, and a single user can have multiple responsibilities.




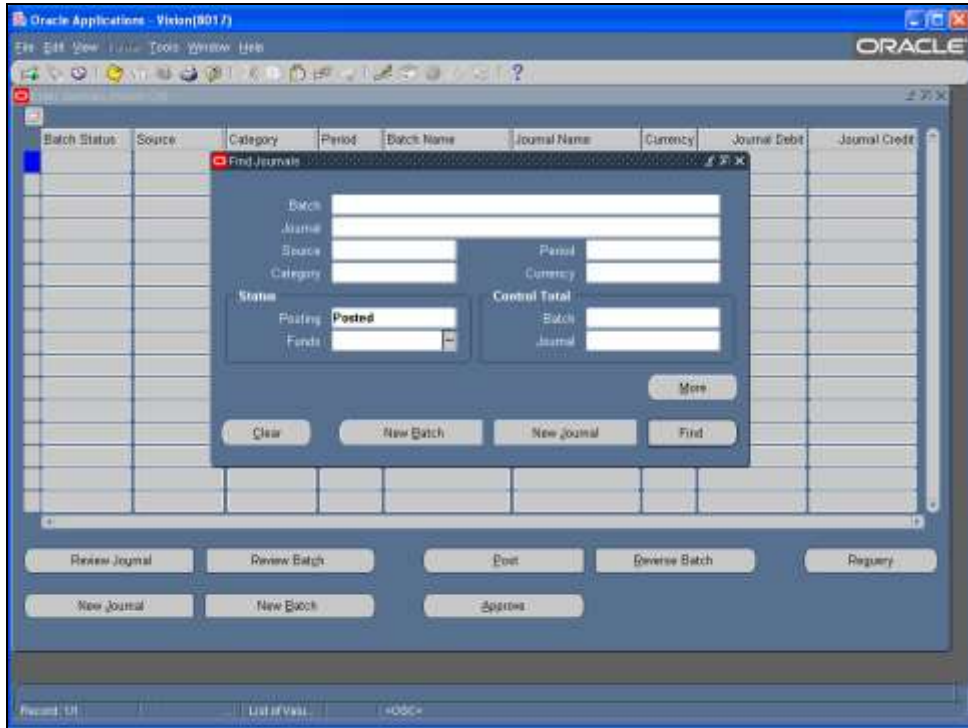
A **form** is a box around a set of related information on your screen. Many windows can appear on your screen simultaneously and can overlap or appear adjacent to each other. Windows can also appear embedded in other windows. You can move a window to a different location on your screen.

Step	Action
2.	<p>Queries and finds may be performed in any Oracle module. However, not every form in every Oracle application has a <i>Find</i> window available. If the <i>Find</i> window is not available, the FIND icon in the toolbar will either be grayed out or you will receive a message indicating you must use a Query by Example to search for data.</p> <p>This lesson uses the ENTER JOURNALS form in the GENERAL LEDGER module.</p>




A **query** is a search for applications information that you initiate using an Oracle Applications window.

Step	Action
3.	<p>To execute a query, follow the menu path VIEW > FIND or click on the FIND icon on the toolbar.</p> <p>Click on the Search Flashlight icon.</p> 

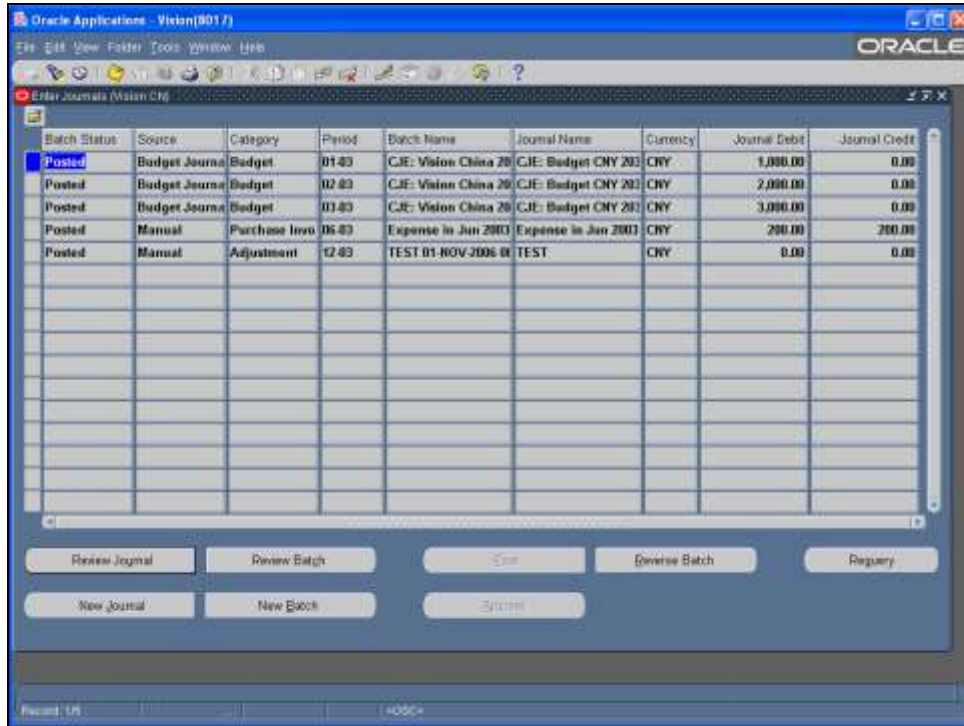


Step	Action
4.	<p>You can use any of the fields in this window to locate data. Enter your search criteria, if any. In many cases, you can leave all fields blank to retrieve all records in the database. If the <i>Find</i> window does not allow you to leave all fields blank, an error message will appear when you click on the FIND icon. This lesson searches by POSTED in the POSTING field.</p> <p>Click on FIND.</p> <div data-bbox="370 1297 526 1344" style="border: 1px solid black; padding: 2px; display: inline-block;">Find</div>




The FIND window is customized to the particular object you are trying to locate. Performing FIND functions in different modules and windows will produce windows that allow you different search options relevant to the object you wish to locate.

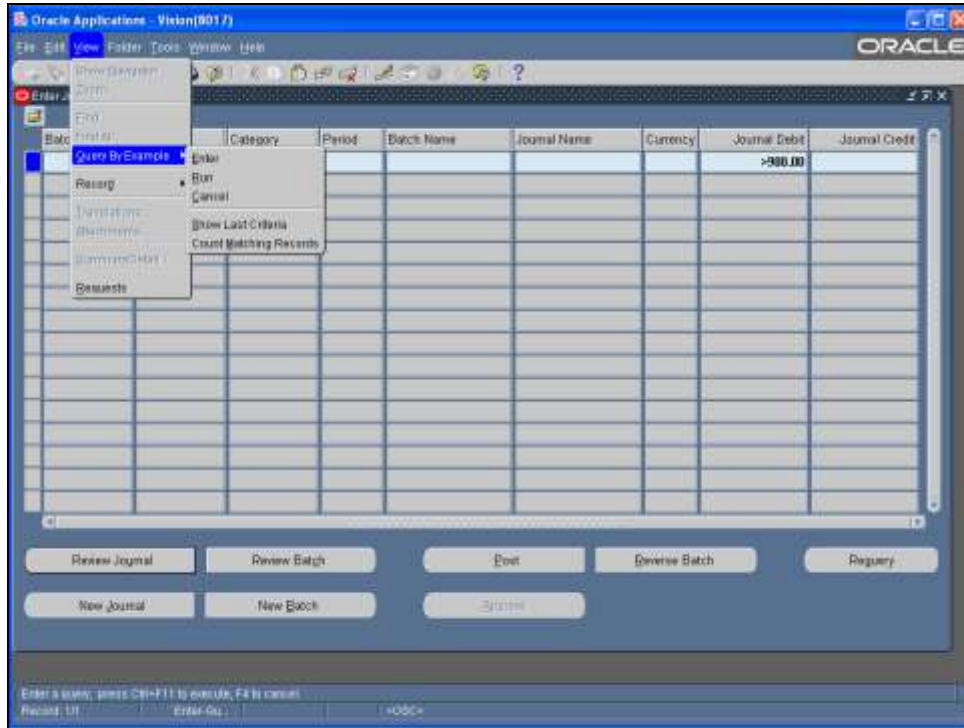
Note that if your search criteria are broad and there are many records in the database, Oracle may take several minutes to complete the search.



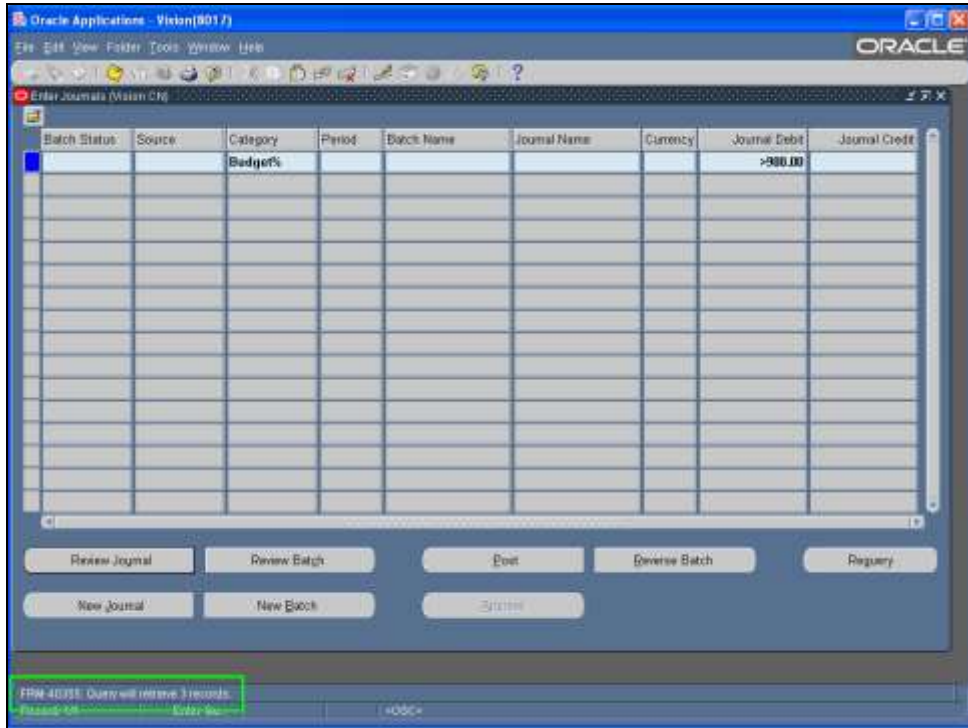
Step	Action
5.	<p>Records based on your search criteria display. If no records are found, a message appears at the bottom of the screen indicating that no records meet your search criteria. Repeat your search using different criteria.</p> <p>You can also perform a Query by Example to locate data.</p>



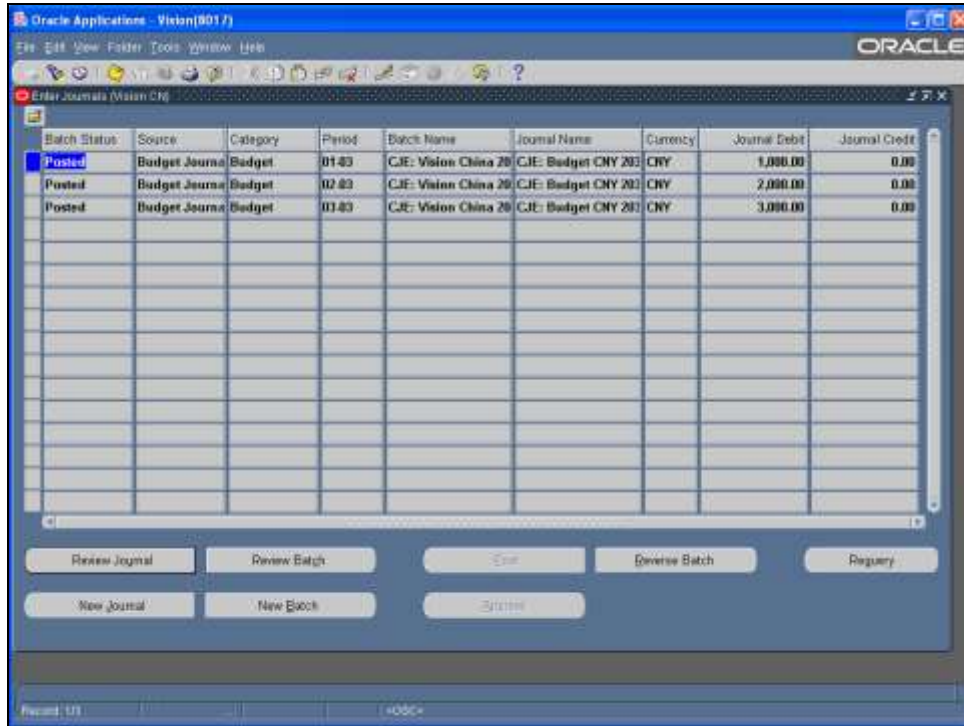
Step	Action
6.	<p>A Query by Example occurs on the form in which your record displays.</p> <p>To enter a Query by Example, follow the menu path VIEW > QUERY BY EXAMPLE > ENTER or press [F11] on your keyboard.</p> <p>Click on ENTER in the QUERY BY EXAMPLE submenu.</p> 
7.	<p>The fields available for your search turn blue. Enter your search criteria into the appropriate fields. You can use wildcards to locate data. The percent sign (%) takes the place of one or more characters.</p> <p>Type B% in the CATEGORY field.</p>
8.	<p>Other operators, such as GREATER-THAN and LESS-THAN (> <) can be used in Query by Examples.</p> <p>Type a second criterion of >900.00 in the JOURNAL DEBIT field.</p>



Step	Action
9.	<p>Before executing your query by example, you may want to select COUNT MATCHING RECORDS in the QUERY BY EXAMPLE menu.</p> <p>Follow the menu path VIEW > QUERY BY EXAMPLE > COUNT MATCHING RECORDS.</p> <p>Click on COUNT MATCHING RECORDS.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">Count Matching Records</div>



Step	Action
10.	If you select this option, Oracle will display, at the bottom of the screen, the number of records that will be retrieved if you run the query as it is.
11.	Next, run your query. Either follow the menu path VIEW > QUERY BY EXAMPLE > RUN or press [CTRL] + [F11] on your keyboard. Press [CTRL] + [F11] on your keyboard.



Step	Action
12.	The records meeting your search criteria display.
13.	In this lesson, you learn to search for data using FIND and QUERY BY EXAMPLE. End of Procedure.

15 Run Requests

Procedure

Description:

Most **responsibilities** contain a variety of reports and processes that can be run. Oracle uses the term **REQUEST** to mean both reports and processes. Reports display information and do not affect the data in the database. Processes manipulate the data in Oracle.

You can run one request at a time, called a **SINGLE REQUEST**, or a group of requests, called a **REQUEST SET**. This lesson demonstrates running a single request.

Oracle Prerequisites:

- There are no prerequisites to this procedure.

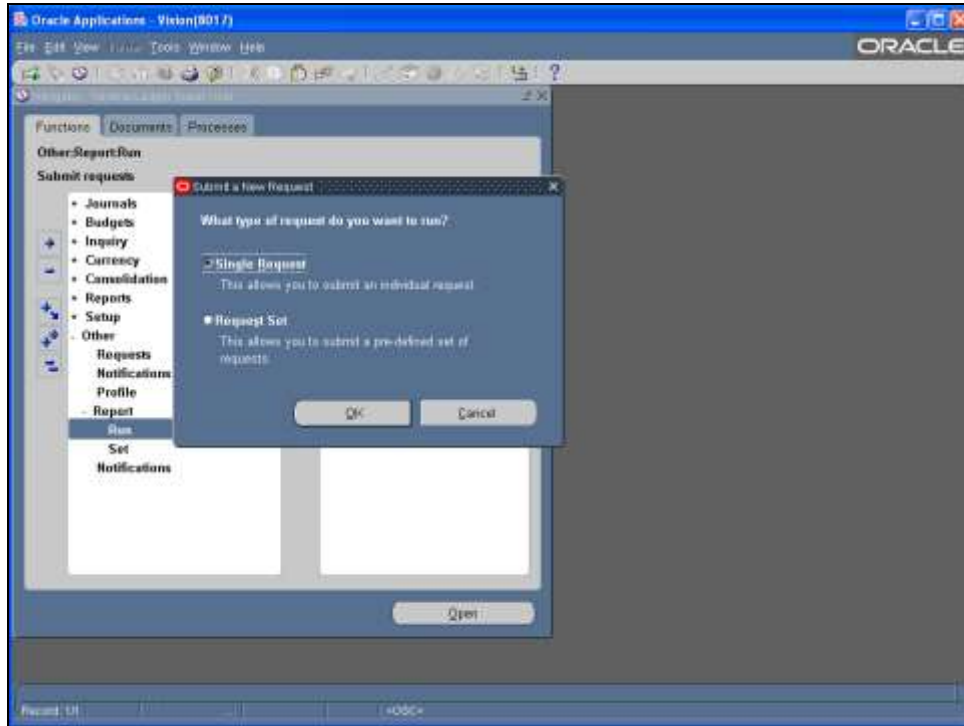




To rename your page, click on the page name and click on the **RENAME** button. To delete your page, click on the page name and click on the **DELETE** button. Edit pages by clicking on the page name and then clicking on the **EDIT** button. This example demonstrates viewing the created page before editing it.

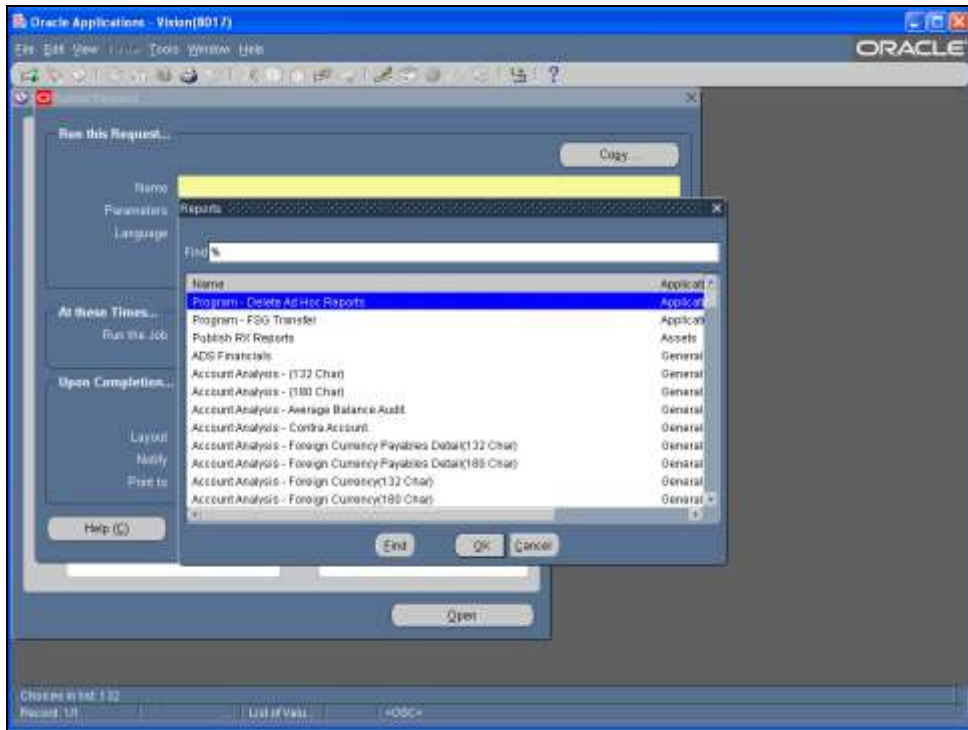


A **process** is a set of Oracle activities that need to be performed to accomplish a business goal.

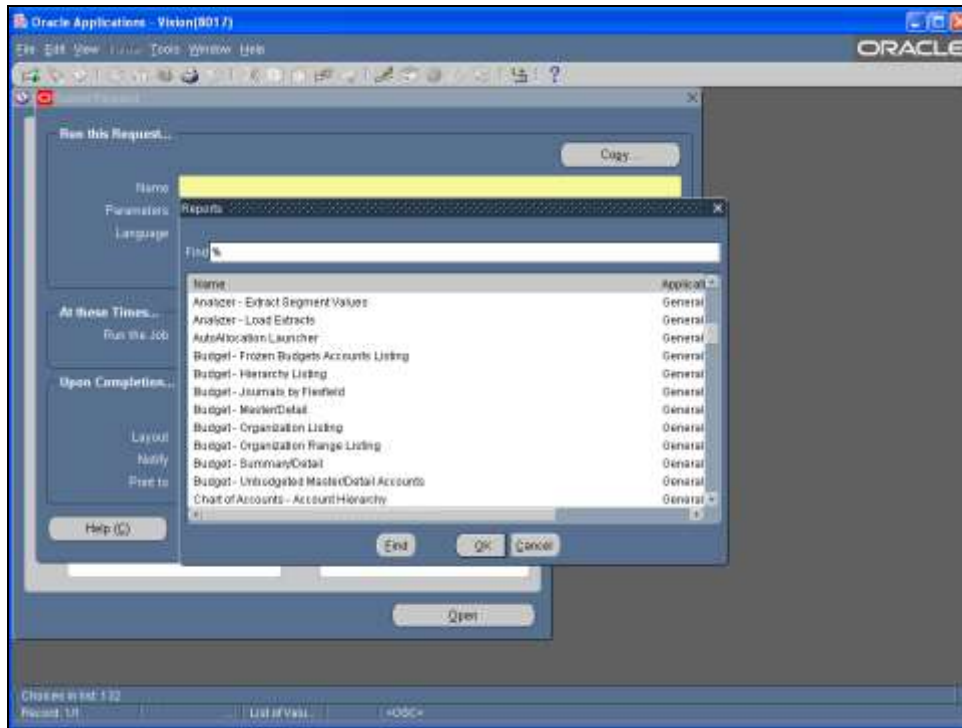
Step	Action
1.	<p>Navigate to any forms-based responsibility. This lesson uses the GENERAL LEDGER SUPER USER responsibility.</p> <p>The menu path for running requests varies between responsibilities. Frequently, requests can be run from within the following menus:</p> <ul style="list-style-type: none"> • OTHER • REPORTS • REQUESTS
2.	<p>Although the menu path varies, the process is the same across most forms-based responsibilities. This lesson follows the <i>Navigator</i> path OTHER > REPORTS > RUN.</p> <p>The <i>Submit a New Request</i> window launches when you click on OPEN.</p> <p>Click on OPEN to launch the <i>Submit a New Request</i> window.</p> <div data-bbox="370 1222 618 1264" style="border: 1px solid black; padding: 2px; display: inline-block;"> Open </div>



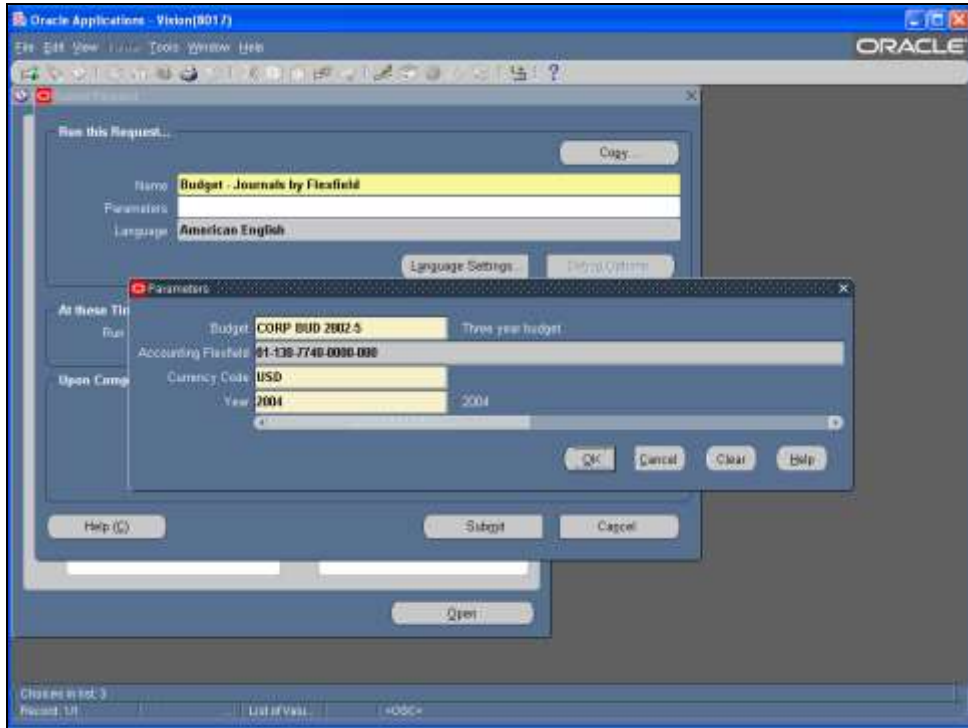
Step	Action
3.	<p>The <i>Submit a New Request</i> window allows you to select the type of request you would like to run.</p> <p>The SINGLE REQUEST radio button defaults. SINGLE REQUEST is used to run one request only.</p> <p>Select the REQUEST SET radio button to run a pre-defined collection of requests. Request sets can be set up by your organization to run multiple reports at one time.</p> <p>Click on OK.</p> 
4.	<p>The <i>Submit Request</i> window opens. The NAME field contains a List of Values, which identifies all possible reports and processes that can be run for your responsibility.</p> <p>Click on the NAME field's List of Values icon.</p> 




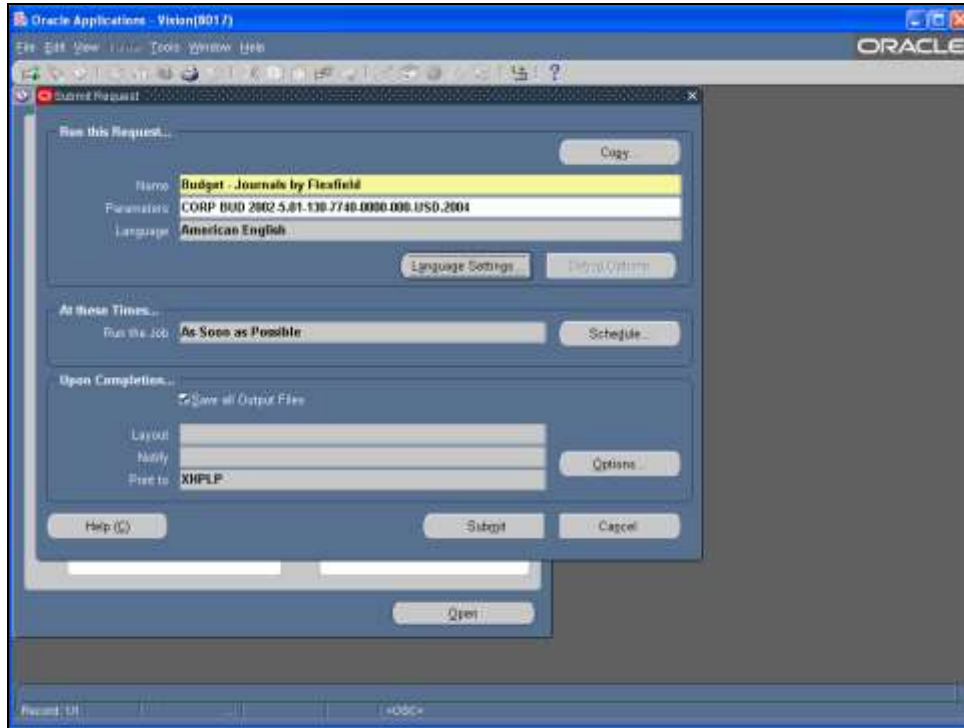
Step	Action
5.	A list of all possible reports and processes displays. The requests that are available depend on the responsibility selected. Select the request you would like to run. Use the scroll bar if the report or process is not visible.



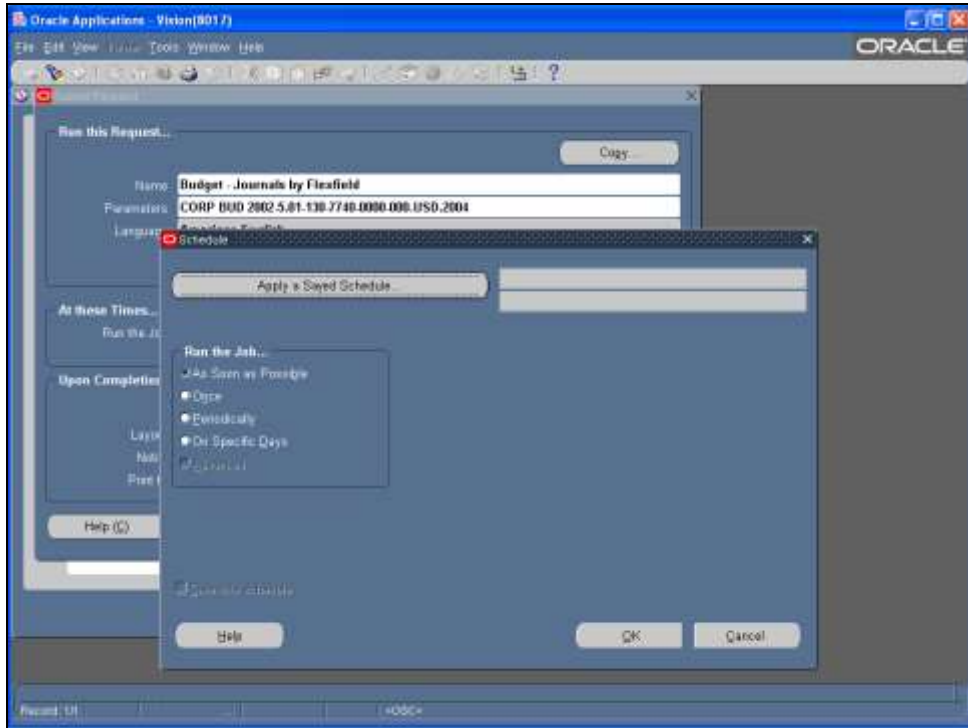
Step	Action
6.	Double-click on BUDGET - JOURNALS BY FLEXFIELD .
7.	<p>A Parameters window may open automatically. Parameters identify the specific data that displays on the report or is manipulated by the process. The parameters are different for each request; the parameters displayed in this lesson will not apply to other requests you may choose.</p> <p>In some cases, no Parameters window opens. If no Parameters window opens, then no parameters are required for the selected request.</p>



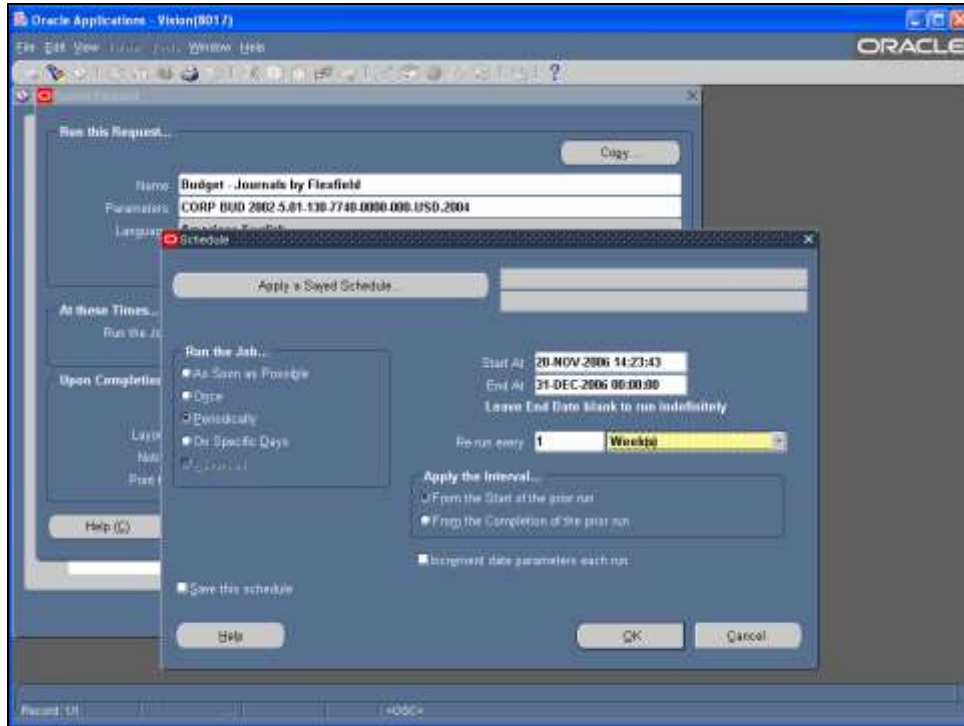
Step	Action
8.	<p>Complete your parameters, if needed. The more parameters you complete, the more specific the report or process will be. In some cases, you can leave all parameters blank to run a request on all possible data. The parameters have been completed for you.</p> <p>Click on OK.</p> 



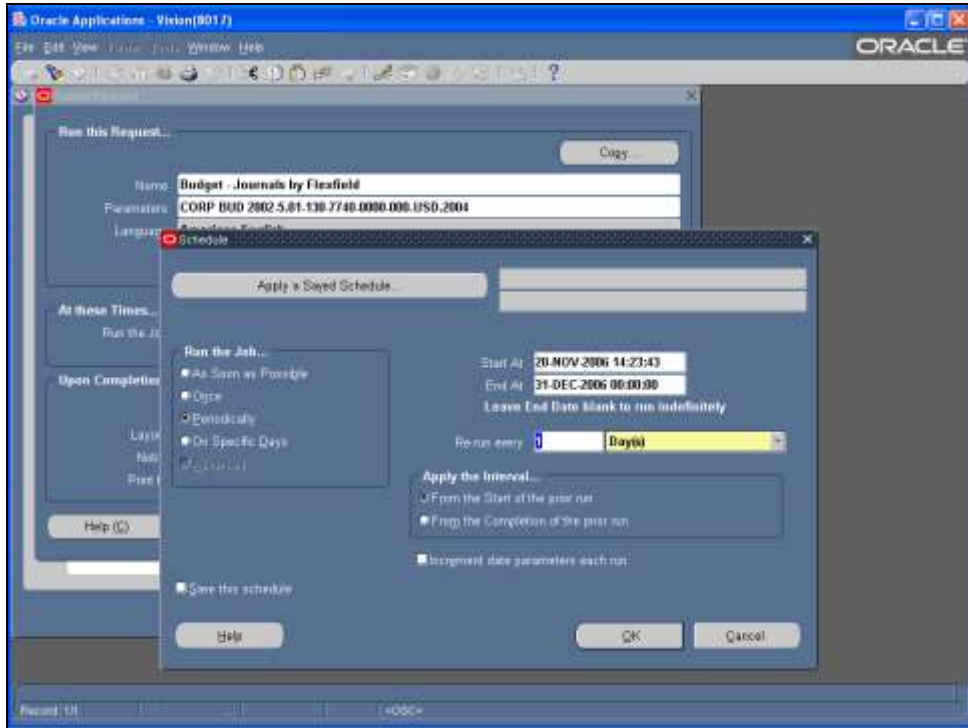
Step	Action
9.	<p>At this point, you can submit the request. The request will run as soon as possible and will print or not print based on your default printing options.</p> <p>You can, however, schedule your request to run at a different time or on a periodic basis and you can override your default printing options.</p> <p>Click on SCHEDULE... to schedule your request to run at a different time or periodically.</p> <div style="border: 1px solid gray; padding: 2px; display: inline-block; margin-left: 20px;">Schedule...</div>




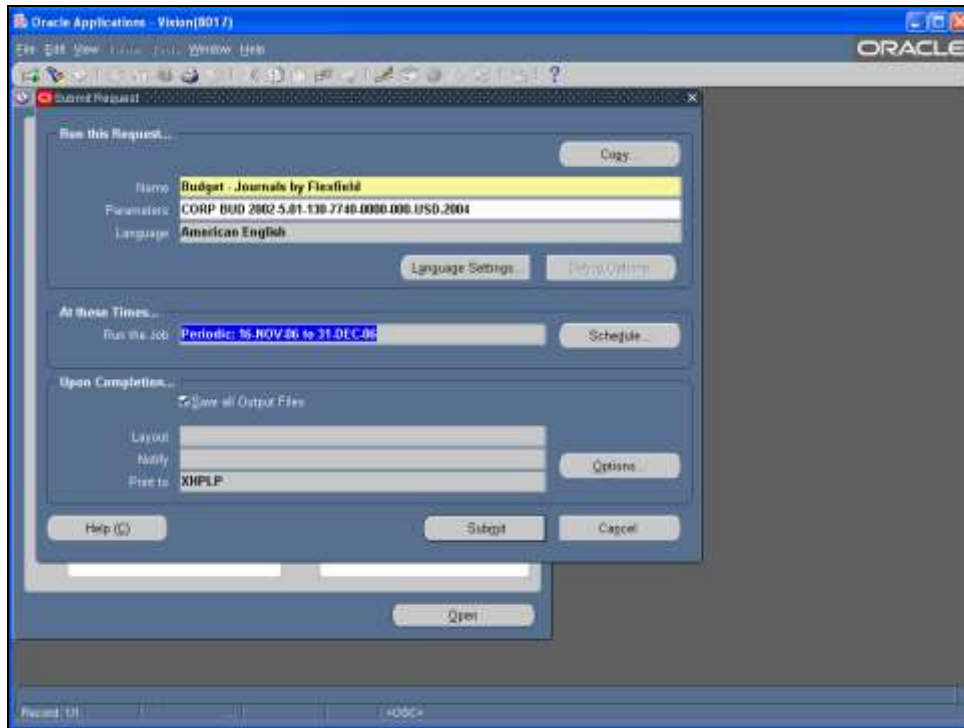
Step	Action
10.	The Schedule window allows you to specify when this request runs. The fields on the right side of the window change based on the radio button selected in the <i>Run the Job</i> region.

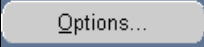


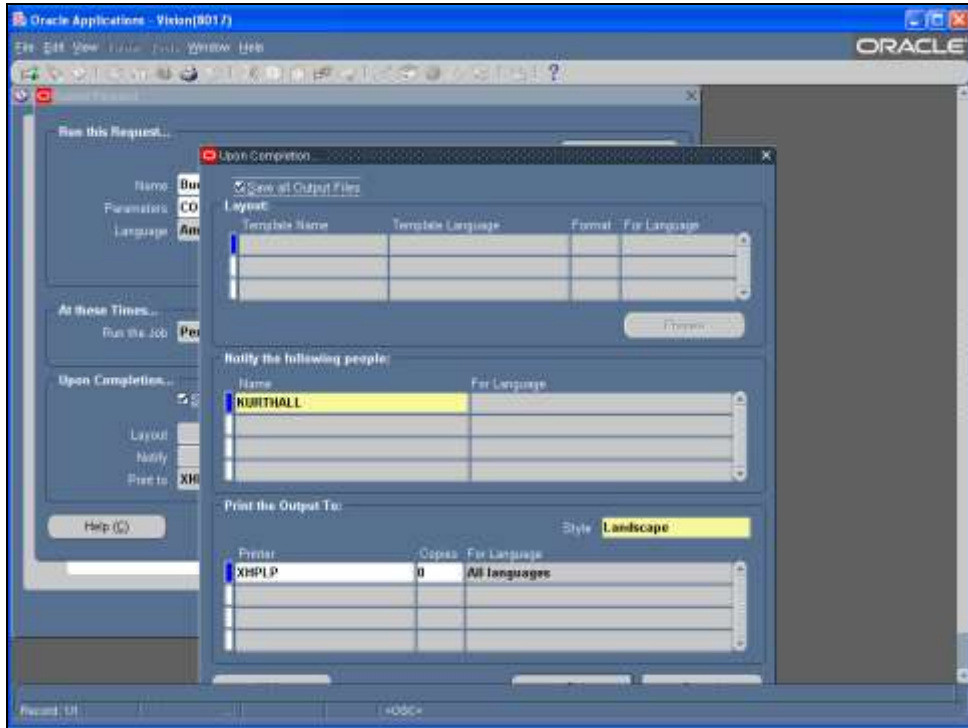
Step	Action
11.	For this lesson, the PERIODICALLY option is selected, the END AT date entered, and the RE-RUN EVERY 1 WEEK(S) changed for you.
12.	Select the SAVE THIS SCHEDULE checkbox to save the schedule you specified. When you save a schedule, you can then apply it to other requests you need to run. Click on APPLY A SAVED SCHEDULE to select the schedule you saved.

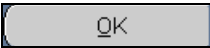


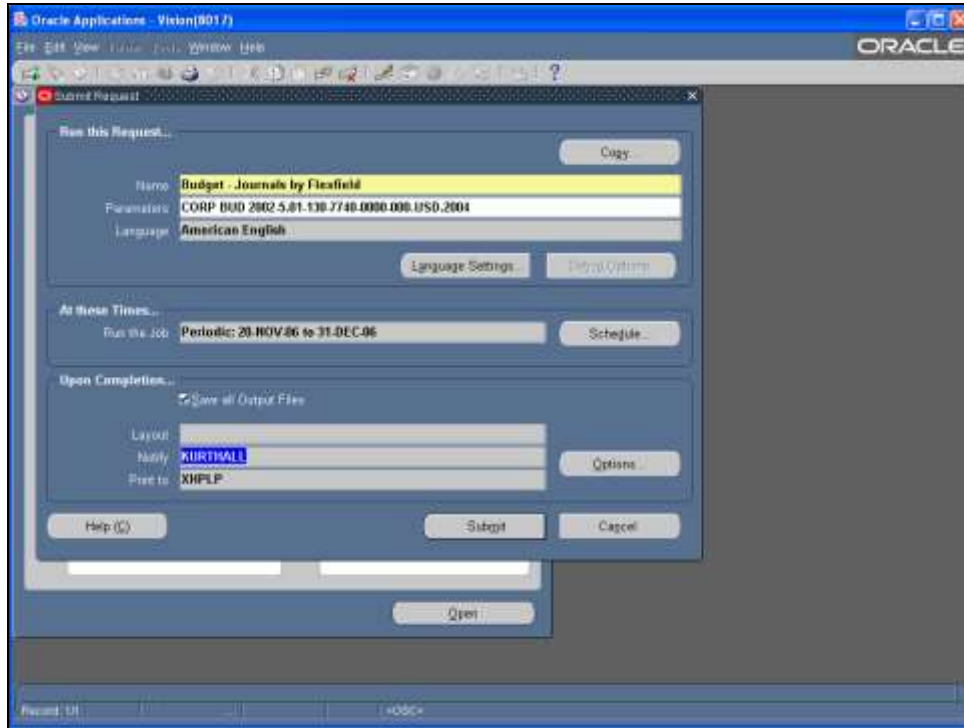
Step	Action
13.	Click on OK . 



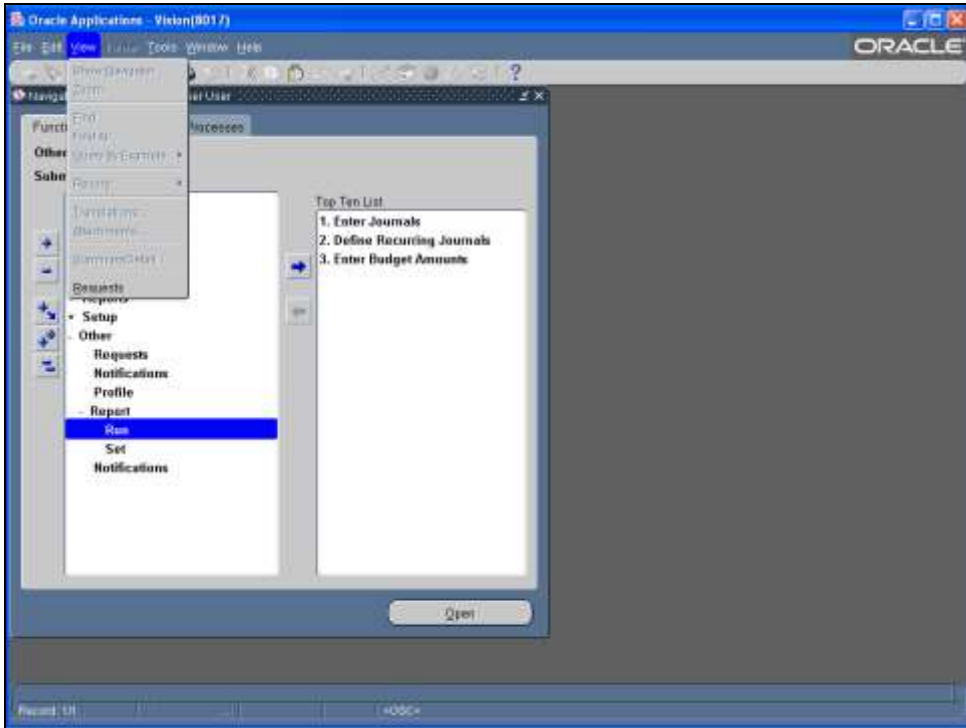
Step	Action
14.	<p>Your schedule information displays in the RUN THE JOB field.</p> <p>Click on OPTIONS... to set your printing and notification options.</p> 
15.	<p>Select the SAVE ALL OUTPUT FILES checkbox saves the results of the request you are running in an online format. It is recommended to always select this checkbox. Saving the output file allows you to review the results of your request or troubleshoot any issues.</p>



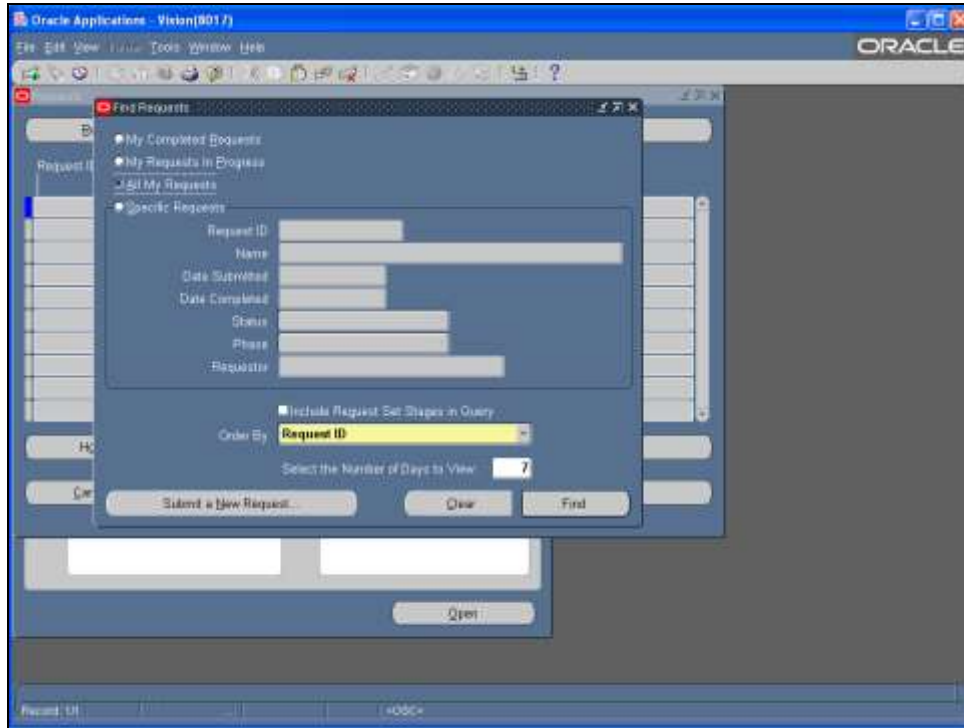
Step	Action
16.	The <i>Notify the Following People</i> region allows you to select one or more Oracle users who should receive a notification that the request has submitted. You can identify yourself in this region for periodic processes – when the process completes, a workflow notification is sent to you reminding you to review the results.
17.	If you would like to print the output of this request, select the appropriate printer. Specify the number of copies you would like to print. If you would not like a printed copy of the request, enter 0.
18.	Use the scroll bar to reveal the OK button if necessary. Click on OK . 



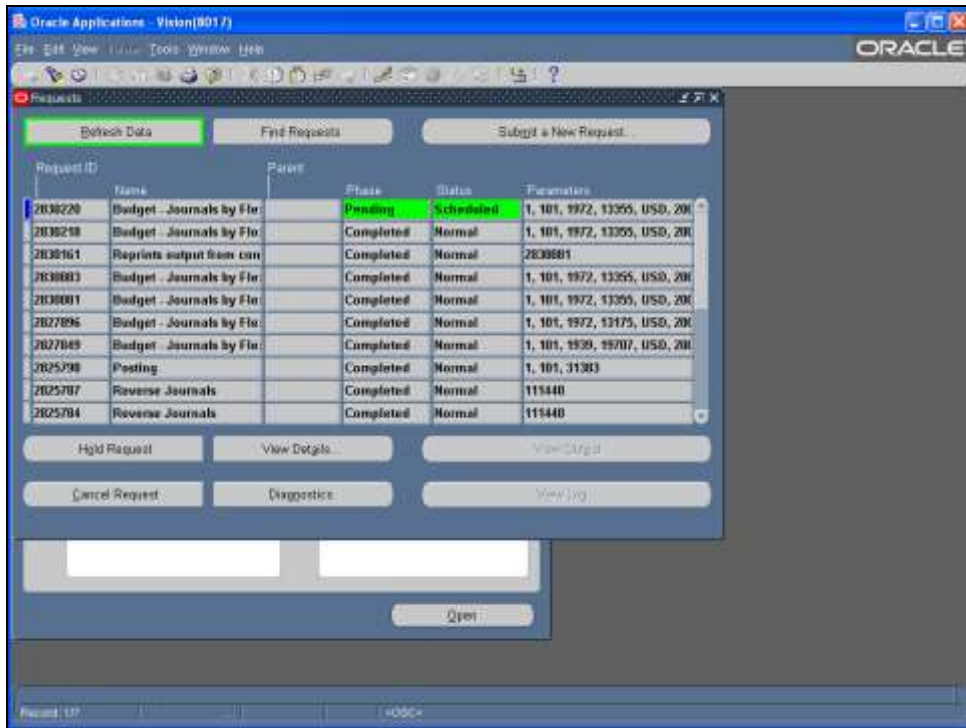
Step	Action
19.	Click on SUBMIT to submit the request. <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-top: 5px;">Submit</div>



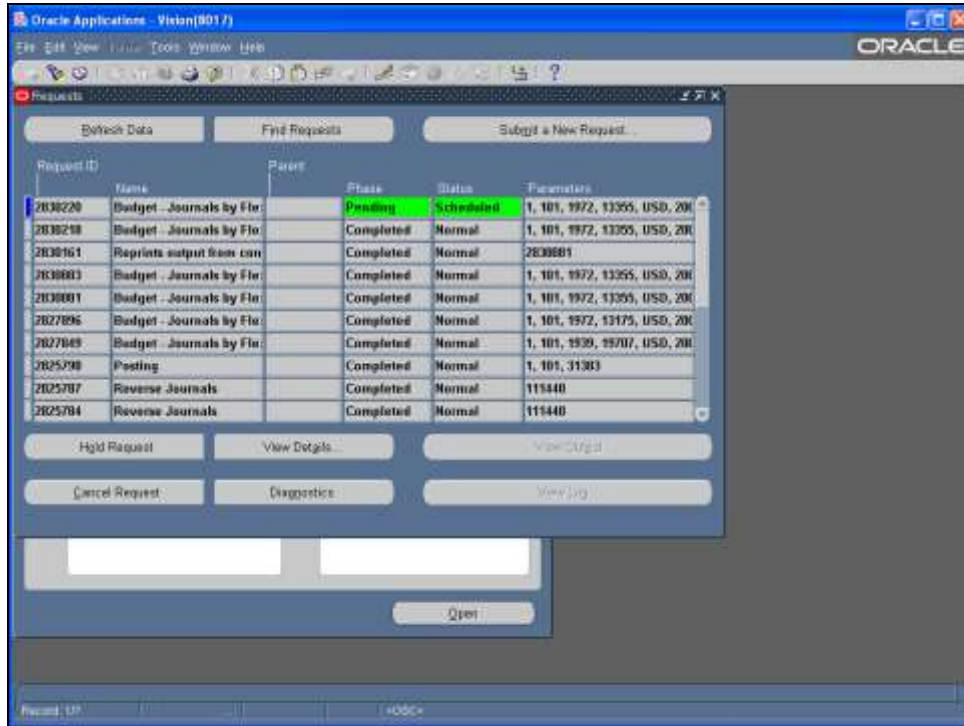
Step	Action
20.	<p>Depending on your system setup, the <i>Requests</i> window may open automatically. This window displays the status of your request and allows you to view your reports or any log files online. If this window does not open automatically, as shown here, you can access it by following the menu path VIEW > REQUESTS.</p> <p>Click on REQUESTS.</p> <div data-bbox="370 1262 574 1310" style="border: 1px solid black; padding: 2px; display: inline-block;">Requests</div>



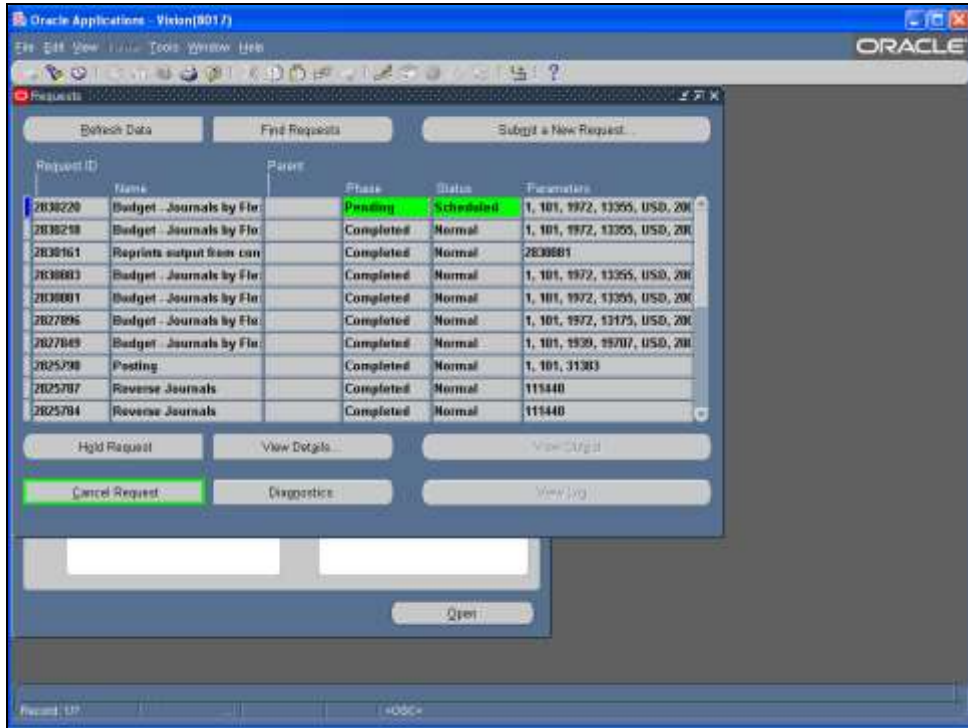
Step	Action
21.	<p>The ALL MY REQUESTS radio button is the default selection. Click on the FIND button to accept the default selection.</p> <p>Click on FIND.</p> <div data-bbox="464 1188 647 1241" style="border: 1px solid black; padding: 2px; display: inline-block;">Find</div>



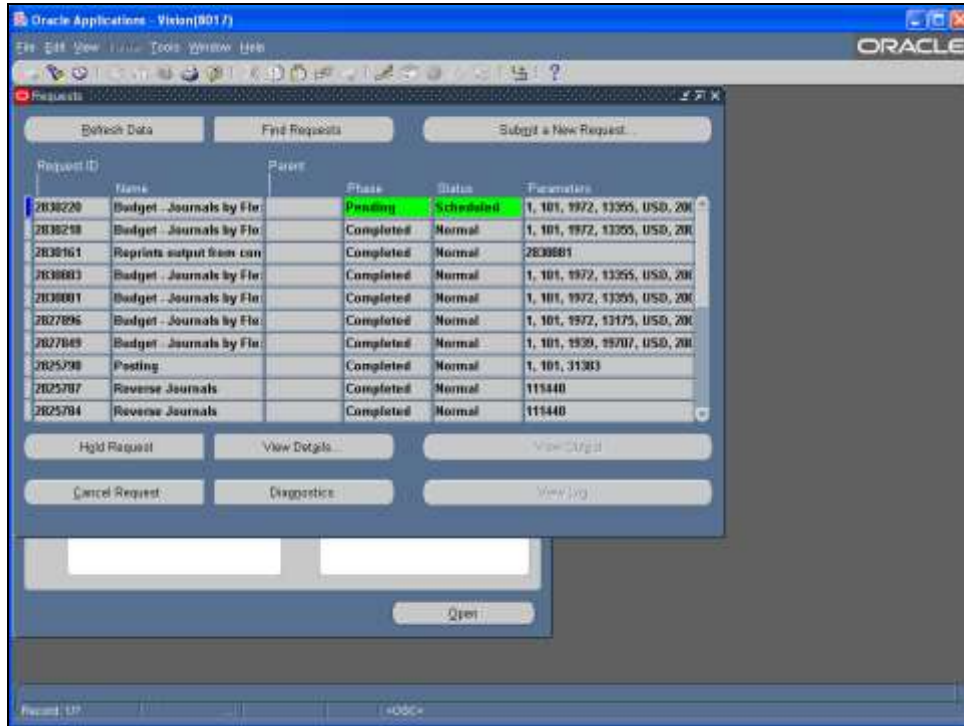
Step	Action
22.	Select REFRESH DATA to refresh this screen and receive the latest status of your request. This does cause network traffic and database activity so refreshing your data should be done in limited cases.
23.	The PHASE fields identifies whether the request is PENDING, RUNNING, or COMPLETED. The STATUS field specifies whether the request is NORMAL, has completed with a WARNING, or has completed in ERROR.





Step	Action
24.	Selecting HOLD REQUEST pauses the request. This option is only available for PENDING or RUNNING requests. Make sure the request you need to hold is selected.
25.	Selecting VIEW DETAILS reviews your scheduling and printing options for the selected request.

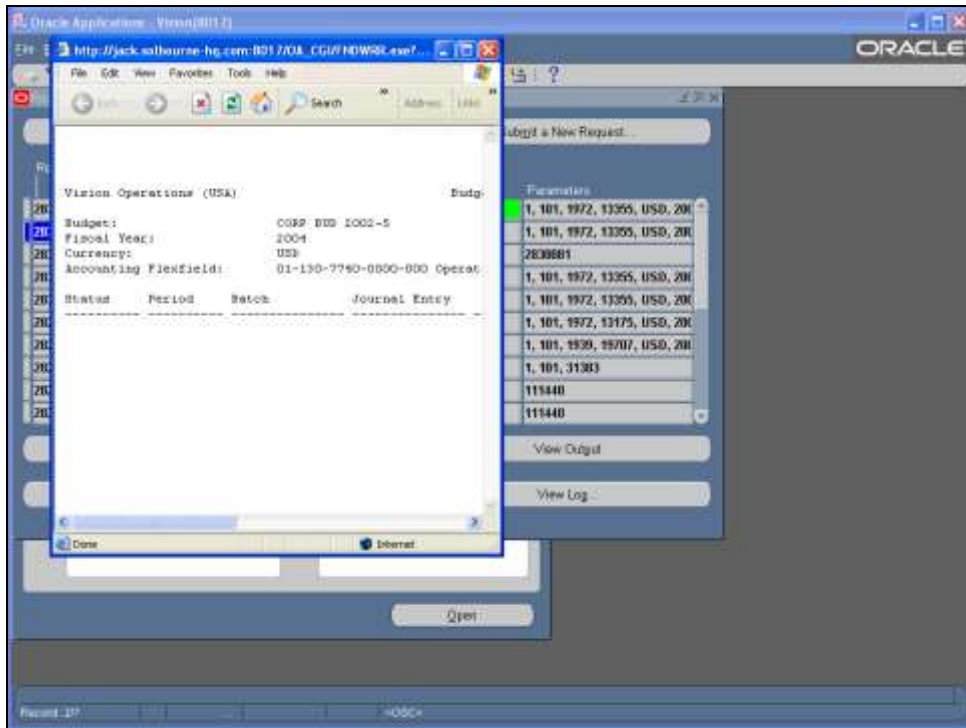



Step	Action
26.	Select CANCEL REQUEST to stop the request and remove it from the queue.
27.	Notice that in this lesson, the request that ran immediately is completed. Because this request was scheduled to run periodically, the next scheduled request is pending with a status of SCHEDULED. This request will automatically run at the scheduled date and time.

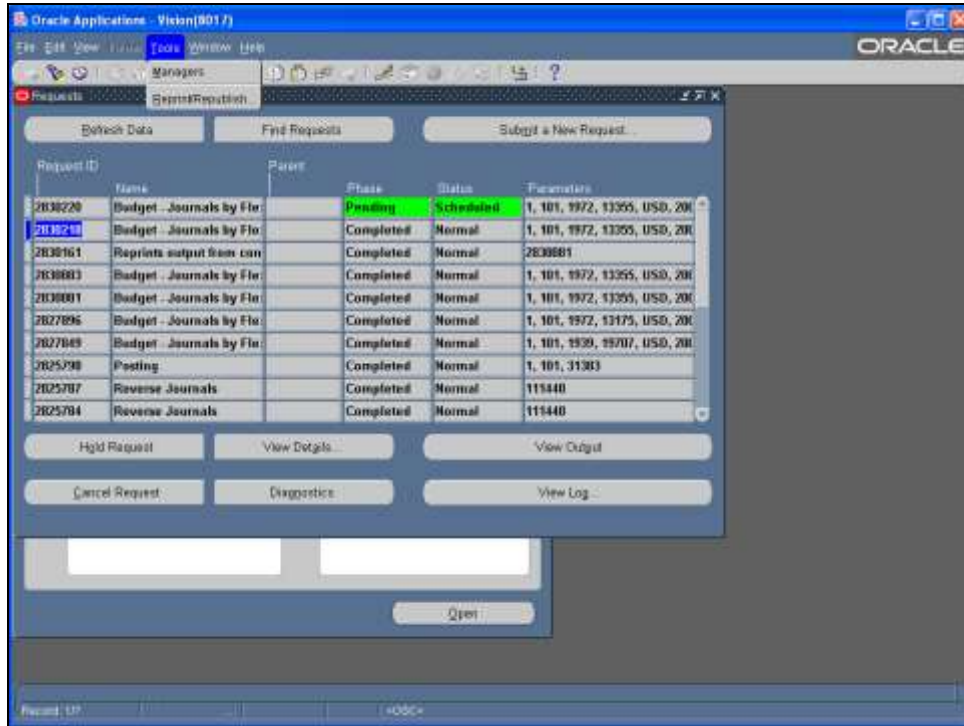



Step	Action
28.	Select the request you would like to view by clicking anywhere in that line. Click on the request with 2830218 as the REQUEST ID.
29.	Click on VIEW OUTPUT to review the results of the completed request. 

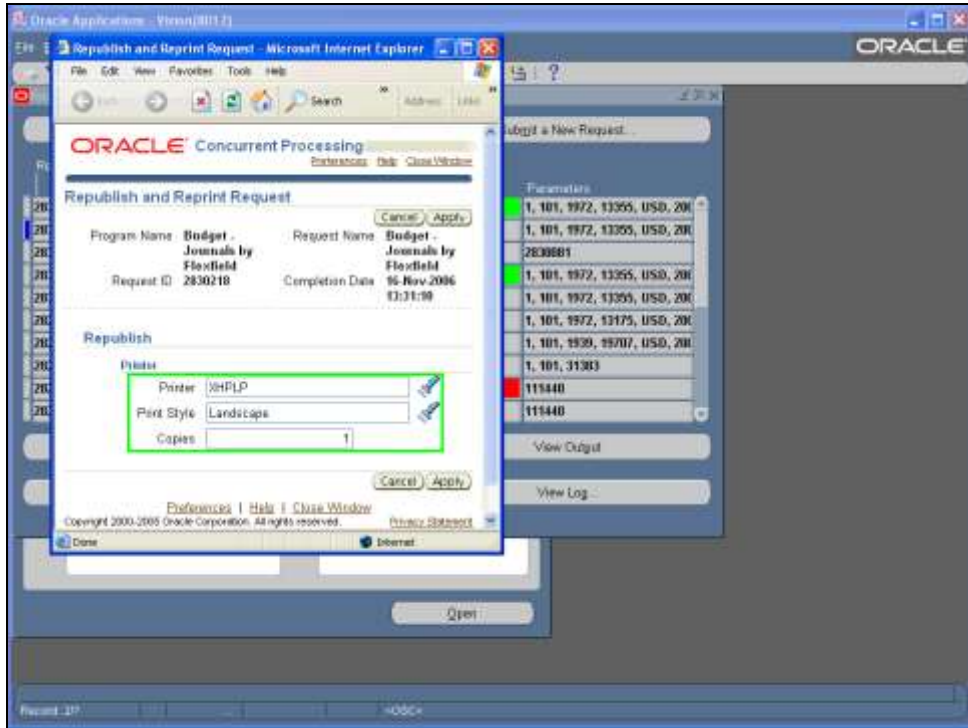
 **Some requests do not generate an output file. If no output is generated, click on VIEW LOG to review any completion messages that may have been generated. The log identifies whether any errors were encountered or whether the request completed successfully.**




Step	Action
30.	<p>The results of the request display. If you selected print options before running the report, the information displayed in this screen will automatically print to your specified printer.</p> <p>Depending on your system setup, your report may display in an Oracle form. This form provides additional options, such as navigating to specific pages of the report and specifying a font size.</p>
31.	<p>It is recommended that you review your report online before printing it to ensure it is not larger than expected.</p> <p>Click X Close Window.</p> 



Step	Action
32.	<p>If you would like to print a new copy of the report, you can do so from the <i>Requests</i> window. Follow the menu path TOOLS > REPRINT/REPUBLISH.</p> <p>Click on REPRINT/REPUBLISH.</p> <p></p>



Step	Action
33.	<p>Select the printer where the report should be printed, the print style for the report, and the printer where the report should be printed.</p> <p>Click on APPLY.</p> 
34.	<p>Your report has printed. You can navigate to the <i>Requests</i> window at any time by following the menu path VIEW > REQUESTS. The status of any pending requests will refresh each time you navigate to this window.</p>
35.	<p>In this lesson, you learned how to run, view, and print a single request. End of Procedure.</p>

16 Menus

Procedure

Description:

The Oracle Applications menus allow you to invoke standard Oracle forms functions, such as "Clear Record", as well as application-specific functions.

This lesson describes the most common menu items and their corresponding functions and processes.

Oracle Prerequisites:

- You must have access to at least one Oracle **responsibility**.



A **form** is a box around a set of related information on your screen. Many windows can appear on your screen simultaneously and can overlap or appear adjacent to each other. Windows can also appear embedded in other windows. You can move a window to a different location on your screen.



A **function** is a stored procedure that defines business rules, performs automated tasks within an application, or retrieves application information. The stored procedure accepts standard arguments and returns a completion result.




A **process** is a set of Oracle activities that need to be performed to accomplish a business goal.



A **responsibility** is a level of authority set up by your system administrator in Oracle Applications. It lets you access a specific set of windows, menus, set of books, reports, and data in an Oracle application. Several users can share the same responsibility, and a single user can have multiple responsibilities.

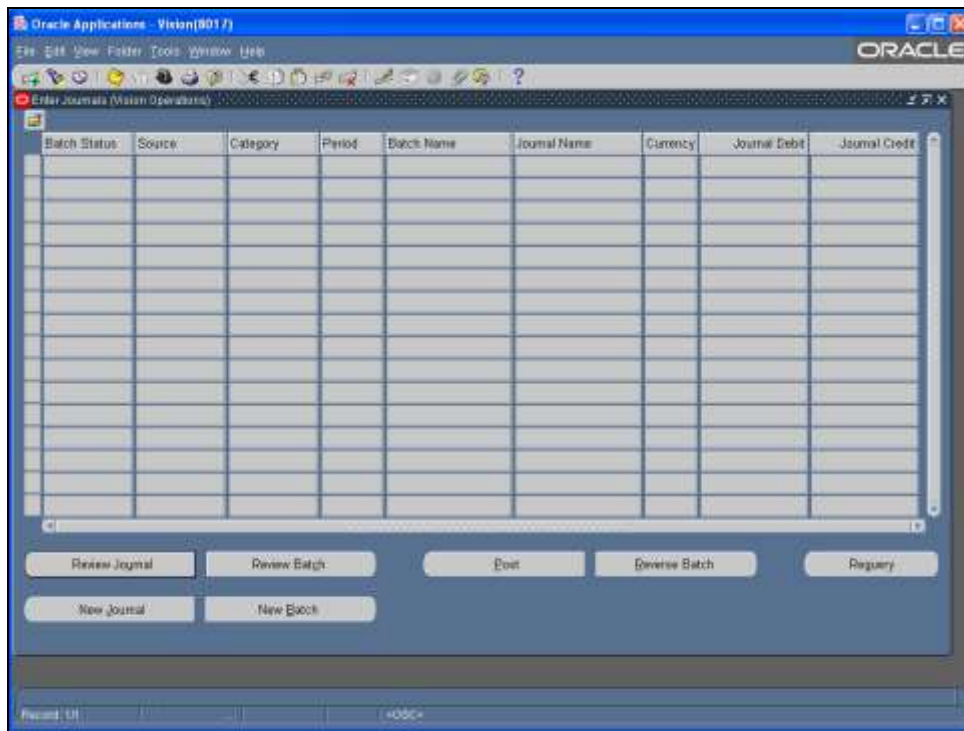
Step	Action
1.	This procedure can be performed in any Oracle responsibility. The GENERAL LEDGER SUPER USER responsibility is used in this lesson. To complete this procedure, navigate to a desired form.
2.	This lesson uses the ENTER JOURNALS form in the <i>General Ledger</i> module to demonstrate menus. The menu options vary based upon the form that is currently open.


Step	Action
3.	<p>To display a pulldown menu on the screen, click on the appropriate link in the MENU BAR.</p> <p>Click on FILE.</p>

 **There are multiple ways to open a menu. For each menu, you may select the menu and locate your selection by clicking on entries with your pointer or you may click once on the menu and then press a letter on your keyboard that is underlined in the menu. (For example, click once on the VIEW menu and then press F, which opens the Find window). In addition, you may press ALT + the underlined letter in each menu name (e.g., ALT-F for the FILE menu) and then press the letter of the command you wish to execute (e.g. ALT-F and then S activates the SAVE command). You may also click once on the menu and then use your arrow keys to locate your selection.**

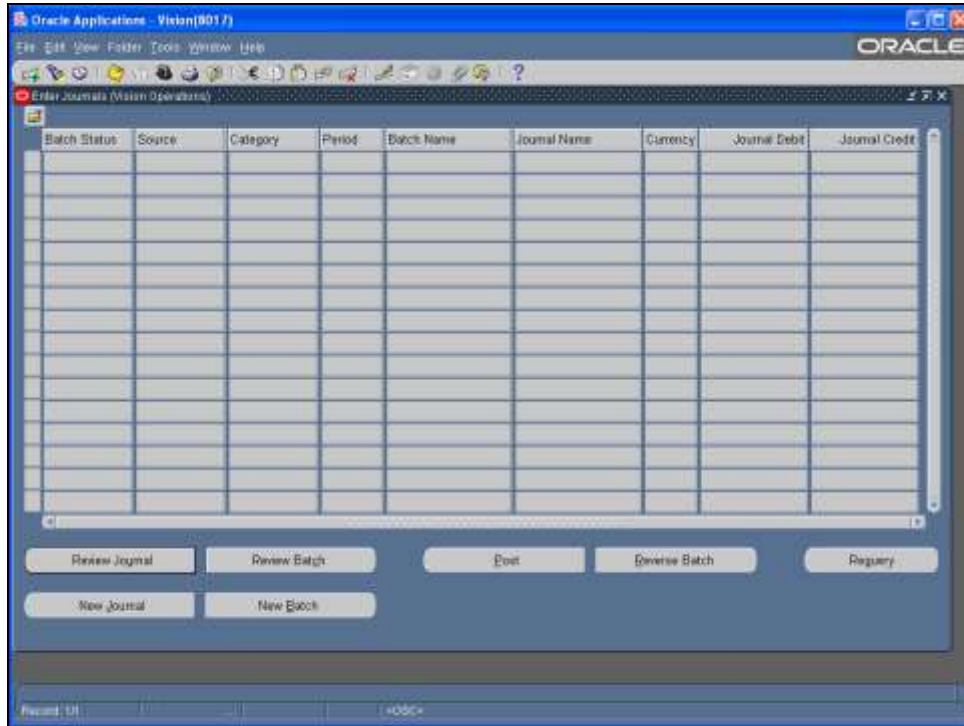
Step	Action
4.	<p>The options in the FILE menu display. Note that not all options are available. The available options are based on the displayed form.</p> <p>Select NEW to activate a new record in the current form.</p> <p>Select OPEN to open a selected <i>Navigator</i> menu option.</p>
5.	<p>Select SAVE to save the current record.</p> <p>Select SAVE AND PROCEED to save the current record and proceed to the next step in a process.</p> <p>Select NEXT STEP to proceed to the next step in the process.</p> <p>Select PLACE ON NAVIGATOR to place the form on the Documents tab of the <i>Navigator</i>.</p>
6.	<p>LOG ON AS A DIFFERENT USER is not used in Oracle 11i. If another user needs to log into the system from your computer, you must exit Oracle completely and then restart it to access the login window.</p> <p>Select SWITCH RESPONSIBILITY to change to another Oracle responsibility. This option is only active if you have more than one responsibility assigned to you. You can only switch responsibilities when the <i>Navigator</i> is the active window.</p>
7.	<p>Select PRINT to print a copy of the current form.</p>


Step	Action
8.	Select CLOSE FORM to close the open window and to return to the previous window. Select EXIT ORACLE APPLICATIONS to close out of Oracle entirely.




Step	Action
9.	The EDIT menu contains commands that allow you to manipulate the data on your forms. Click on the EDIT menu to display it on your screen. Select the menu item that allows you to copy data from one field or record to another field or record directly below it. 
10.	Select UNDO TYPING to remove the most recent entry.

Step	Action
11.	<p>Select CUT to remove the selected data from a field, allowing you to paste the data you cut into other fields.</p> <p>Select COPY to copy the data in one field, allowing you to paste that same data into other fields without removing the original data.</p> <p>Select PASTE to paste the data you either copied using the COPY command or cut using the CUT command into a new field.</p> <p>Selecting DUPLICATE allows you to copy the data from one field or record to another field or record directly below it.</p>
12.	<p>CLEAR contains four functions:</p> <p>Select CLEAR > RECORD to clear the data from a part of the form so you can begin entering new data into the record. CLEAR RECORD does NOT delete the data from the database. It clears a section of the form so you may enter new data.</p> <p>CLEAR > FIELD clears the data from one specified field.</p> <p>CLEAR > BLOCK clears the data from a specified region.</p> <p>Select CLEAR > FORM to clear all data from the form so you may begin entering new data in the form. Clearing a form does not delete the data from the database.</p> <p>Selecting DELETE permanently removes the data in a specified form or record from the database. You must save after selecting DELETE to permanently delete the data from the database.</p>
13.	<p>Use SELECT ALL to select all records in a form.</p> <p>Use DESELECT ALL to deselect all selected records in a form.</p>
14.	<p>Select EDIT FIELD to activate a field, allowing you to enter data.</p> <p>The PREFERENCES menu item contains a sub-menu that allows you to change your profile options and your password.</p>




Step	Action
15.	Use the VIEW menu to perform searches. Click on the VIEW menu to display it on your screen. 
16.	Select SHOW NAVIGATOR to return to the <i>Navigator</i> window without closing the current form.


 **Zoom** allows the addition of user-invoked logic on a per-block basis. Most Zooms that were predefined in the character-mode Oracle Applications Release 10 and earlier are now incorporated into Oracle Applications forms as buttons or windows for Release 11 and later, therefore the menu entry and button on the toolbar are disabled unless Zoom logic has been defined in the CUSTOM library for that form. Please see your System Administrator for more information.

Step	Action
17.	Use FIND to open a new window to search for records. FIND is detailed in a separate tutorial. Selecting QUERY BY EXAMPLE allows you to perform a detailed search for information. QUERY BY EXAMPLE is detailed in a separate tutorial.

Step	Action
18.	Clicking on RECORD opens a sub-menu. Use the RECORD sub-menu to navigate to the first or last record when many records are queried.
19.	Select ATTACHMENTS to attach other documents to the record displayed in this form.



Translation is a process that allows you to restate your functional currency account balances into a reporting currency. Oracle General Ledger multiplies the average, periodic, or historical rate you define by your functional currency account balances to perform foreign currency translation. General Ledger translates foreign currency in accordance with FASB 52 (U.S.). General Ledger also remeasures foreign currencies for companies in highly inflationary economies, in accordance with FASB 8 (U.S.).

Step	Action
20.	Use REQUESTS to navigate to the Requests window after you have run a report or process.
21.	The FOLDER menu contains options specific to folders, which are detailed in a separate tutorial.
22.	The TOOLS menu varies depending on which form you are using. In this lesson, the TOOLS menu contains functions specific to the Enter Journals form.
23.	The WINDOW menu allows you to modify your view of the windows. Click on the WINDOW menu to display it on your screen. 
24.	The default view is CASCADE. Clicking on CASCADE resizes your windows to Oracle's standard size. Selecting TILE HORIZONTALLY allows you to view your windows in a horizontal fashion. Selecting TILE VERTICALLY allows you to view your windows in a vertical fashion.
25.	Each of your open windows is displayed at the bottom of the WINDOW menu.
26.	The HELP menu offers several types of help and is detailed in a separate tutorial.
27.	In this lesson, you learned how to view menu items and their corresponding functions and processes. End of Procedure.

17 Export a Report to Excel

Procedure

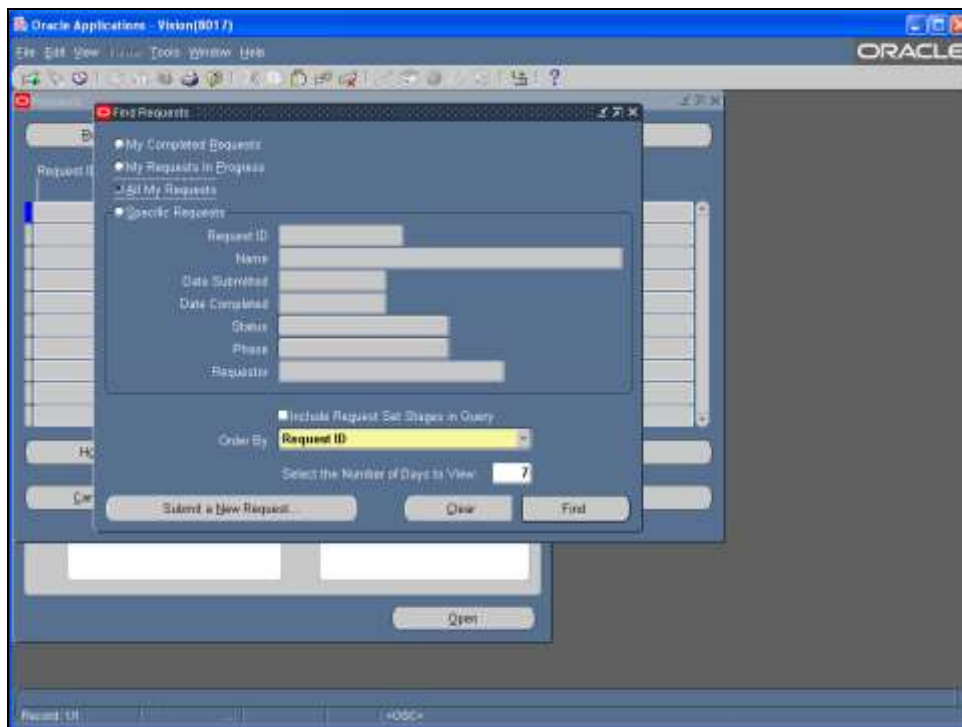
Description:

A report can be exported from the *Requests* window into Excel. This will enable you to manipulate the data in the report with standard Excel functionality.

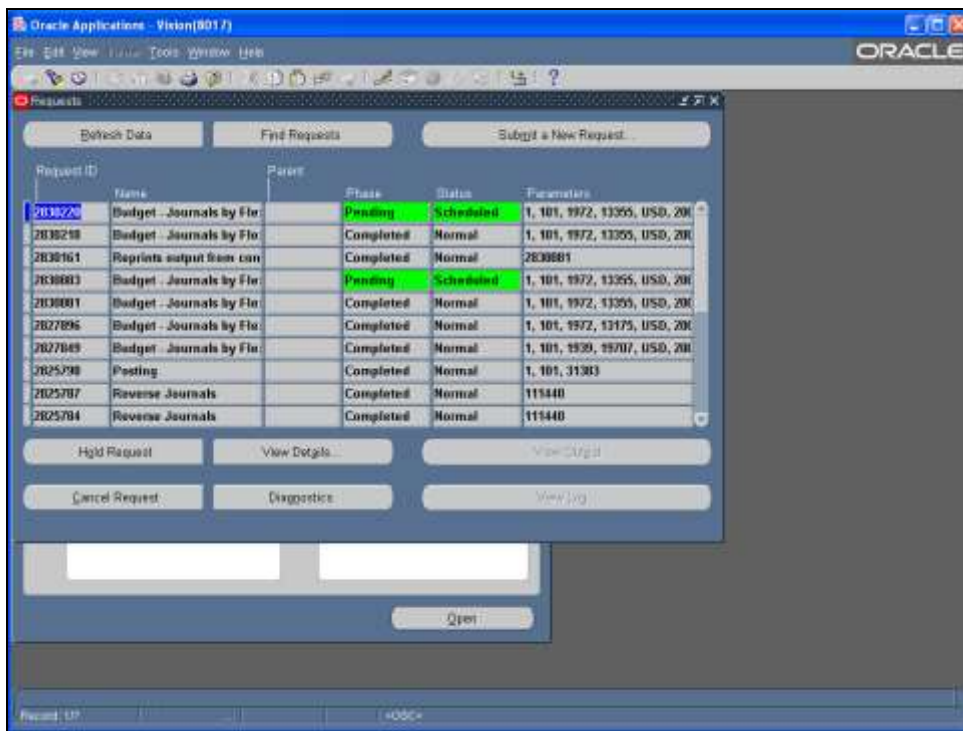
Oracle Prerequisites:

- A report must have completed normally.

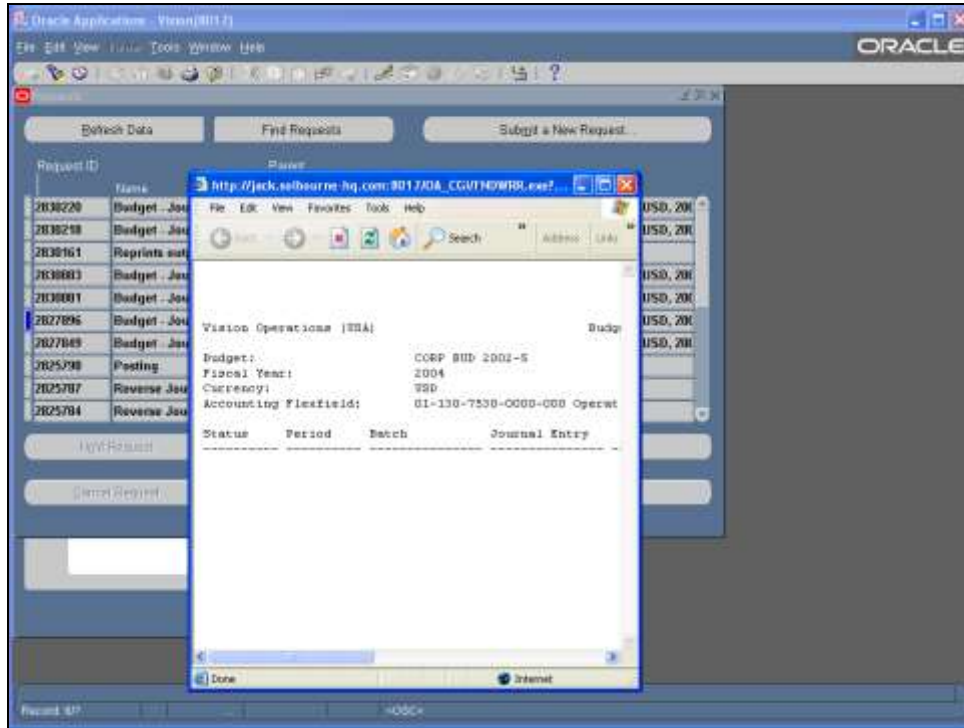
Step	Action
1.	<p>Select one of your organization's GENERAL LEDGER responsibilities. This lesson uses the Oracle GENERAL LEDGER SUPER USER responsibility.</p> <p>You will also need a version of Excel software compatible with the Oracle version you are using.</p> <p>To complete this procedure, follow the menu path: VIEW > REQUESTS.</p>



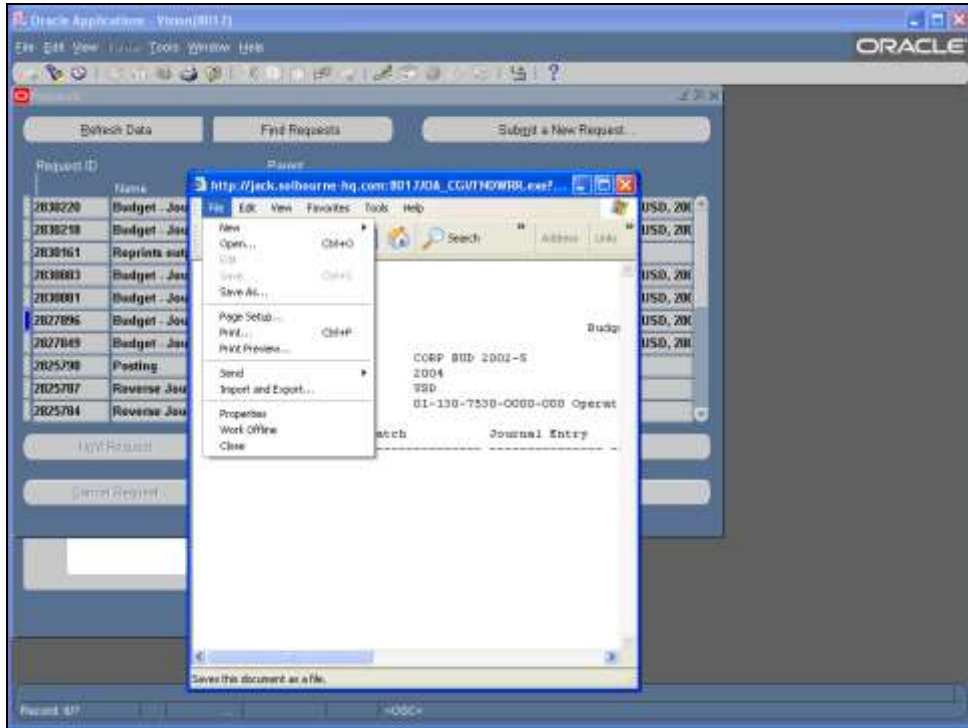
Step	Action
2.	<p>The Find Requests window displays enabling you to set search options. The ALL MY REQUESTS radio button defaults as selected.</p> <p>To search for a specific request, select the SPECIFIC REQUESTS radio button and complete any of the search fields in that region. This lesson searches for all requests.</p> <p>Click on FIND.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">Find</div>



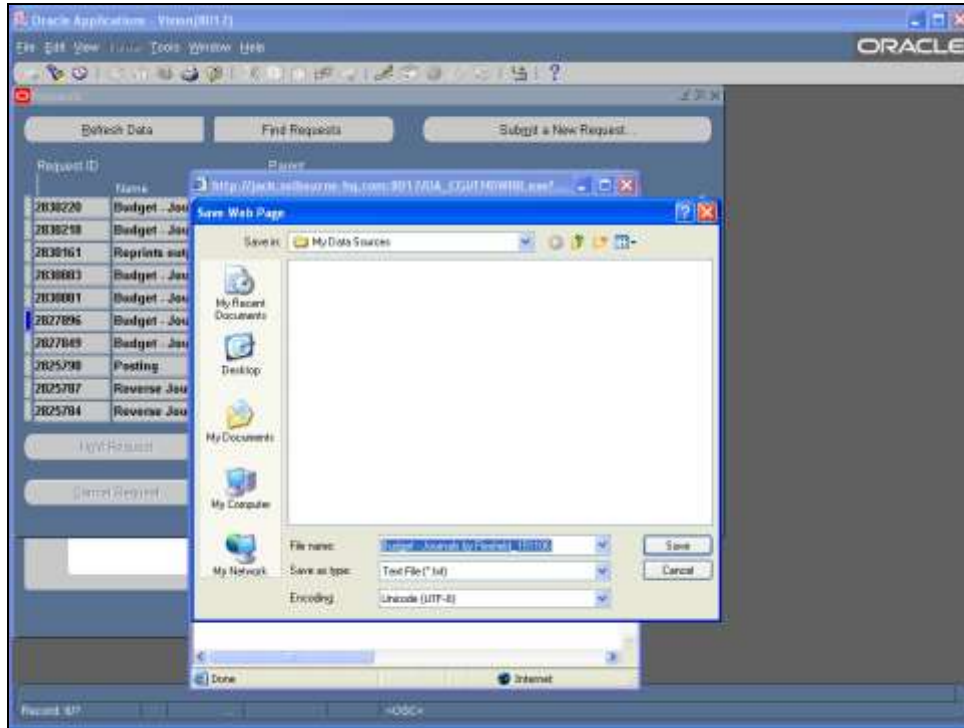
Step	Action
3.	<p>Requests based on your search criteria display. Select the request you would like to export by clicking anywhere in that line.</p> <p>Click on the request with 2827849 as the REQUEST ID.</p>
4.	<p>Click on VIEW OUTPUT.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">View Output</div>

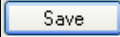




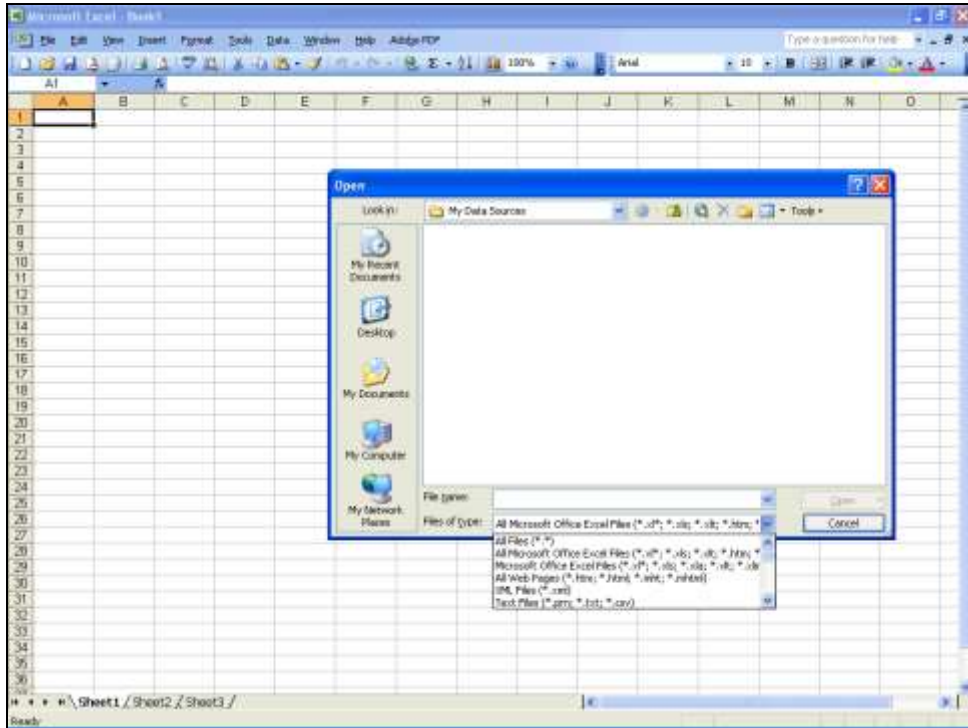
Step	Action
5.	The report displays in a browser window. If the report displays in an Oracle window, follow the menu path TOOLS > COPY FILE to display the report in a browser window.

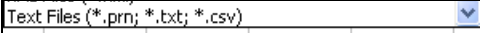
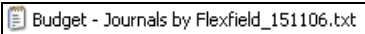


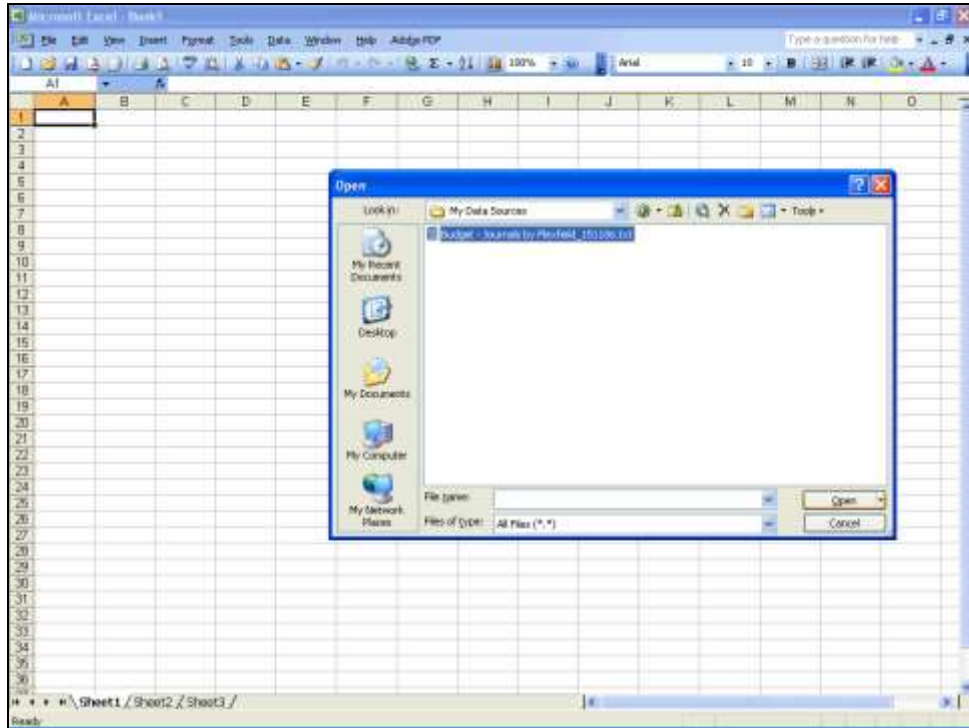
Step	Action
6.	<p>The next step is to save the file as a text file. Follow the menu path FILE > SAVE AS.</p> <p>Click on SAVE AS...</p> <div style="border: 1px solid black; padding: 2px; width: fit-content;">Save As...</div>

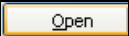


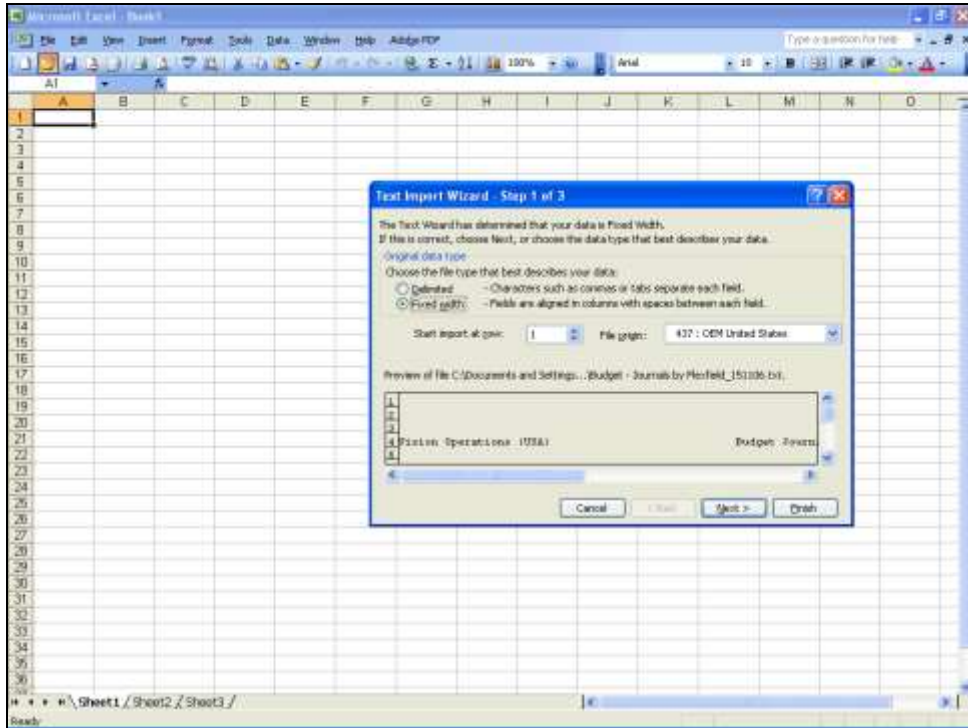
Step	Action
7.	<p>A window displays enabling you to save the file. Select the location in which to save the file. Rename the file or accept the default name.</p> <p>TEXT FILE defaults. Do not change this type. Saving the file as a text file allows you to parse the columns after the file is opened in Excel.</p> <p>Click on SAVE.</p> 
8.	<p>Close the browser window.</p> <p>Click on X Close Window.</p> 
9.	<p>The file you saved in Oracle must be opened from within Excel. Open Microsoft Excel.</p>
10.	<p>Click on the OPEN icon in the toolbar.</p> 



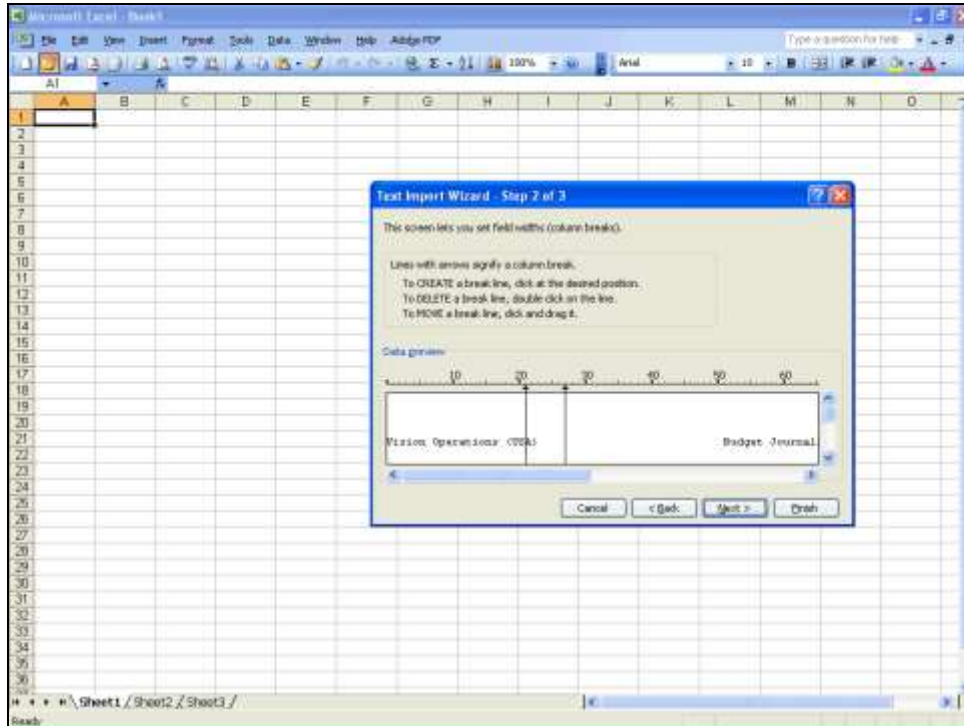
Step	Action
11.	<p>Select the location where you saved the text file using the pull down menu.</p> <p>You will not be able to find your file unless you select ALL FILES or TEXT FILES from the FILES OF TYPE drop-down menu. Select TEXT FILES (*.pm; *.txt; *.csv) from the drop down menu.</p> <p>Click on TEXT FILES (*.pm; *.txt; *.csv) from the drop down menu.</p> 
12.	<p>Select the text file.</p> <p>Click on the file BUDGET - JOURNALS BY FLEXFIELD_151106.TXT.</p> 



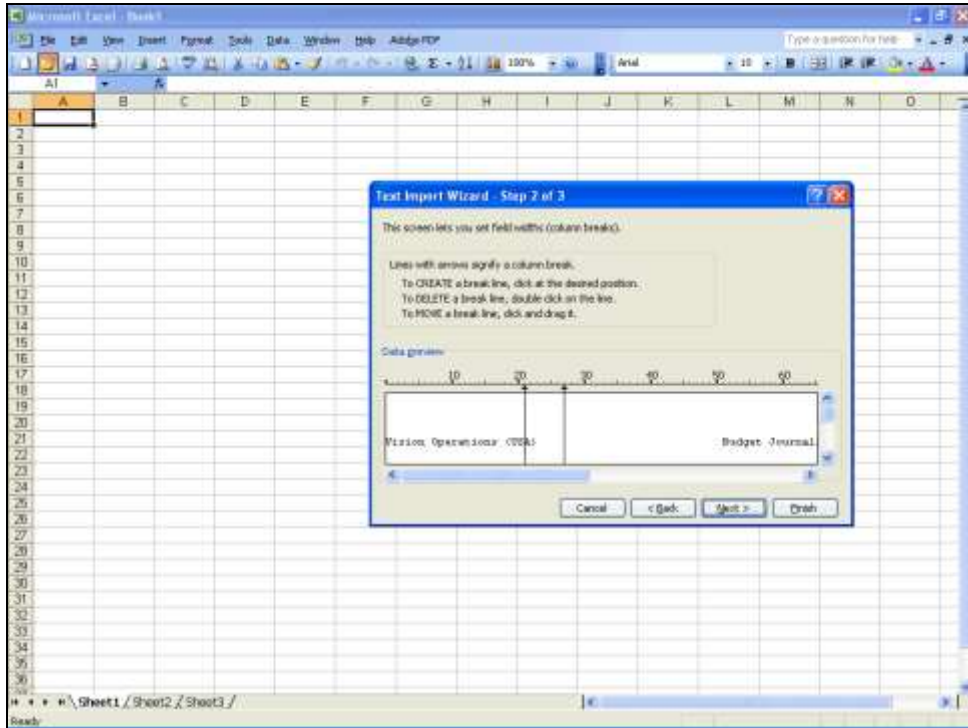
Step	Action
13.	Click on OPEN . 



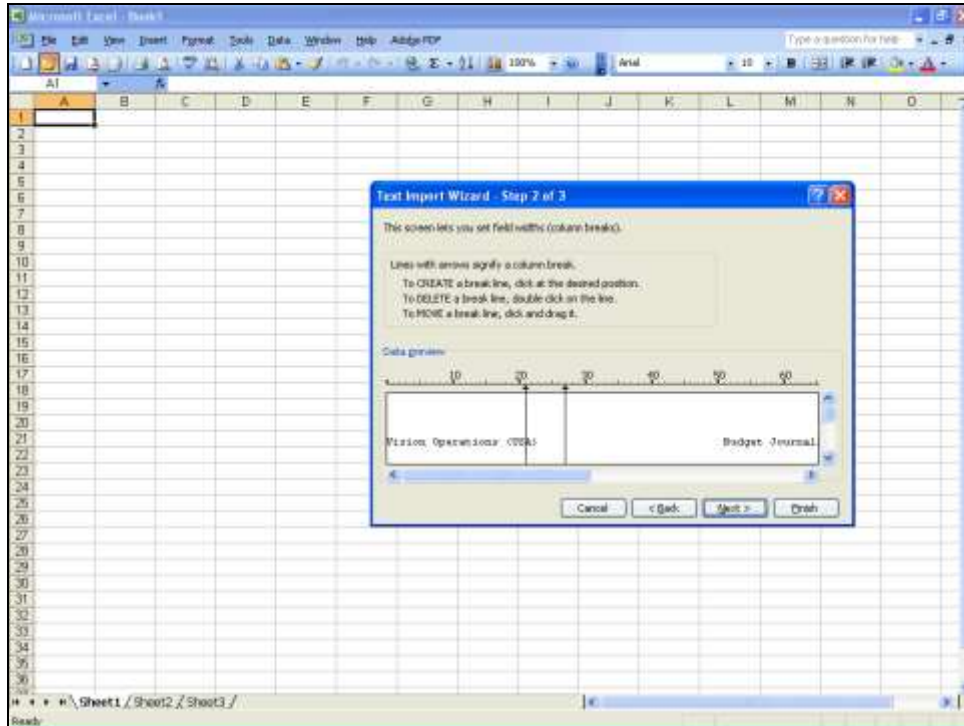
Step	Action
14.	<p>The Text Import Wizard window opens, enabling you to set up the columns. Accept the default selection of FIXED WIDTH.</p> <p>Click on NEXT>.</p> <div data-bbox="370 1192 488 1234" style="border: 1px solid black; padding: 2px; display: inline-block;">Next ></div>



Step	Action
15.	<p>The Data Preview region displays the data that will appear in the spreadsheet. Column breaks have been inserted automatically, but may not be in the proper locations.</p> <p>Use the scroll bar to scroll down to the headings to set the column widths properly.</p>



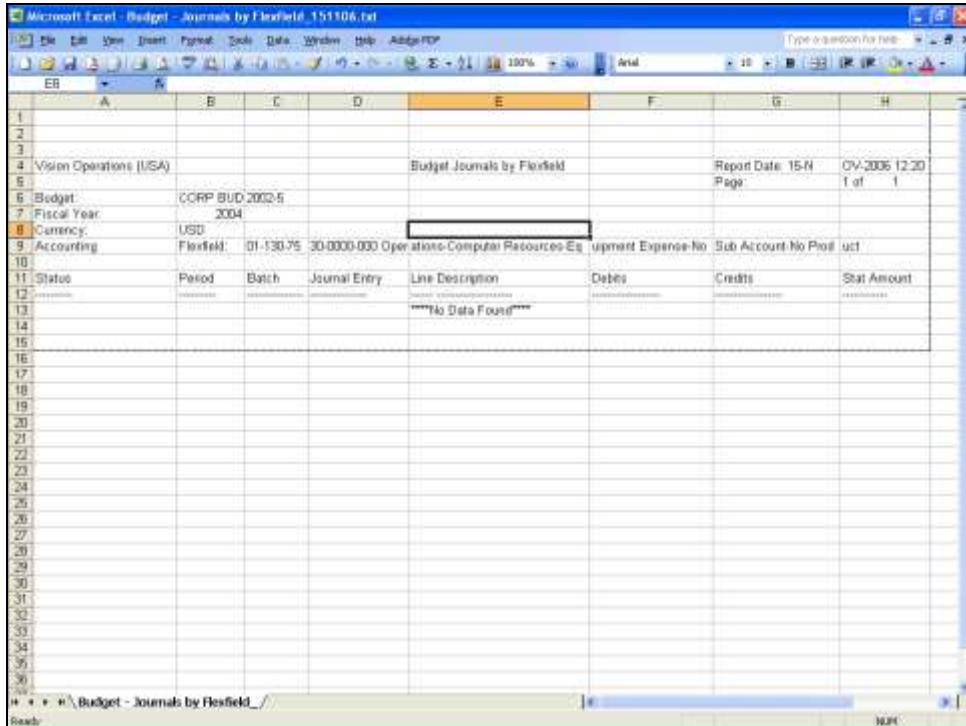
Step	Action
16.	<p>The lines with the arrows on top denote a column break. To add a column break, click once. To delete a column break, double-click on the line. To move the column break, click and drag the line to its new location.</p> <p>The column breaks should be set at the end of each column. Use the heading underscores to determine where to place the column breaks.</p>



Step	Action
17.	<p>Scroll to the right to set the remaining column breaks. After all of the column breaks have been inserted or adjusted, click on FINISH.</p> <p>Click on FINISH.</p> <div data-bbox="464 1192 574 1230" style="border: 1px solid black; padding: 2px; display: inline-block;">Finish</div>



Click on NEXT to set the date format for each column.



Step	Action
18.	The file is displayed in Microsoft Excel with properly parsed columns. Use standard Excel functionality to manipulate the data.
19.	In this lesson, you learned how to export a report to Excel. End of Procedure.

18 Create and Use Folders

Procedure

Description:

Folders are used to create a custom view of report, summary, or input windows. For report and summary windows, you display only the **fields** you want to view or export. For input windows, you move or group fields for more efficient data entry. To remove a field from a window, you hide the field rather than delete it. In other words, you change the view, not the data. For report and summary windows, you can make a **query** part of your folder function.

It is recommended that you query a **record** in the **form** in which you will create a folder. If no data displays in your form and you select certain fields to modify their views, Oracle displays an error message stating that data is required in that field. If a record is queried

before you begin creating or modifying your folder, you will not receive these error messages. Refer to Search for Data for information on querying a record.

Oracle Prerequisites:

- The window must allow folders.
- A query should have been run to populate the window with data.



A **field** is a position on a window used to enter, view, update, or delete information. A field prompt describes each field by telling what kind of information appears in the field, or alternatively, what kind of information can be entered in the field.



A **query** is a search for applications information that you initiate using an Oracle Applications window.



A **record** is one occurrence of data stored in all the fields of a block. A record is also referred to as a row or a transaction, since one record corresponds to one row of data in a database table or one database transaction.



A **form** is a box around a set of related information on your screen. Many windows can appear on your screen simultaneously and can overlap or appear adjacent to each other. Windows can also appear embedded in other windows. You can move a window to a different location on your screen.


Step	Action
1.	<p>This procedure can be performed in any responsibility that allows folders. The GENERAL LEDGER SUPER USER responsibility is used in this lesson.</p> <p>To complete this procedure, navigate to a desired form.</p>

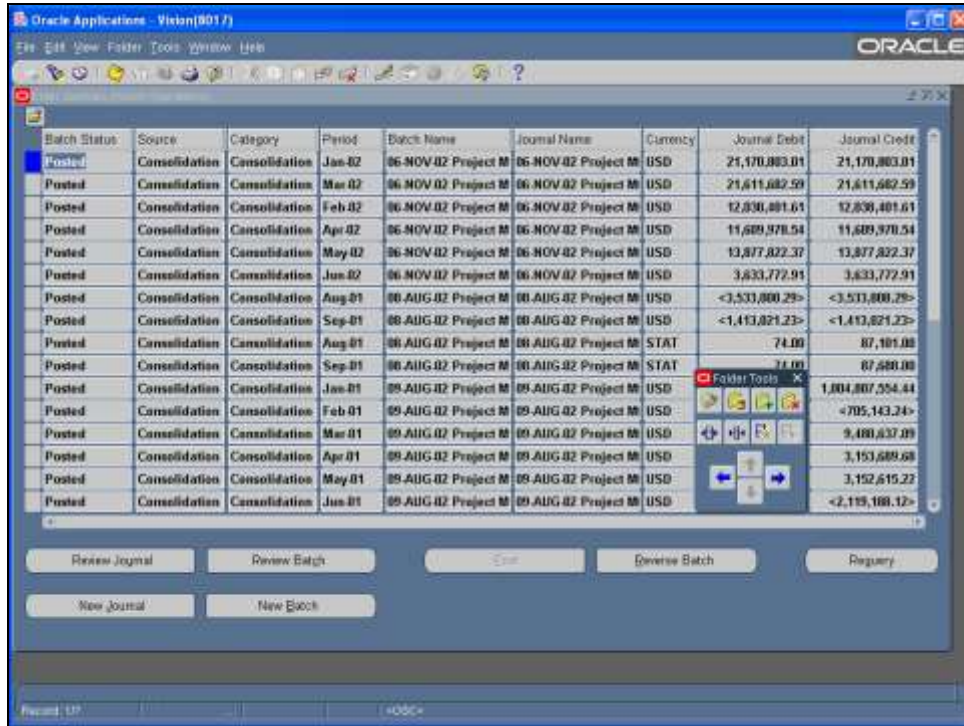



A **responsibility** is a level of authority set up by your system administrator in Oracle Applications. It lets you access a specific set of windows, menus, set of books, reports, and data in an Oracle application. Several users can share the same responsibility, and a single user can have multiple responsibilities.




Batch Status	Source	Category	Period	Batch Name	Journal Name	Currency	Journal Debit	Journal Credit
Posted	Consolidation	Consolidation	Jan-02	06-NOV-02 Project M	06-NOV-02 Project M	USD	21,170,803.01	21,170,803.01
Posted	Consolidation	Consolidation	Mar-02	06-NOV-02 Project M	06-NOV-02 Project M	USD	21,611,682.59	21,611,682.59
Posted	Consolidation	Consolidation	Feb-02	06-NOV-02 Project M	06-NOV-02 Project M	USD	12,830,481.61	12,830,481.61
Posted	Consolidation	Consolidation	Apr-02	06-NOV-02 Project M	06-NOV-02 Project M	USD	11,689,970.54	11,689,970.54
Posted	Consolidation	Consolidation	May-02	06-NOV-02 Project M	06-NOV-02 Project M	USD	13,877,822.37	13,877,822.37
Posted	Consolidation	Consolidation	Jun-02	06-NOV-02 Project M	06-NOV-02 Project M	USD	3,633,772.91	3,633,772.91
Posted	Consolidation	Consolidation	Aug-01	00-AUG-02 Project M	00-AUG-02 Project M	USD	<3,531,800.29>	<3,531,800.29>
Posted	Consolidation	Consolidation	Sep-01	00-AUG-02 Project M	00-AUG-02 Project M	USD	<1,413,821.23>	<1,413,821.23>
Posted	Consolidation	Consolidation	Aug-01	00-AUG-02 Project M	00-AUG-02 Project M	STAT	74.00	87,101.00
Posted	Consolidation	Consolidation	Sep-01	00-AUG-02 Project M	00-AUG-02 Project M	STAT	74.00	87,680.00
Posted	Consolidation	Consolidation	Jan-01	00-AUG-02 Project M	00-AUG-02 Project M	USD	1,804,807,554.44	1,804,807,554.44
Posted	Consolidation	Consolidation	Feb-01	00-AUG-02 Project M	00-AUG-02 Project M	USD	<705,143.24>	<705,143.24>
Posted	Consolidation	Consolidation	Mar-01	00-AUG-02 Project M	00-AUG-02 Project M	USD	9,480,637.09	9,480,637.09
Posted	Consolidation	Consolidation	Apr-01	00-AUG-02 Project M	00-AUG-02 Project M	USD	3,153,689.68	3,153,689.68
Posted	Consolidation	Consolidation	May-01	00-AUG-02 Project M	00-AUG-02 Project M	USD	3,152,615.22	3,152,615.22
Posted	Consolidation	Consolidation	Jun-01	00-AUG-02 Project M	00-AUG-02 Project M	USD	<2,119,188.12>	<2,119,188.12>

Step	Action
2.	<p>If folders are enabled for a form, the FOLDER icon in the upper left corner of the form displays. In addition, the FOLDER menu and the FOLDER TOOLS icon in the toolbar are both active.</p> <p>A query has been run to ensure that the folder can be created and modified without Oracle asking for data.</p> <p>Click on the FOLDER TOOLS icon in the toolbar to activate the <i>Folder Tools</i> toolbar.</p> 
3.	<p>You may want to drag the toolbar to the right so that it does not hide information in your window.</p>





Step	Action
4.	<p>It is a good practice to save the Oracle default folder view as a folder; e.g., Enter Journals Default View. This allows you to revert to the default folder using the OPEN FOLDER icon. Otherwise, you have to close back to the <i>Navigator</i> and reopen the form to obtain the default view.</p> <p>Click on the SAVE icon in the <i>Folder Tools</i> toolbar.</p> 

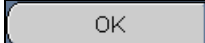
 **The SAVE icon in the main toolbar will not save your folder display. That icon saves the data in your form. To save your folder display, you must always select the SAVE icon in the Folder Tools toolbar or follow the menu path FOLDER > SAVE.**



Step	Action
5.	Use this window to save your default folder. Enter a descriptive folder name. Type Enter Journals Default View in the FOLDER field.
6.	Select ALWAYS if you want the query associated with the folder to run every time you open the folder.
7.	Select NEVER if you do not want the query to run when you open the folder. The data will be controlled by your entries in the Find window. The folder will only change the way you view the data.
8.	Select ASK EACH TIME if you want to have the option to run the query without running the query automatically.
9.	Select OPEN AS DEFAULT if you want this folder view to be the one you see each time you open the form.
10.	Select PUBLIC if you want others to be able to use your folder view. Users will be able to use the folder but not change or delete it.
11.	Deselect this option if you want the original query to be excluded from the folder. After you exclude the query, you cannot add it back. Click on SHOW QUERY if you wish to view the query that was used to create the folder.

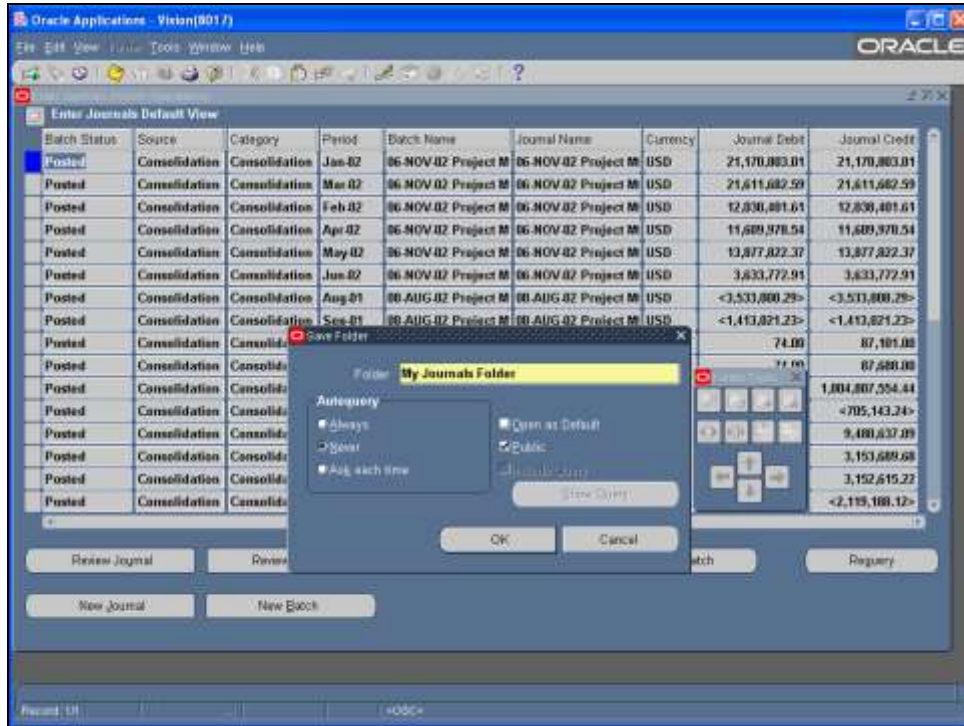
Step	Action
12.	For this lesson, select the NEVER option in the AUTOQUERY field. Click on the Radio Button to select NEVER. 
13.	Next, select PUBLIC to allow others to use your folder view. Click on the Checkbox to select PUBLIC. 




Step	Action
14.	Click on OK to save your default folder. 
15.	The default folder name now displays next to the FOLDER icon. Next, create a new folder.



Step	Action
16.	<p>Follow the menu path FOLDER > NEW or click on the NEW icon in the <i>Folder Tools</i> toolbar.</p> <p>Click on NEW...</p>
17.	<p>Note that your options for creating a new folder are the same as the options for saving an existing folder. Name the new folder.</p> <p>Type My Journals Folder in the FOLDER field.</p>




Step	Action
18.	Click on OK . 
19.	Your new folder displays. You can now modify the display of this folder. The next section of this lesson provides information on the <i>Folder Tools</i> toolbar options.



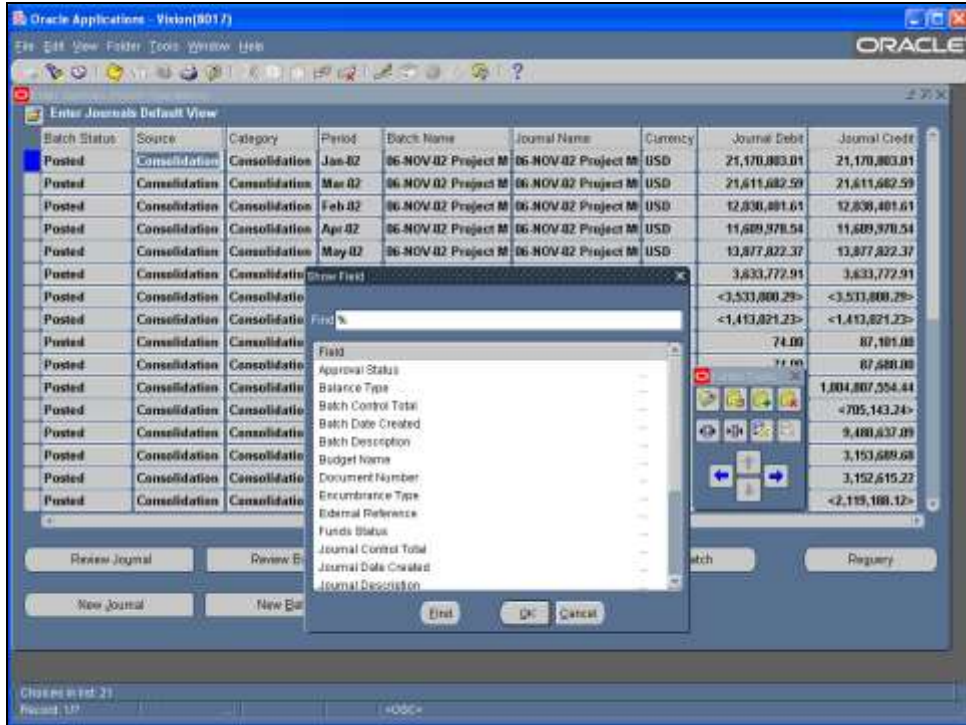
Step	Action
20.	All of the functions available on the toolbar are also available in the FOLDER menu. The FOLDER menu includes several additional functions. To open an existing folder, click on the OPEN FOLDER icon.
21.	To save a folder, click on the SAVE FOLDER icon. The icon on the <i>Oracle</i> toolbar will not save a folder. You must use the <i>Folder Tools</i> toolbar or follow the menu path FOLDER > SAVE.
22.	To create a new folder, click on the NEW FOLDER icon. To remove a folder, click on the DELETE FOLDER icon.
23.	To increase the width of a column, click on the WIDEN FIELD icon. To decrease the width of a column, click on the SHRINK FIELD icon.
24.	To add a new column to the folder, click on the SHOW FIELD icon. To remove a column from the folder, click on the HIDE FIELD icon.
25.	To move a column to the left, place your cursor in the column and click on the MOVE LEFT icon. Use the UP and DOWN arrows to move fields up or down, if available.


Step	Action
26.	To move a column to the right, place your cursor in the column and click on the MOVE RIGHT icon. Use the UP and DOWN arrows to move fields up or down, if available.



Step	Action
27.	Sometimes, fields are hidden by default in Oracle. Use the SHOW FIELD option to display those fields in your folder. Begin by clicking in a field. The field you display will display to the right of your selected field. Click in the SOURCE field. Consolidation
28.	Use the Folder Tools toolbar to show you list of hidden fields associated with the open form. Click on the SHOW FIELD icon in the <i>Folder Tools</i> toolbar. 

 You can also follow the menu path **FOLDER > SHOW FIELD**.



Step	Action
29.	Select the field you want to add. Use the scroll bar if necessary. Click on Approval Status .
30.	Click on OK . 




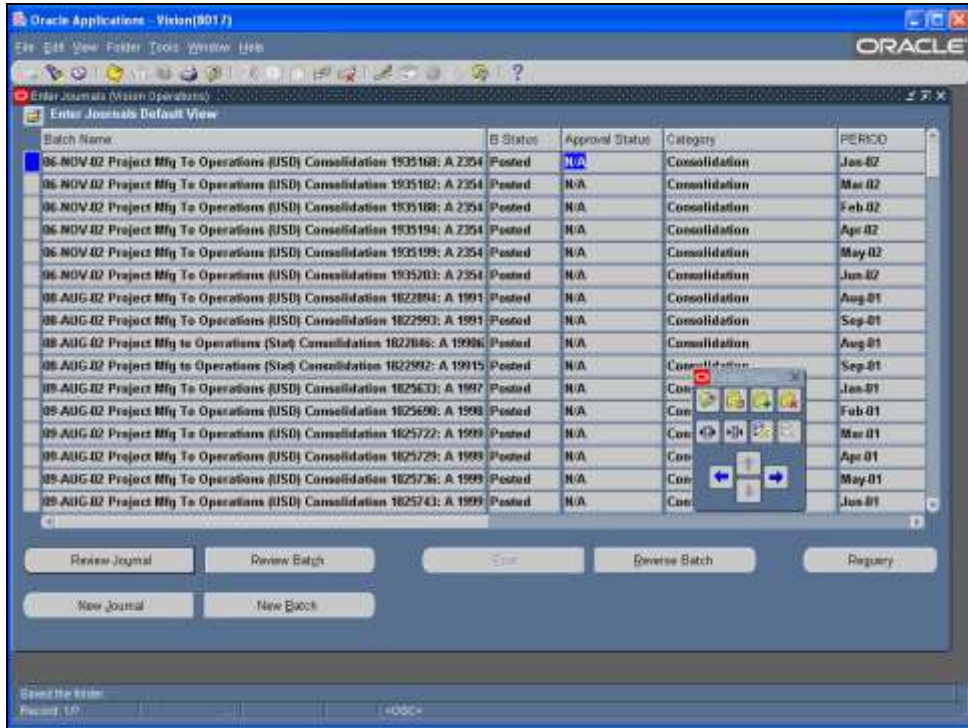
Step	Action
31.	<p>The added field (APPROVAL STATUS in this lesson) displays to the right of the originally selected field.</p> <p>You can hide fields by clicking in the field to be hidden and then clicking on the HIDE FIELD icon in the Folder Tools toolbar. Hidden fields are removed from the screen and placed in the Show Field list. You can display hidden fields at any time by clicking on the SHOW FIELD icon in the Folder Tools toolbar.</p>




Step	Action
32.	Some options are only available in the FOLDER menu. These options are SAVE AS, CHANGE PROMPT, AUTOSIZE ALL, and QUERY options.
33.	Click on SAVE AS to save your folder under a new name. You can also use this option to change the query or view options you selected when you created your folder.
34.	Click on CHANGE PROMPT to change the name of a field. Click on AUTOSIZE ALL to resize all of your fields.
35.	Click on the QUERY options to view or reset your query options. Note that the RESET option does not allow you to choose a new query option – Oracle resets your query to the default query. Use the SAVE AS option to choose a new query option.
36.	In this lesson, the following changes were made: <ol style="list-style-type: none"> The BATCH STATUS field has been renamed to B STATUS and the PERIOD field's name was entered in ALL CAPS (FOLDER > CHANGE PROMPT). The BATCH NAME field was moved to the leftmost column (MOVE LEFT icon) and widened (WIDEN FIELD icon). The SOURCE field was hidden (HIDE FIELD icon).



Step	Action
37.	To save these changes, use the SAVE icon in the <i>Folder Tools</i> toolbar. Click on SAVE . 
38.	A message displays at the bottom of the screen to let you know your folder was saved.



Step	Action
39.	<p>Another way to verify that your folder has been saved is to select the OPEN FOLDER icon.</p> <p>Click on the OPEN FOLDER icon.</p> 



Step	Action
40.	<p>Notice that the two folders saved (ENTER JOURNALS DEFAULT VIEW and MY JOURNALS FOLDER) display. In addition, other public folders created by other users also display.</p> <p>If you would like to delete your folder, follow the menu path FOLDER > DELETE or click on the DELETE icon in the Folder Tools toolbar. A window similar to the window above opens listing all folders available for you to delete. You can only delete folders that you have created.</p>
41.	<p>In this lesson, you learned how to create and use folders. End of Procedure.</p>

19 Toolbar and Hot Key Combinations

Procedure


Description:

A toolbar is a collection of icons representing commonly-used functions. In addition, various toolbar and menu options have keyboard shortcuts, called “hot keys,” associated with them, providing you with alternatives to using the toolbar and menus.

This lesson describes many of the common toolbar icons and hot key combinations.


Oracle Prerequisites:

- You must have access to at least one Oracle **responsibility**.



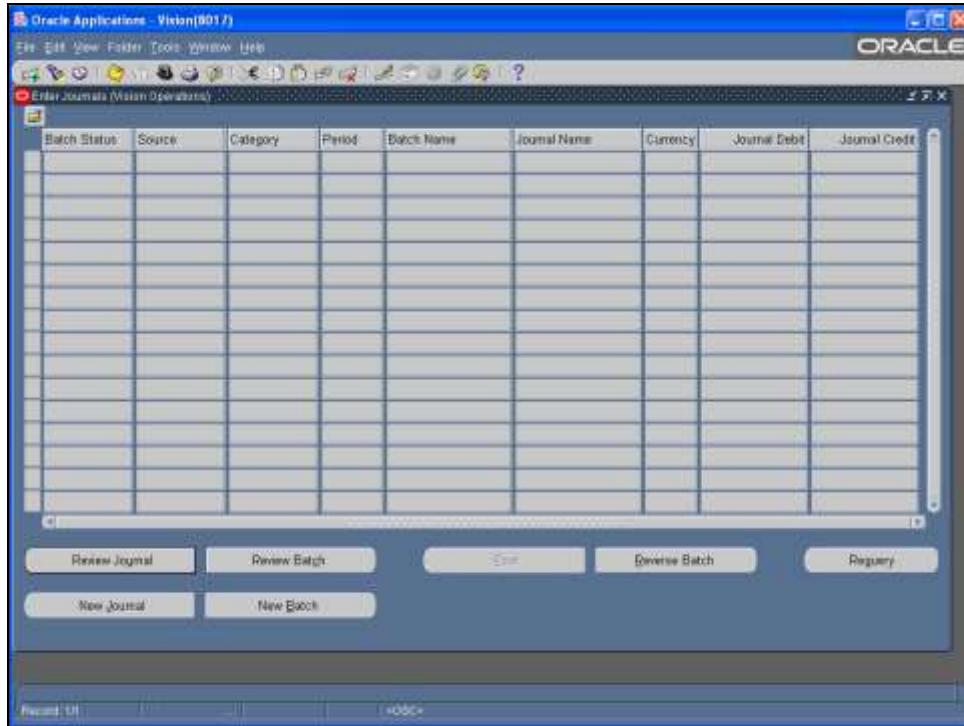
A responsibility is a level of authority set up by your system administrator in Oracle Applications. It lets you access a specific set of windows, menus, set of books, reports, and data in an Oracle application. Several users can share the same responsibility, and a single user can have multiple responsibilities.




Step	Action
1.	This procedure can be performed in any Oracle responsibility. The GENERAL LEDGER SUPER USER responsibility is used in this lesson. To complete this procedure, navigate to a desired form.




A form is a box around a set of related information on your screen. Many windows can appear on your screen simultaneously and can overlap or appear adjacent to each other. Windows can also appear embedded in other windows. You can move a window to a different location on your screen.

Step	Action
2.	This lesson uses the ENTER JOURNALS form in the <i>General Ledger</i> module to demonstrate the toolbar and hot key shortcuts. These options vary based upon the form that is currently open.
3.	Positioning your cursor over an icon on the toolbar displays the tooltip for that icon as shown here. Moving the cursor off the icon hides the tooltip.
4.	The NEW icon is the same as the NEW command in the FILE menu. It activates a new record.



Step	Action
5.	<p>The FIND icon opens a Find window to perform a search for data. This command is also located in the EDIT menu. A Find window is not available in every form.</p> <p>Click on the FIND icon to display the Find window.</p> 
6.	<p>The FIND window displays. Close this window using the X button at the top right corner of the window.</p> <p>Click the X Close Form button.</p> 
7.	<p>The SHOW NAVIGATOR icon displays the Navigator window without closing your current form. This command is located in the VIEW menu.</p>
8.	<p>The SWITCH RESPONSIBILITY icon allows you to change responsibilities. This icon is only available when the Navigator is the active window.</p>
9.	<p>The PRINT icon is used to print a copy of the current page.</p>
10.	<p>The CLOSE FORM icon closes all of your open forms and returns you to the Navigator. There are currently two open forms: ENTER JOURNALS and FIND JOURNALS.</p> <p>Click on the CLOSE FORM icon to close all of the open forms.</p> 
11.	<p>Both forms closed and you are returned to the Navigator window.</p>

Step	Action
12.	The CUT, COPY, and PASTE icons are used to copy or move data in a form.
13.	The icon on the left is the CLEAR RECORD icon and one on the right is the DELETE RECORD icon. They remove the data from a field or record. CLEAR RECORD does not permanently remove the data from the database.
14.	<p>Selecting the EDIT FIELD opens a Field Editor window. In some cases, you can edit the data in the field using this icon.</p> <p>Click on the EDIT FIELD icon to open the Field Editor window.</p> 
15.	<p>The <i>Field Editor</i> window opens. To close this window, use either the X in the upper right corner of the window or select the CANCEL button located near the bottom center of the window.</p> <p>Click the X Close Form button.</p>
16.	The ATTACHMENTS icon is used in some forms to attach other documents or text to a form. When attachments have been added, this icon changes to display a paper clip holding a yellow slip of paper. This feature is not available in all forms.
17.	The FOLDER TOOLS icon opens the Folder Tools toolbar. This feature is detailed in another tutorial.
18.	The HELP icon opens an online help window. This feature is detailed in another tutorial.
19.	<p>Many of the toolbar icons and menu items can also be accessed through hot key combinations using your keyboard. To access a list of the most common hot key combinations click the CTRL key and the K key at the same time.</p> <p>Press [CTRL] + [K] to access the Keys window.</p>
20.	<p>The <i>Keys</i> window opens. Use the scroll bars to view the available hot key combinations. When you locate the combination you are looking for, click on the OK button to close the window.</p> <p>Click on OK to close the <i>Keys</i> window.</p>
21.	<p>In this lesson, you learned many of the common toolbar icons and hot key combinations.</p> <p>End of Procedure.</p>