

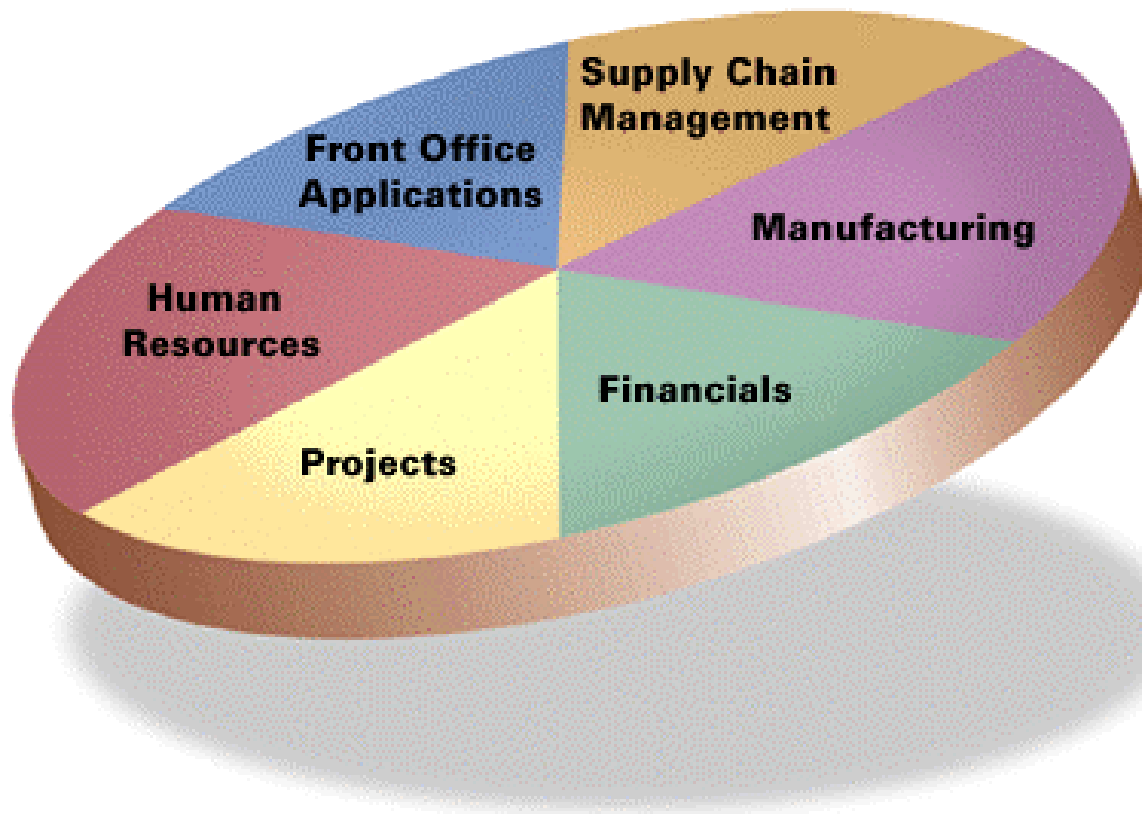


Spider Systems

Oracle Applications: Navigation and Related Concepts



Oracle Applications





Course Objectives

- **After this course, you should be able to:**
 - Logon and off of Oracle Applications
 - Use forms and menus
 - Enter data using forms
 - Search for data using forms
 - Run and monitor reports and programs
 - Identify and use the two types of flexfields
 - Request Processing
 - Set personal user profile options



Starting Oracle Application

- **Starting Oracle Applications**
- **To start Oracle Applications, you need to:**
 - Start up your computer system
 - Start your Web Browser
 - Start the Oracle Applications program
 - Log on to Oracle Applications
 - Choose a responsibility (if necessary)
 - Navigate to an application window



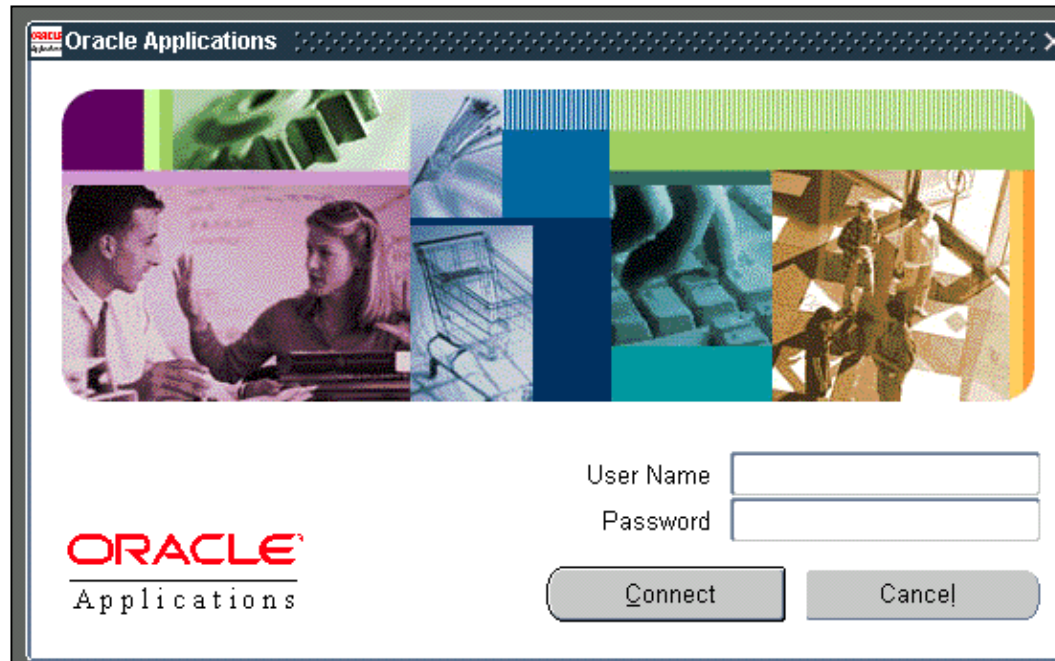
Sign-on

- **You need an Oracle Applications username and password, also known as an Oracle Applications sign-on, to log on to Oracle Applications.**
- **It is different from the username and password you use to log on to your computer.**
- **Oracle Applications security is based on your Oracle Applications sign-on.**
- **Your sign-on connects you to your responsibilities, which control your access to applications, functions, reports, and data.**



Sign-on

- Your Sign-on can look as two types : Oracle Applications screen
- This is also known as accessing Forms-based applications. Forms-based responsibilities launch Oracle Applications Forms.





Sign-on

- Oracle Applications connects to Personal Homepage: page
 - This further connects to
 - Forms Based Applications
 - Self-service Applications





Choosing Responsibility

- If you are an authorized user of Oracle Applications, one of two things occurs after you sign on to Oracle Applications:
- The Navigate window appears listing your current responsibility in the window title.
- A window containing a list of responsibilities appears.

The screenshot displays two overlapping Oracle Applications windows. The 'Responsibilities' window is in the foreground, showing a search bar with 'Find %' and a list of responsibilities. 'AK Developer' is selected and highlighted in blue. The 'Navigator - General Ledger Super User' window is visible behind it, showing a menu with 'Functions', 'Documents', and 'Processes'. Under 'Functions', the 'Journals' option is selected and highlighted in blue. The 'Journals' section contains a list of options: '+ Journals', '+ Budgets', '+ Inquiry', '+ Currency', '+ Consolidation', '+ Reports', '+ Setup', and '+ Other'. To the right of this list is a 'Top Ten List' area, which is currently empty. At the bottom of the Navigator window, there is an 'Open' button.



Oracle Applications: Navigation

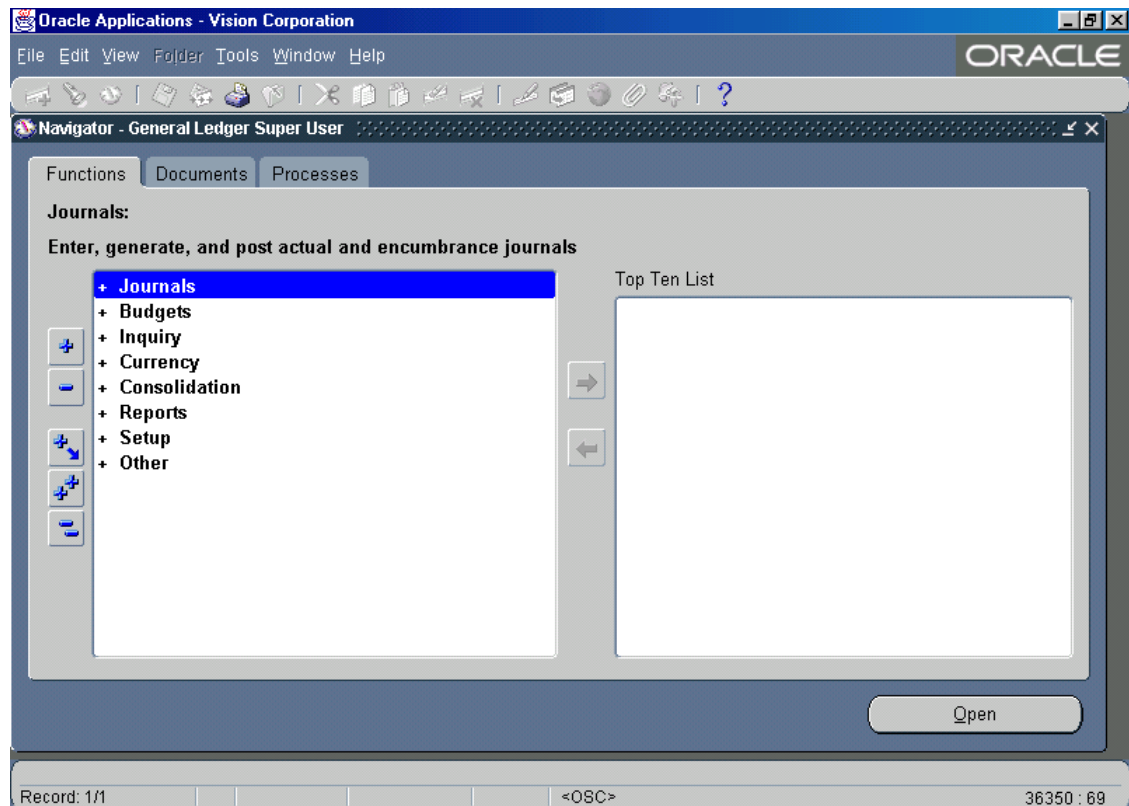
- **Login (three tabs are visible)**
 - Functions : Access to Forms
 - Process Navigator : Graphical maps to business processes, to automate processes flows across product boundaries
 - Documents (Customizable Link to documents : PO, Invoices..)



Navigator Window

➤ Opening a Form from the Navigator Window

- Use the Navigator window to navigate to a form that lets you perform a specific business flow.
- The Navigator window is always present during your session of Oracle Applications and displays the name of your current responsibility in its window title.





Navigator Regions

- **The Navigator consists of three regions:**
- **Functions, Documents, and Processes.**
 - Functions region provides a list of forms displayed like the files in a file system.
 - Documents region is a customizable region that allows you to create links to specific documents that you use frequently.
 - Processes region provides graphical maps of business processes, allowing you to automate business flows across forms.



Navigator

- **Navigator shows forms you can navigate to and has an explorer like structure.**

- **Expand/collapse buttons:**
 - Double ++ to expand all the sub-levels
 - Single + expands All children sublevels
 - Double -- : collapses all sublevels
 - Single - : collapses all child sublevels

- **Most favorites addons : By passing them to righthand list**
- **Choosing a Form: select Open Form or Double Click or Use ^L to get LOV and then select a specific form.**



Navigator

- **If there are forms that you use frequently, you can copy them over to a navigation top ten list located on the right-hand side of the Navigate window. The top ten list displays your forms numerically so you can choose them instantly without having to search for them in the navigation list.**
- **To open a form from the navigation top ten list:**
 - Type the top ten list number that precedes the form you want to open.



Switching Responsibility or User

- **If you have several responsibilities and you want to work in Oracle Applications under a different responsibility, you can do so without exiting Oracle Applications.**
 - Choose Navigator from the Window menu to make the Navigate window active then Choose Switch Responsibility from the File menu.
 - Have a look at other menu options under File main menu.
 - Logon as a different user
 - Attention: When you sign on to Oracle Applications as a different user, any windows that are currently opened will be automatically closed.
 - You can change your password using: Choose Change Password... from the Edit, Preferences menu, to display the Password Update window.



Using Forms & Menus

- **Oracle Applications use a Multiple Document Interface (MDI). All windows are displayed inside a single container window, with a single toolbar, menu, message line, and status line attached to that window.**
- **Pulldown Menu : The pulldown menu bar includes the following menus:**
 - File
 - Edit
 - View
 - Folder
 - Tools
 - Special A & B (only visible when active)
 - Window
 - Help



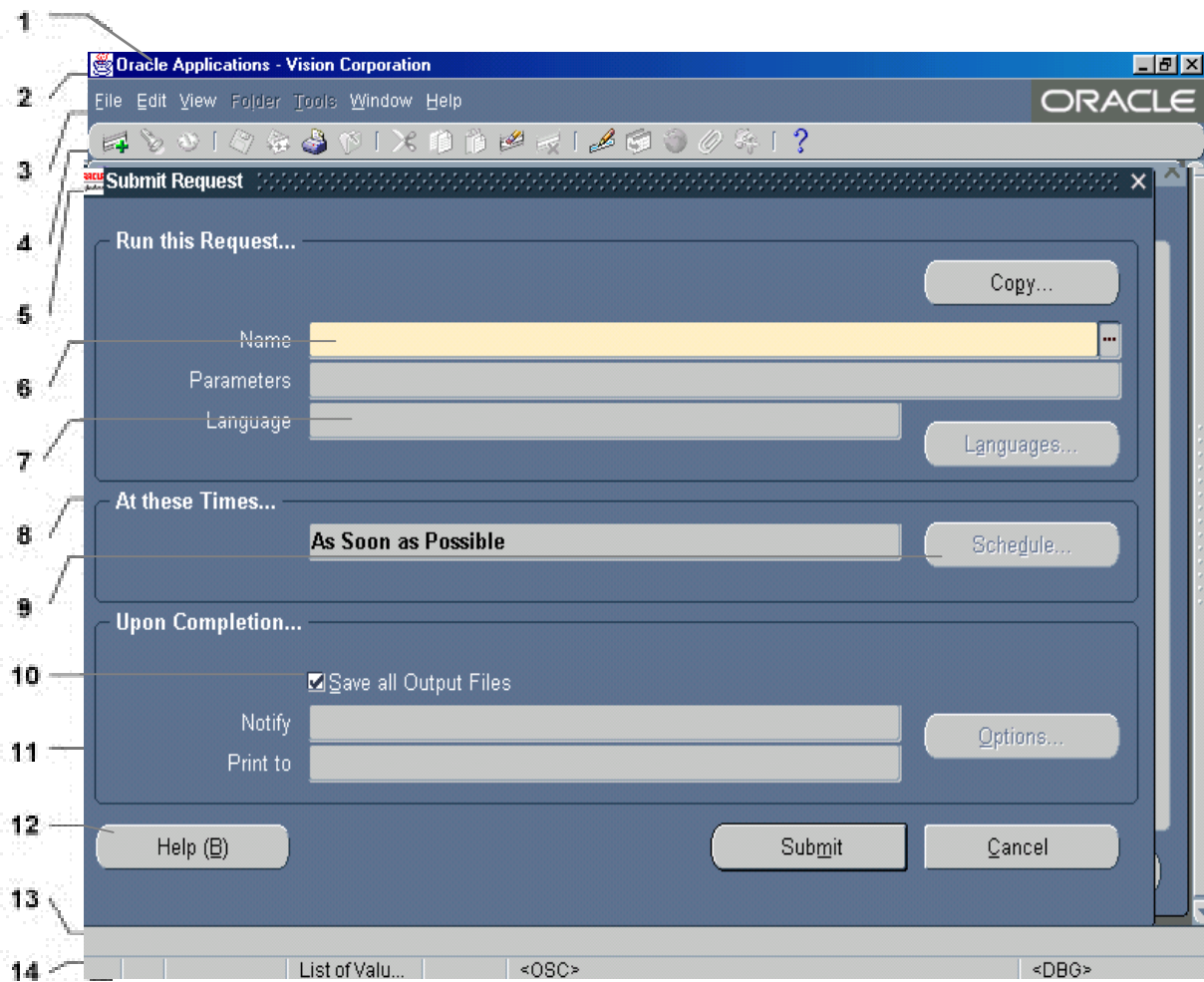
Using Forms & Menus

- **Use these menus to navigate through a form, to edit or retrieve data, or to perform various other actions.**
- **To display a list of keyboard shortcuts:**
 - Choose Keyboard Help... from the Help menu.



User Interface

1. Applications Window
2. Title Bar
3. Menu
4. Toolbar
5. Window Title
6. Required Field
7. Field (display only)
8. Region Title
9. Disabled Button
10. Checkbox
11. Region Border
12. Button (enabled)
13. Message Line
14. Status Line





User Interface

- 15. Option Group
- 16. Selected Option
- 17. Disabled Option
- 18. Poplist

The screenshot shows the 'Schedule' dialog box in Oracle Applications. The window title is 'Oracle Applications' and the menu bar includes 'File', 'Edit', 'View', 'Folder', 'Tools', 'Window', and 'Help'. The toolbar contains various icons for file operations. The dialog box has a title bar 'Schedule' and a close button. The main area contains several sections: 'Apply a Saved Schedule...' with a button and a text field; 'Run the Job...' with a group box containing five radio button options: 'As Soon as Possible' (selected), 'Once', 'Periodically', 'On Specific Days', and 'Advanced'; 'Start At' and 'End At' date/time pickers, with 'Start At' set to '24-APR-2001 16:48:16'; 'Leave End Date blank to run indefinitely'; 'Re-run every' with a numeric input '1' and a poplist 'Day(s)'; 'Apply the Interval...' with two radio button options: 'From the Start of the prior run' (selected) and 'From the Completion of the prior run'; and a checkbox 'Increment date parameters each run'. At the bottom, there is a 'Save this schedule' checkbox, a 'Help' button, and 'OK' and 'Cancel' buttons. The status bar at the bottom shows 'List of Valu...', '<OSC>', and '<DBG>'. Annotations with numbers 15 through 18 point to the 'Run the Job...' group box, the 'As Soon as Possible' radio button, the 'Periodically' radio button, and the 'Day(s)' poplist respectively.



User Interface


Drill-Down Indicators







- **When a record or field provides the drill-down capability, it lets you navigate directly to another window that displays details of the current record or field, or information related to the current record or field.**
- **Records that provide drill-down are indicated by a wide width current record indicator. By double-clicking on the indicator you will navigate to the detail window.**



Tool Bar

- The toolbar is a collection of iconic buttons, where each button performs a specific action when you choose it.
- Each toolbar button replicates a commonly-used menu item.
- Depending on the context of the current field or window, a toolbar button can be enabled or disabled.



	New - Opens a new record in the active form
	Find - Displays the Find window to retrieve records.
	Show Navigator - Displays the Navigator window.
	Save - Saves any pending changes in the active form
	Next Step - Updates the Process workflow in the Navigator by advancing to the next step in the process.
	Print - Prints the current screen that the cursor is in. In some cases it may print a report associated with the current data.



Entering Data

- **Clearing Data**
- **Simple data entry features & ability to cut, paste, copy and duplicate record are available.**
- **You can clear data from the screen at almost any time. The data you clear is simply erased from the screen and not deleted from your database.**
 - Choose Clear, Field or Record, Block or Form from the Edit menu.
 - This is useful when user wants to start a Query but actually enters data in normal entry mode.
- **Learning About a Record**
 - You can always display information about a record that has been saved before. The information includes who created the record, the date of creation, and the database table where the record resides.
 - Choose Record History from the Help menu.



Navigation (1 of 3)

➤ Form Fields Color

- White with green underline text: Supports Drill down
- Yellow field require data entry
- Blue: Fields to use in query enter mode
- Region : Logically related fields, enclosed by a rectangular box.

➤ Current Active Record:

- One character filled on left side in a multi record block
- If the current record has two character wide fields then it supports drill down.

➤ Status Line:

- Number of records.. and Message Line: Helpful hints



Navigation (2 of 3)

➤ Other basics

- Combinations Block : Supports both MultiRecord and Single record format. This can be done by selecting Summary/Detail from View menu.

➤ Query

- Query Navigation if large number of records: Use View > Record > Last gets the 100th record then ask if to continue

➤ Export:

- From the File Menu, to export Multirecord data into tabbed delimited file use query find and the export .
- Use the Export feature to export records in a multi-row block to a tabbed-delimited file which you can open in the application of your choice. Export always uses the records and format currently queried in the form. Thus, you can control the data to be exported using the query functions of the form, such as Query Find.



Navigation (3 of 3)

- **To Select Multiple Records for some actions use the Ctrl Key, hold it down and select by clicking on each record.**

- **Folder Block:**
 - A special block where user can customize field and record layout. Can be recognized by Folder icon in the block and folder tools in tool bar.
 - Folder allows user to select fields to be displayed, prompts, width, sequence, Order and specific criteria for subset of records. This folder can be saved to use later for later use again.



Flexfields

- **A flexfield is a flexible data field that your organization can customize to your business needs without programming.**
- **Oracle Applications uses two types of flexfields, key flexfields and descriptive flexfields.**
 - A key flexfield is a field you can customize to enter multi-segment values such as part numbers, account numbers, and so on.
 - A descriptive flexfield is a field you customize to enter additional information for which your Oracle Applications product has not already provided a field.



Key flexfields

- **A key flexfield is a field made up of segments, where each segment has both a value and a meaning.**
- **You can think of a key flexfield as an “intelligent” field that your business can use to store information represented as “codes.”**
- **Most organizations use “codes” to identify general ledger accounts, part numbers, and other business entities.**
- **Each segment in the code represents a characteristic of the entity.**
- **A key flexfield is flexible enough to let you use any code scheme you want to describe an entity.**



Descriptive Flexfield

- **A descriptive flexfield gives you room to expand your forms, since Oracle Applications cannot predict all the possible information you may want to track.**
- **Your organization can use descriptive flexfields to capture additional information that is important and unique to your business.**
- **A descriptive flexfield appears in a block as a two character, unnamed field enclosed in brackets.**
- **A descriptive flexfield window appears when you move your cursor into a customized descriptive flexfield.**
- **Each segment in a descriptive flexfield window has a name, and can have a set of valid values. Your organization can define dependencies among the segments or customize a descriptive flexfield to display context-sensitive segments, so that different segments appear depending on the values you enter in other fields or segments.**



Entering Data into Flexfield

➤ Descriptive Flexfield Window

- Move your cursor into a customized descriptive flexfield to display the flexfield window.
- When the window appears, the cursor moves to the first segment that does not contain a default value.
- Enter a value in each segment.
- Depending on how your organization customizes a descriptive flexfield, you can either type a value into a segment, or if the <List> lamp appears on the status line for a particular segment, you can display a list of values to choose from for that segment.



Key Flexfield

- **To enter a known combination into a key flexfield:**
 - Move your cursor into the key flexfield.
 - If you know the exact combination of segment values you want, enter the concatenated combination directly into the key flexfield
- **To display a list of existing combinations:**
 - Move your cursor into the key flexfield.
 - Choose the List of Values icon to open the Flexfield window.
 - Choose Combinations in the flexfield window to display the existing combinations.
 - If there are several combinations you may be asked to enter values for the segments to shorten the list.
 - To see all combinations enter '%' in one of the segment fields and choose OK.



Reports & Programs

- **Every Oracle Applications product contains reports and programs that are specific to that product.**
- **A report generates a summary or detail presentation of Oracle Applications information, whereas a program can perform a function.**
- **The reports and programs you have access to are defined by the responsibility you use.**
- **Oracle Applications provides two features called**
 - **Concurrent processing and Standard Request Submission to help you run the reports and programs that are a part of your responsibility.**



Running Reports & Programs

- **Running Oracle Applications Reports and Programs**
 - Concurrent Processing implies ability to run non-interactive, data dependent function such as a report or program simultaneously with online operations
 - With concurrent processing, you can complete non-interactive tasks without interfering with the interactive work you perform at your computer.
 - Standard request submission works with concurrent processing and provides a common interface for running Oracle applications reports and programs
 - Oracle Applications runs all of its reports and programs as concurrent processes.



Request set

➤ Request Set

- Request set is a collection of report/programs that you group together and can be submitted to run in a single interaction
- The concurrent requests are run and monitored by a concurrent manager .



Some Definitions

➤ **Concurrent Program**

- A concurrent program is a program that does not require continued interaction on your part to perform a specific task.

➤ **Concurrent Request**

- A concurrent request is a request that you submit to run a concurrent program as a concurrent process. You issue a concurrent request when you submit a report or program to run using Standard Request submission.



Concurrent Processing

➤ Concurrent Manager

- A concurrent manager is a component of concurrent processing that monitors and runs tasks without tying up your computer.

➤ Concurrent Processing Options

- you control and change the number of copies to print, what print style to use, and which printer to use
- you can also choose to hold a request from being run, choose a specific date or time to start a request
- choose to save the results of your concurrent request in a standard file format.



Concurrent Processing

➤ Online Request Review

- You can review the output and log files from your concurrent requests online.
- You can see the results of a concurrent request without the delay of printing out the entire report or log file.



Concurrent Processing

➤ Scheduling

- Using Standard Request Submission, you can define schedules to automatically resubmit your program, report, or request set. At submission time, you can specify:
 - starting date and time
 - the time of day for resubmission
 - the resubmission interval in months, days, hours, or minutes from either the start or completion of the request
 - the date and time to stop repeating the program, report, or request set day or days of the week or month to resubmit
- Oracle Applications automatically resubmits the program, report, or request set until the end date.



Standard Request Submission

- **Standard Request Submission provides you with a set of windows for running reports and programs and a set of windows for creating groups of reports and programs to run together.**
- **These windows give you control over the submission and output of your reports and programs.**



Standard Request Submission- Features

- **Use a standard interface to run your programs and reports.**
 - Control access to different programs and reports.
 - Pass parameters from your environment to your reports and programs.
 - View report output online.
 - Create and run sets of reports and programs.
 - Automatically run programs, reports, or request sets at specific time intervals.



SRS-Features

- Specify whether reports and programs in a request set run sequentially or simultaneously.
- Specify whether to continue with a request set if a report or program in a sequential set fails.
- Specify alternative requests to run based on the completion status of previously run requests in a request set.
- View a log file that summarizes the completion information about all the reports and programs in a request set.

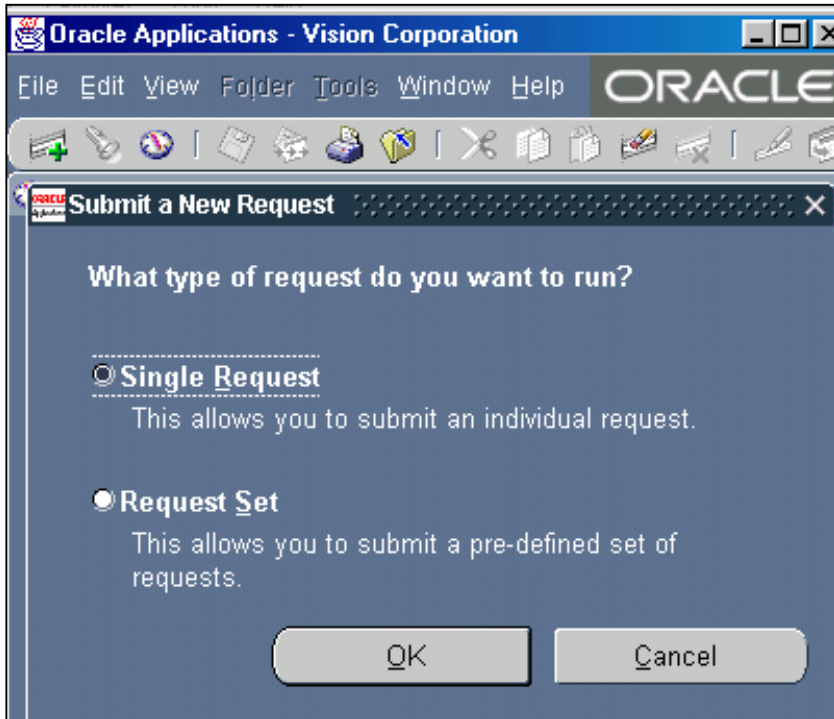


Submitting a request

- **There are three elements to submitting a request. Selecting the request or request set to be submitted, defining a submission schedule, and providing completion options.**
 - Selecting the request or request set may require you to provide request parameters and the output language.
 - Defining a schedule can be as simple as submitting as soon as possible or using a more complex schedule that you define when you first submit your request and may be used for other requests in the future.
 - Completion options allow you to deliver request output to others and specify which printers and how many copies of the output you want to produce for each request.



Request submission



To submit a request:

1. Navigate to the Submit a New Request window (Other → Requests → Run).
2. Check the Request option to submit single requests, or choose to submit a predefined group of requests by checking Request Set.
3. Choose OK.



Request Submission

Submitting requests

4. Use the Copy...button to take advantage of previously entered request submissions.

5. Select the Name of the request (report or program) you want to run from the list of available requests.

Note: Your responsibility's request group determines which requests appear in the list.

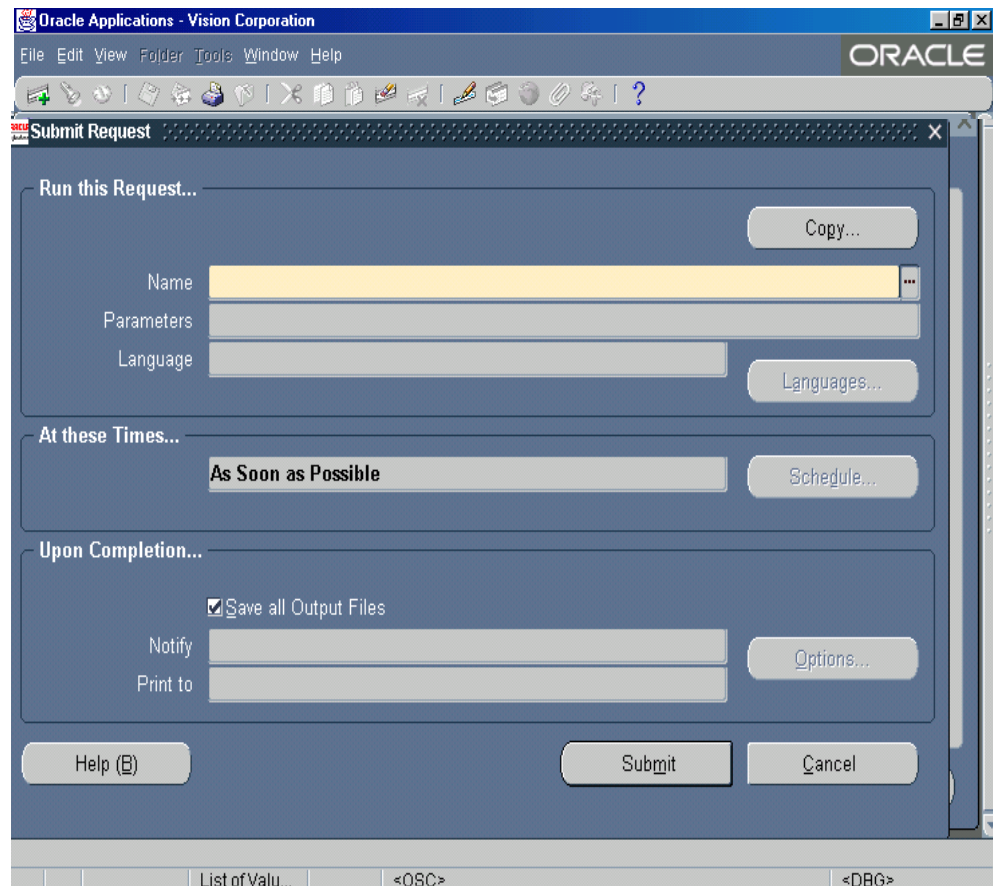
Defining Parameters

6. A Parameters window automatically appears if you select a request

that requires parameter values and your profile Flexfields:Open Descr Window is set to Yes.

Choose a type of schedule from the following:

- **As Soon as possible,**
- **Once: Submits your request once at the time and date you specify.**
- **Periodically**
- **On Specific Days (of week or month)**





Monitor & View Request

- **Use the Find Requests window**
- **Use the Requests window**
- **View the progress of a concurrent request**
- **Cancel a request or change its processing options**
 - Since all reports, programs, and request sets are run as concurrent requests in Oracle Applications, you use the Requests window to view the status and output of your requests.



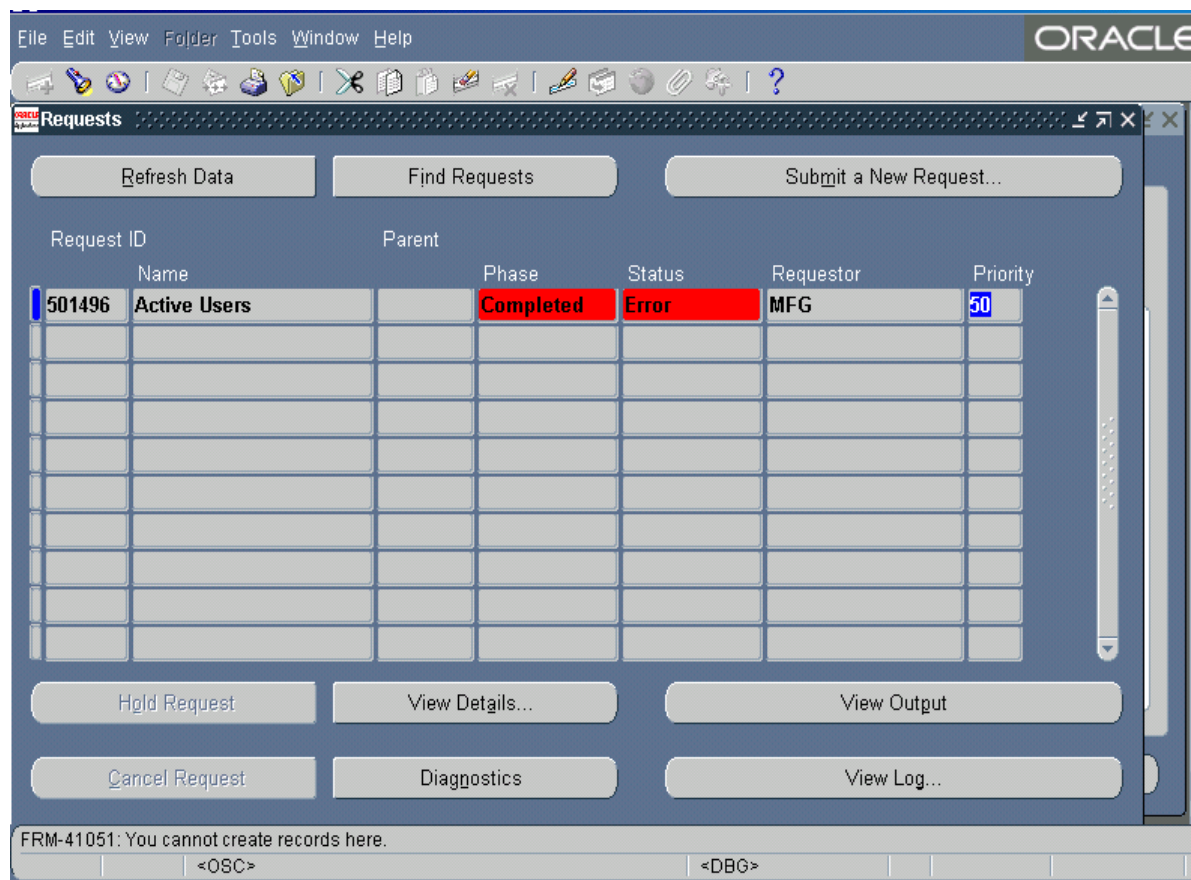
Requests Window

- **When submit a request Oracle Applications assigns a request ID to the request. You can use this Request Id to search for your request.**
- **You can use the Requests window to view**
 - a list of all submitted concurrent requests
 - check whether your request has run
 - Change aspects of a request's processing options, diagnose errors,
 - find the position of your request in the queues of available concurrent managers
- **Navigating to View Requests**
 - Use Find Requests window from the Navigator menu
- **Checking detailed status and Output, Log etc.**
 - Navigate to your request and use buttons to display as needed



View Output & Log

- To View Request Output: **Choose View Output**
- To view requests log files: **Choose View Log** to display the request's error log file.





Monitoring Requests

➤ Monitoring Requests

- Oracle Applications lets you monitor your concurrent requests when you display the Requests window. And, if your request has not yet started running, Oracle Applications lets you cancel or change some of the request's parameter, scheduling, or completion options.

➤ Concurrent Request Phase and Status

- The Requests window displays a phase and status summary for each concurrent request listed.
- A concurrent request has a life cycle consisting of the following phases: pending, running, completed, and inactive.
- During each phase, a concurrent request has a specific condition or status.



Monitoring Request

➤ Generally the first phase set for a request is “Pending”.

Phase	Status	Description
PENDING	Normal	Request is waiting for the next available manager.
	Standby	Program to run request is incompatible with other program(s) currently running
	Scheduled	Request is scheduled to start at a future time or date.
	Waiting	A child request is waiting for its Parent request to mark it ready to run. For example, a request in a request set that runs sequentially must wait for a prior request to complete.

RUNNING	Normal	Request is running normally.
	Paused	Parent request pauses for all its child requests to finish running. For example, a request set pauses for all requests in the set to complete.
	Resuming	All requests submitted by the same parent request have completed running. The Parent request resumes running.
	Terminating	Request is terminated by choosing the <i>Cancel Request</i> button in Requests window.



Monitoring

Phase	Status	Description
COMPLETED	Normal	Request completed successfully.
	Error	Request failed to complete successfully.
	Warning	Request completed with warnings. For example, a request is generated successfully but fails to print.
	Cancelled	Pending or Inactive request is cancelled by choosing the <i>Cancel Request</i> button in the Requests window.
	Terminated	Request is terminated by choosing the <i>Cancel Request</i> button in the Requests window.

INACTIVE	Disabled	Program to run request is not enabled. Contact your system administrator.
	On Hold	Pending request is placed on hold by choosing the <i>Hold Request</i> button in the Requests window.
	No Manager	No manager is defined to run the request. Check with your system administrator. A status of No Manager is also given when all managers are locked by the run-alone requests.



Canceling Request

- **Use the Requests window to cancel a request (report, program, or request set) that has not yet completed.**
- **To cancel a request that has not yet completed:**
 - Navigate to the Find Requests window.
 - Check My Requests in Progress.
 - Choose Find.
- **With your cursor on the request you wish to cancel, choose Cancel Request to terminate the request.**
- **You can only cancel a request if it is in the Running, Pending, or Inactive phase.**
- **You can put your request on hold by choosing Hold Request if the request is Pending or Inactive.**



Request

- **If you terminate a request while it is in the Running phase, the current run stops, but the resubmission does not.**
- **While the resubmitted request is in the Pending phase**
 - you can go to the Resubmission tabbed region of the Requests window and change the Interval for the request to 0 or change the End Date to a date that has passed to cancel the resubmission.
- **Changing Request Options**
 - If your request or request set has not started running, you can change how your request or request set runs and prints its output using the Requests window.



Understanding User Profiles

- **Oracle Applications user profiles help you satisfy the following business needs.**
 - Set options that affect your application's behavior to your preference
 - Modify product-specific variables that affect the functionality of your application to suit your business environment
 - User profiles give you control over the behavior of certain Oracle Applications features.
 - A user profile is a collection of changeable options that affect the way your applications run.
 - Oracle Applications establishes a value for each option in a user's profile when the user logs on or changes responsibility.
 - Oracle Applications provides these options so that you can alter the behavior of your applications to suit your own preferences.



User Profiles

- **Oracle Applications uses a set of user profile options**
 - Are common to all the application products.
 - Each application product has its own unique set of user profile options.
 - The reference guide for your application contains a complete list and a description of each user profile option that is specific to your application.
 - User profile options can be set at one or more of four levels: Site, Application, Responsibility, and User.
 - Your system administrator can set default option values at any of these levels.



User Profiles Levels

➤ User Profile Hierarchy

Oracle Applications treats user profile levels as a hierarchy, where User is the highest level of the hierarchy, followed by Responsibility, Application, and at the lowest level, Site.

Site Level :

- Site is the lowest profile level. Site–level option values affect the way all applications run at a given installation site.

Application Level:

- Application is the profile level immediately above Site. Application–level option values affect the way a given application runs.



User Profiles Level

➤ Responsibility Level :

- Responsibility is the profile level immediately above Application. Responsibility–level option values affect the way applications run for all users of a given responsibility.

➤ User Level:

- User is the highest profile level and is immediately above Responsibility. User–level option values affect the way applications run for a given application user.



User Profile

- **Your system administrator can set values for user profile options at each profile level.**
 - Typically, your system administrator sets Site–level option values after installing Oracle Applications at a site.
 - These Site–level option values apply until you or your system administrator changes them.
 - Oracle Applications derives a run–time value for each user’s profile option based on the value set at the highest hierarchy level.
 - Any change your system administrator makes to your profile options takes effect as soon as you log on again or change responsibilities.
 - You can set your own preference at the User–level, since your User–level setting overrides the Responsibility–level setting.
 - Some option values can only be changed by the system administrator.



User Profiles : Examples

- **Edit menu is used to open profiles window. Checkout some of these examples**
 - **Attachment File upload directory** : This Provides the directory path used to upload attachment files.
 - **Set of Books Name** : Provides access to specific Set of Books in GL
 - **MO Operating Unit** : This allows user to specify operating unit
 - **Sign-on Notification** : Messages about failed concurrent programs or failed logins
 - **Viewer**: To set up Browser for viewing the documents.
 - **Default Country** : This is the default source for the Country field for all address zones and is used by the Flexible Address Formats feature, the Flexible Bank Structures feature and the Tax Registration Number and Taxpayer ID validation routines.
 - **Flexfields**:Open Descr Window: You can control whether a descriptive flexfield window automatically opens when you navigate to a customized descriptive flexfield.