Oracle® Applications

User's Guide

Release 11*i*

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ORACLE®

Contents

Preface

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

This user's guide includes the information you need to work with Oracle Applications effectively. It contains detailed information about the following:

- Overview and reference information
- How to navigate through Oracle Applications Windows
- How to submit Oracle Applications programs, reports, and listings

This preface explains how this user's guide is organized and introduces other sources of information that can help you.

Audience for This Guide

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

- The principles and customary practices of your business area

- Oracle Applications

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

See: Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

This guide contains the information you need to understand and use Oracle Applications.

- Chapter 1, "Getting Started," introduces you to Oracle Applications and to some basic features common to all Oracle Applications products. It tells you how to log in, choose a responsibility, use the menu, get Help, use keyboard shortcuts, and exit.

- Chapter 2, "Oracle Applications User Interface Basics," introduces you to the Oracle Applications user interface and teaches you a few simple concepts and functions you need to start working. Specifically, this chapter describes the anatomy of the Oracle Applications user interface, how to navigate around Oracle Applications, how to view message explanations, and how to access linked forms.

- Chapter 3, "Entering and Querying Data," discusses advanced features that help you enter and query data from Oracle Applications. Specifically, this chapter describes how to simplify data entry using a list of values, how to enter a date using the Calendar, and how to search for information.

- Chapter 4, "Customizing the Presentation of Data," discusses how you can customize the layout of your data in a folder.

- Chapter 5, "Using Flexfields," contains an explanation of flexfields and tells you how to use them. You learn about the features of flexfields, the differences between a key and a descriptive flexfield, how to enter data into flexfields, and how to query data using flexfields.

- Chapter 6, "Running Oracle Applications Reports and Programs," gives you an overview of how to run reports and programs in Oracle Applications. Specifically, you learn about the concurrent processing feature that allows you to run reports and programs non–interactively, how to run reports and programs using Standard Report Submission, and how to define request sets.

- Chapter 7, "Monitoring Oracle Applications Reports and Programs," tells you how to view and monitor your requests. Specifically, this chapter tells you how to use the Concurrent Requests, Requests, and Completed Requests windows, how to view the progress of a concurrent request, how to cancel a request or change its processing options, and how concurrent processing recovers from unforeseen system events.

- Chapter 8, "Working with Attachments," describes attaching a document to a data record, as well as how to view, delete, or copy an attachment.

- Chapter 9, "Using User Profiles," teaches you about Oracle Applications user profiles. User profiles give you control over the behavior of certain Oracle Applications features. This chapter tells you how to set user profile options for all Oracle Applications products.

- Appendix A, "Oracle Applications Menus," describes the Oracle Applications main menu bar.

- Appendix B, "Customizing the Personal Homepage," describes how to use and customize your personal homepage.

- Appendix C, "Accessibility," describes specific features in Oracle Applications to enhance usability.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other market–leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at http://www.oracle.com/accessibility/.

Accessibility of Code Examples in Documentation

JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Accessibility of Links to External Web Sites in Documentation

This documentation may contain links to Web sites of other companies or organizations that Oracle Corporation does not own or control. Oracle Corporation neither evaluates nor makes any representations regarding the accessibility of these Web sites.

Other Information Sources

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

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

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF).

- **Online Help** – The new features section in the HTML help describes new features in 11*i*. This information is updated for each new release of Oracle Applications. The new features section also includes information about any features that were not yet available when this guide was printed. For example, if your administrator has installed software from a mini–packs upgrade, this document describes the new features. Online help patches are available on MetaLink.

- **11*i* Features Matrix** – This document lists new features available by patch and identifies any associated new documentation. The new features matrix document is available on MetaLink.

- **Readme File** – Refer to the readme file for patches that you have installed to learn about new documentation or documentation patches that you can download.

Related User's Guides

Oracle Applications shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other user's guides when you set up and use Oracle Applications.

You can read the guides online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at http://oraclestore.oracle.com.

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications–wide features such as Business Intelligence (BIS), languages and character sets, and Self–Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product–specific upgrade tasks. You must be either at Release 10.7

(NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how–to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Other Implementation Documentation

Oracle Applications Product Update Notes

Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11*i*. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle Applications–embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle Workflow API Reference

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup, reference, and ongoing maintenance information. This manual also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non–Oracle applications, and write custom reports for Oracle Applications. Oracle eTRM is available on MetaLink.

Oracle Applications Message Reference Manual

This manual describes all Oracle Applications messages. This manual is available in HTML format on the documentation CD–ROM for Release 11i.

Training and Support

Training

Oracle offers a complete set of training courses to help you and your staff master Oracle Applications and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or

you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on–site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Applications working for you. This team includes your Technical Representative, Account Manager, and

Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8*i* server, and your hardware and software environment.

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed

your information because SQL*Plus and other database tools do not keep a record of changes.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

Your Feedback

Thank you for using Oracle Applications and this user's guide.

Oracle values your comments and feedback. At the end of this guide is a Reader's Comment Form you can use to explain what you like or dislike about Oracle Applications or this user's guide. Mail your comments to the following address or call us directly at (650) 506–7000.

Oracle Applications Documentation Manager
Oracle Corporation
500 Oracle Parkway
Redwood Shores, CA 94065
U.S.A.

Or, send electronic mail to **appsdoc_us@oracle.com**.

1

Getting Started

This chapter introduces you to Oracle Applications. Specifically, this chapter teaches you how to:

- Start Oracle Applications

- Use Oracle Applications menus

- Use keyboard shortcuts

- Get help in Oracle Applications

- Exit from Oracle Applications

In addition, this chapter also lists some basic graphical user interface terms used throughout the guide.

Overview of Oracle Applications

Oracle Applications is a tightly–integrated family of application products that share a common look and feel. Using the menus and windows of Oracle Applications, you have access to all the functions you need to manage your business information.

Oracle Applications is highly responsive to users, supporting a multi–window graphical user interface (GUI) that provides you with full point–and–click capability. You can use your mouse or keyboard to operate graphical controls such as pull–down menus, buttons, poplists, and check boxes.

In addition, Oracle Applications offers many other features such as field–to–field validation and list of values to help you simplify data entry and maintain the integrity of the data you enter.

The best way to familiarize yourself with the common look and feel of Oracle Applications products is to log in and use the products. This chapter describes how to get started with Oracle Applications and provides you with the basic information you need to explore Oracle Applications in greater depth.

> **Suggestion:** This guide teaches you how to use the Oracle Applications GUI and other common Oracle Applications features. If you need specific information about a particular Oracle Applications product, you should consult the help or reference guide for that product. For example, if you wish to learn how to enter a journal, you should consult the *Oracle General Ledger User's Guide* or the *Oracle Public Sector General Ledger User's Guide.*

Basic Business Needs

Oracle Applications provides you with features you need for your business. With Oracle Applications you can:

- **Learn how to use the system quickly**. Oracle Applications uses familiar and easy–to–use menus so you, your staff, and your new employees can be productive after a few minutes of coaching from a colleague.

- **Be productive even if you are a novice user.** A simple, intuitive graphical user interface (GUI) lets you use all of the power of Oracle Applications.

- **Increase your productivity as a power user.** When you become familiar with Oracle Applications, you can use shortcuts in the graphical user interface to quickly navigate and work with multiple windows at once.

- **Get help when you need it.** Context–sensitive online help is always available whenever you need assistance.

- **Secure your application data from unauthorized access.** You can control access to your application data and customize the windows available for each user based on that user's level of authority.

Basic GUI Terminology

Before using Oracle Applications, you should familiarize yourself with the specifics of your GUI environment and how to perform basic tasks, such as using a menu or selecting an item. In doing so, you should come across and become familiar with the following generic terms:

desktop   The part of your computer monitor that displays information and where your work takes place. This is also referred to as your *screen*.

window   A box around a set of related information on your desktop.

menu   A list that appears in a bar across the top of a window that consists of commands or actions you can perform.

click   Quickly press and release a mouse button while the mouse pointer is on a particular item.

double–click Rapidly click a mouse button twice while the mouse pointer is on a particular item.

drag   Move the mouse while holding down a mouse button.

select   Mark an item. Examples include highlighting text, or clicking on a value from a list.

choose   Select an item and initiate the action associated with the item. Examples include choosing a menu item or choosing a button.

scroll bar   A vertical or horizontal bar that appears on a window whose contents are not entirely visible.

Click on the arrows, or drag on the box of a scroll bar to scroll through the hidden contents, or click in the bar itself to move to either the previous or next page.

Note: The mouse button that we refer to in the terms above is the mouse button that you program for selecting text and choosing items. (Usually the left mouse button)

Once you get started in Oracle Applications, you can refer to the Oracle Applications User Interface section of this guide for a more comprehensive list of user interface terms. See: Oracle Applications User Interface: page 2 – 2.

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

Starting and Logging On

The first step in starting Oracle Applications is to enter the appropriate URL for your site in an Oracle Applications certified browser.

After starting Oracle Applications, the first window you see is the **Login** window.

ORACLE
Oracle E-Business Suite

Login

Welcome to Oracle E-Business Suite

Enter your username and password to login

*Indicates Required Field

* Username [   ]

* Password [   ]

[Login]

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. If you are not sure of your Oracle Applications sign–on, consult your system administrator.

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.

> **Note:** The exact appearance of your login window may vary depending on how it is customized at your site.

Getting Started in Oracle Applications

▶   **To log on to Oracle Applications:**

1.   Enter your username in the **Username** field.

☞   **Attention:**   Do not press [Enter] after entering each item, as [Enter] is normally used to accept the default button. Instead, use [Tab] or the mouse to navigate between fields.

2.   Enter your password in the **Password** field.

3.   (Conditional) Select a language.

If multiple languages are installed at your site, choose a language from the options presented.

4.   Choose **Login**.

Notice your password does not appear as you type it, to prevent others from seeing it. Keep your password confidential to prevent access to Oracle Applications by unauthorized users.

After you log in, you will see either the **E–Business Suite Home** page (see: page 1 – 8) or the **Personal Homepage** (see: page 1 – 14) depending on how your system is configured.

Features of the E–Business Suite Home Page

When you log in to Oracle Applications your **E–Business Suite Home** is displayed. From here you can:

- View and respond to notifications
- Access E–Business Suite Applications
- Navigate to other frequently–used functions or Web pages
- Set personal user preferences

Worklist

The **Worklist** portlet lists your five highest priority notifications, ordered by priority and then by date. For each notification, the list displays the from role, subject, and sent date. Select the **From**, **Subject**, or **Sent** column heading to sort the list by that column.

- To view and respond to a notification, select the notification subject link in the **Subject** column. For more information, see: To View the Details of a Notification, *Oracle Workflow User's Guide.*

- To view the complete list of all your notifications in the Advanced Worklist, select the **Full List** button. For more information, see: To View Notifications from the Advanced Worklist, *Oracle Workflow User's Guide.*

Menu

From the **Menu** portlet you can access Oracle E–Business Suite functions grouped by responsibility.

A *responsibility* is a level of authority in Oracle Applications that lets you access only those Oracle Applications functions and data appropriate to fulfill your role in an organization. Each responsibility allows access to:

- A specific application or applications, such as Oracle General Ledger.

- A set of books, such as U.S. Operations or German Sales or an organization, such as New York Manufacturing or New York Distribution.

- A restricted list of windows that you can navigate to; for example, a responsibility may allow certain Oracle Planning users to enter forecast items, but not enter master demand schedule items.

- A restricted list of functions you can perform. For example, two responsibilities may have access to the same window, but one responsibility's window may have additional function buttons that the other responsibility's window does not have.

- Reports in a specific application; your system administrator can assign groups of reports to one or more responsibilities, so the responsibility you choose determines the reports you can submit.

Each user has at least one responsibility and several users can share the same responsibility.

Two Types of Responsibilities

The **Menu** portlet may contain links to Self–Service applications as well as Forms–based applications.

Select the responsibility link to view its menu of functions on the adjacent pane. Select the function to launch it.

If you choose a Forms–based function, the Oracle Applications **Navigator** window will open. For more information about the **Navigator** window, see Opening a Form from the Navigator Window: page 1 – 15.

Favorites

This portlet contains a customized list of frequently–used functions and Web sites. To add or remove options from this list, select **Edit Favorites** to access the **Customize Favorites Portlet** page.

Customize Favorites Portlet Page

Use this window to add functions and Web sites to your **Favorites** portlet. Select individual functions from your responsibility menus. To add a Web site, click the **Add URL** button to access the **Add a Favorite Web Site** page.

You can also rename the selected functions in your **Favorites** portlet, or change the URL for a Web site. Click the **Rename** button to access the **Update a Favorite Web Site** page.

Add a Favorite Web Site

Enter the a name and the URL for any Web site that you wish to access from your **Favorites** portlet.

Update a Favorite Web Site

Use this page to update the displayed name of any option listed on your **Favorites** portlet or to update the URL for a listed Web site.

Preferences

Select the **Preferences** link (displayed at both the top and bottom of the **E–Business Suite Home** page) to set your personal user options. The **Preferences** page is divided into four categories: **General**, **Notification**, **Formatting**, and **Password Settings**.

General

Set the following options in this region:

- Known As—The name displayed for your user ID.

- Language—The session language you chose when you logged in. If there are multiple languages installed at your site, you can update your preference here.

- Territory—Determines the value for certain regionally–determined settings, such as numeric format (in concurrent manager reports) and start day of the week.

- Timezone – In Oracle Applications Framework HTML–based applications, this setting determines the timezone used when formatting fields that show dates and times.

- Client Character Encoding – The character set that your machine (client) uses as its native character set. This value should correspond to your chosen language and platform. See your system administrator before updating this option.

- Accessibility Features – Sets the accessibility mode for Oracle Applications Framework HTML–based applications. Values are:

  - Yes – generates HTML enhanced for accessibility.

  - No – generates HTML optimized to load screens faster by eliminating redundant content that is unnecessary for all users.

– Screen Reader – generates HTML optimized for the use of screen readers.

Notification

If you have an electronic mail address defined, you can choose the Notification Style (if any) for your notifications.

The options are:

- Do not send me mail
- HTML mail
- HTML mail with attachments
- Plain text mail
- Plain text mail with HTML attachments
- Plain text summary mail

Formatting

- Date Format—Choose a date format from the list provided.
- Number Format – Currently only the US number format is recognized in Oracle self–service applications.

Password Settings

Change your password here.

Accessing Oracle Applications Using the Personal Homepage

Choosing a Responsibility
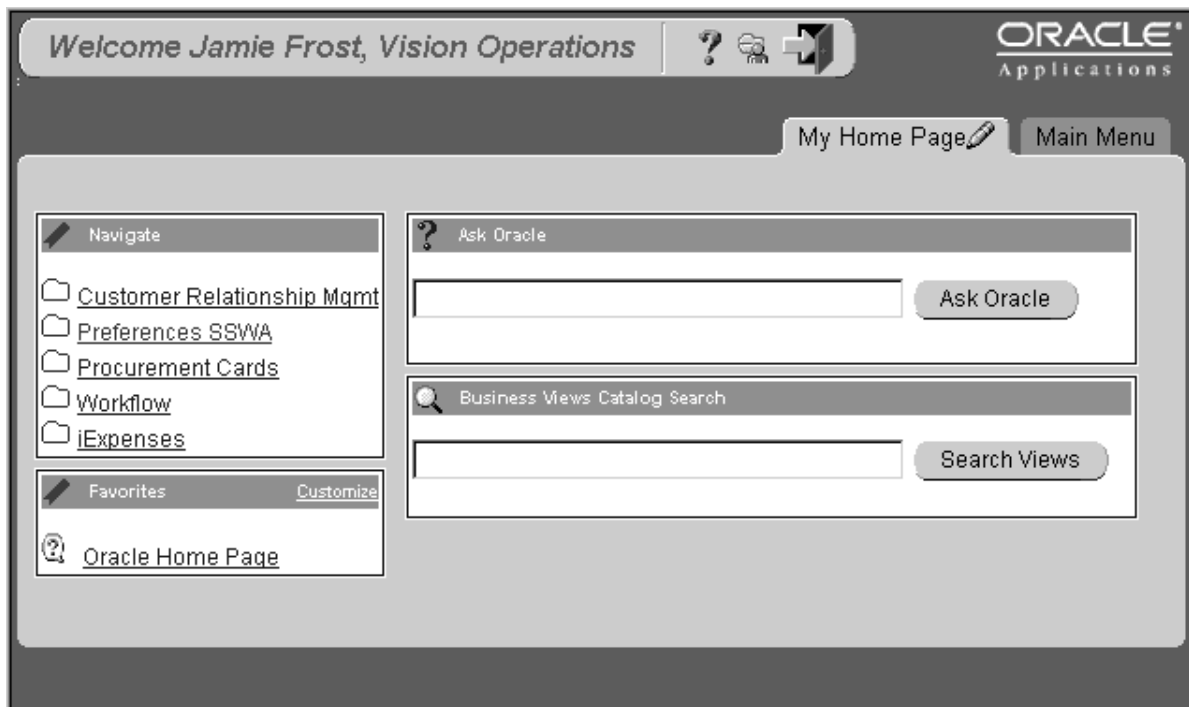
For the definition of a *responsibility*, see: page 1 – 9.

You will see a link for each responsibility assigned to you.

Two Types of Responsibilities

The **Navigate** region may contain links to Self–Service applications as well as Forms–based applications. To choose a responsibility, select the responsibility link.

▶ **If you choose a Self–Service application:**

The menu of functions will display in the adjacent region. Select the function to launch it.

▶ **If you choose a Forms–based responsibility:**

The Oracle Applications **Navigator** window will open. For more information about the Navigator Window, see Opening a Form from the Navigator Window: page 1 – 15.

Each user has at least one responsibility and several users can share the same responsibility.

> **Note:** If your system administrator assigns you just one Forms–based responsibility with no other options on your homepage, your responsibility will launch when you sign on.
>
> If you are assigned one Self–Service responsibility with many functions, and you have no other options on your personal homepage, your responsibility's list of functions will display as if you had clicked the link.
>
> If you are assigned one Self–Service responsibility with just one function, and you have no other options on your personal homepage, your function will launch automatically when you sign on.

Setting your Preferences Through the Personal Homepage

There are several choices you can make about how you want to view information in Oracle Applications. These choices include languages, date formats, and number formats.

To access your preferences, choose the Preferences link. For information on your preference options, see Preferences: page 1 – 12.

Additional Personal Homepage Features

For a description of additional features you may find on your Personal Homepage, see Personal Homepage in Oracle Applications: page B – 2.

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 Forms and displays the name of your current responsibility in its window title.
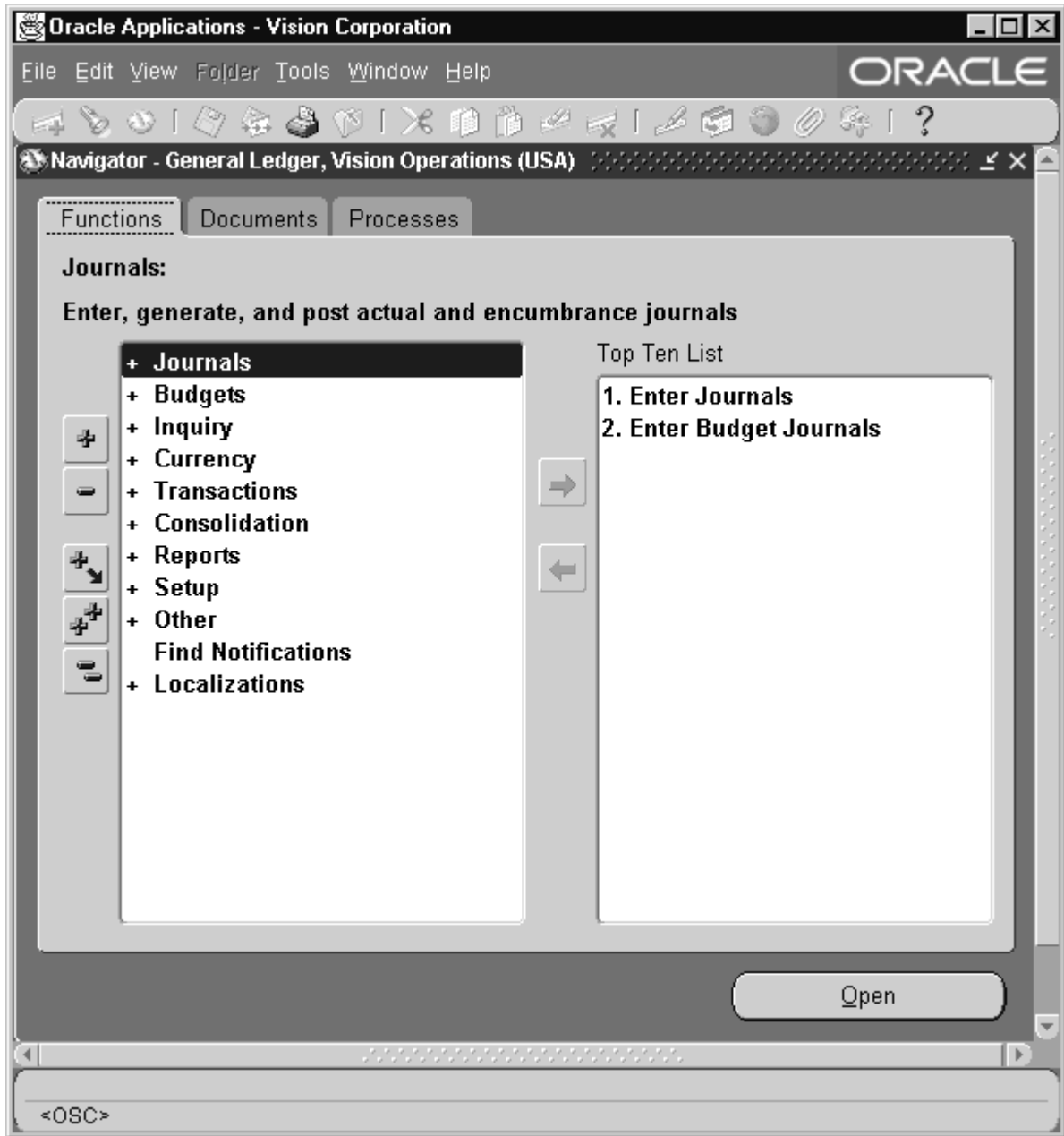
The Navigator consists of three regions: Functions, Documents, and Processes. The Functions region provides a list of forms displayed like the files in a file system, the Documents region is a customizable region that allows you to create links to specific documents that you use

frequently, and the Processes region provides graphical maps of business processes, allowing you to automate business flows across forms.

Using the Navigator's Functions Region

The forms that you can navigate to are displayed in a *navigation list* on the left–hand side of the Navigate window. The navigation list is organized much like the hierarchy of a file system, where you can expand items that begin with a plus sign (+) to further sub–levels until you find your form of interest. Sub–levels appear indented below the items from which they are expanded. Items that are expanded are preceded by a minus sign (–). You can expand no further when an item displays neither a plus or minus sign.

Above the navigation list, you should see two fields that span the width of the window. These two fields help you identify your selection. The top field displays the name of the item currently selected, while the bottom field displays a description of that item.

▶ **To expand or collapse the navigation list:**

1. Choose one of the following methods to expand an expandable item to its next sub–level:

   • Double–click on the item.

   • Select the item and choose **Open**.

   • Select the item and choose the **Expand** button.

2. Choose one of the following methods to collapse an expanded item:

   • Double–click on the item.

   • Select the item and choose the **Collapse** button.

3. To expand or collapse several items at once, choose one of the following buttons:

   • **Expand All Children**—expand all the sub–levels of the currently selected item

   • **Expand All**—expand all the sub–levels of all expandable items in the navigation list

   • **Collapse All**—collapses all currently expanded items in the navigation list

▶ **To open a form from the navigation list:**

1. Select your form of interest..

2. Choose **Open**.

Suggestion: Alternatively, you can double–click directly on the form of interest to open it. However, do not double–click on the Open button. All buttons require only a single click to activate; using a double click will activate the action twice.

▶ **To open a form using an LOV window:**

1. Use the keyboard shortcut (usually Ctrl L) to open the LOV (List of Values) window.

2. Select the form from the list and choose **OK** or first reduce the list by entering a partial form title.

See Also

Using Keyboard Shortcuts: page 1 – 26

Using a List of Values: page 3 – 9

Using the Top Ten List

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. You can add a maximum of ten forms to the top ten list and you can create a different top ten list for each responsibility you have access to.

Note: A top ten list is unique for the responsibility and user sign–on combination you use.

▶ **To create a navigation top ten list:**

1. Select a frequently used form from the navigation list.

2. Choose the arrow pointing to the Top Ten List.

The form now appears in the navigation top ten list preceded by a top ten list number.

3. If you wish to remove a form from the top ten list, select that form in the top ten list and choose arrow pointing away from the Top Ten 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. You can also select the form you want and choose **Open,** or double–click on the form name.

Notice that the name and description of that form also appear in the current selection fields above the navigation list.

Using the Navigator's Documents Region

If you have a document, such as a particular purchase order, invoice, or sales order that you want to access later, you can create a link to the document using the Navigator's Document feature. The Navigator's Document feature allows you to create as many links as you want and save them in the Documents region of the Navigator window. The links can be represented as icons in the window or may be viewed as a list. Documents are defined as "real–world" documents such as those listed above, but may also include such documents as employees or plans. When you use a link to open a document, Oracle Applications opens the document in the appropriate form window. You can access the Document region using the tab control.

▶ **Adding new Documents to the Navigator**

Forms that support adding documents to the Navigator enable the **Place on Navigator** menu item in the File menu. Use this menu item to add your document to the Navigator.

▶ **Opening the Navigator's Document Region**

Choose **Documents** from the tab control in the Navigation window.

Once you create a link to a document, the Document region will open by default when you log on.

▶ **To open a form from the Document Region**

1. Select the document link you want to open.

2. Choose **Open** or double–click it.

▶ **Renaming Documents in the Navigator**

1. Select the document link you want to rename.

2. Choose the **Rename...** button, or double–click the label.

3. Enter the new name, then press **OK**.

    Note: There is a limit of 80 characters for document names.

▶ **Removing Documents from the Navigator**

1. Select the document link to be discarded.

2. Choose **Remove**.

    Removing the document link from the Navigator has no effect on
    the actual document. However, if a record such as a purchase
    order is deleted in the "Enter Purchase Orders" form, the link in
    your Navigator displays a message letting you know that your link
    is now invalid.

Using the Navigator's Processes Region

The Processes region of the Navigator (the "Process Navigator")
automates business flows across Oracle Applications forms. It allows
you to model and execute complex business processes through an
easy–to–use, graphical user interface. The business processes enabled
through the Process Navigator can cross product boundaries and
include complete business cycles.

The Process Navigator guides you step–by–step through each required
function in a business process. In addition to providing a visual map of
a business process, the Process Navigator can launch the appropriate
Oracle Applications forms or standard reports at each step.

Each time you start a business process, you create an "instance" of that
process. You can create as many instances as you need. Each instance
maintains its own version of the process diagram identified by a name
you assign. As you complete each form or "step" within your process,
you can save the data and update your diagram to indicate that this
step is complete. When you open a subsequent form, the information
you entered in prior forms is used to query the appropriate data.

You are not required to complete a process before closing the process
instance. A process instance can be closed for later completion, or you

can choose to end the instance before completion. Ending a process instance does not change or modify any data you have entered.

Creating and Opening a Process

When you enter the Processes region, the processes assigned to your current responsibility are displayed in a list. To use a process, you create an instance of the process, and enter a name for the instance. This instance remains "active" until you complete or cancel the process. Active instances are listed in the Navigator below the process from which they were derived. Instances are available only to the user who created them.

▶ **Creating a new instance**

1. Select a process.

2. Choose Launch.

3. Enter the name for the new instance. This name appears in the Navigator Processes list.

▶ **Open an existing process instance**

Single click on the process instance you want to open in the Navigator Processes list.

The Navigator continues to display the current process instance until you select another.

Working in a Process Instance

The process instance displays a diagram containing various steps, with each step represented by an icon. The active step or steps are indicated by green boxes drawn around the step icons. There may be more than one active step if your process contains multiple paths.

The diagram allows you to view a brief description of each step or to open the form associated with a step.

▶ **Opening a form**

Click once on any step icon within a process to display a brief description of that step.

Double–click on an icon to open the related Oracle Applications form.

Note: You can open a step in a process instance regardless of whether it is an active step. If you open a non–active step, the system warns you that upon step completion, you cannot use the Next Step option from the File menu. In addition, the process instance diagram will not indicate that the step is complete.

☞ **Attention:** Function Security is enabled in the Processes region of the Navigator. If your current responsibility does not have access to a form, you cannot open that form.

▶ **Completing a Step**

When a step represents a transaction updated through an Oracle Applications form, there are two ways you can complete that step:

- You can select Next Step from the File menu, or

- You can return to the Process Navigator, and with the completed step highlighted, choose the Complete button.

Use the second method for any step that does not represent a transaction based on an Oracle Applications Form.

▶ **Ending a Process Instance**

A process instance may be terminated at any time during the process without affecting any data you have entered. A process instance is automatically terminated when the last step in the process is complete. The system removes the process instance from the Process Navigator list the next time you log in. You may also choose to terminate a process instance before all of the steps are complete. To do this:

1. Select the process instance to be terminated.

2. Choose the Abort button.

Changing Your Security Access

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.

You can also change the password to your user sign–on at any time. Your system administrator may require all users to periodically change their passwords to maintain better security to Oracle Applications.

▶ **To switch your responsibility:**

1. Click in the Navigate window or choose **Navigator** from the Window menu to make the Navigate window active.

2. Choose **Switch Responsibility** from the File menu.

   If there are windows still open in your current responsibility, Oracle Applications asks you to save your changes, if there are any, before it closes those windows. You may cancel switching responsibilities by choosing Cancel in the save changes window.

   Note: The save changes window only appears if there are any changes to save. If there are no changes to save, all open windows other than the Navigate window close, and Oracle Applications displays your responsibility list.

   Note: If you have only one responsibility, the Switch Responsibility menu item is disabled.

3. Select a new responsibility from the Responsibilities window and choose **OK**.

   The Navigate window title and contents then update to reflect the new responsibility you chose.

▶ **To change your password:**

1. Click in the Navigate window or choose **Navigator** from the Window menu to make the Navigate window active.

2. Choose **Change Password...** from the Edit, Preferences menu, to display the Password Update window.

```
┌────────────────────────────────────────────────────────────────────┐
│ 🦁 Oracle Applications - Vision Corporation                  _ □ ✕  │
├────────────────────────────────────────────────────────────────────┤
│ File  Edit  View  Folder  Tools  Window  Help        ORACLE         │
├────────────────────────────────────────────────────────────────────┤
│  ⬜ ✏ ⟳ │ ⬜ 📁 🖨 ▷ │ ✂ 📋 📄 ✍ ✏ │ ✏ 🗂 🌐 📎 🔍 │ ?   │
├──────────────────────────────────────────────────────────────┐     │
│ 🦁 Password Update :::::::::::::::::::::::::::::::::::::::: ✕  │     │
│ ┌──────────────────────────────────────────────────────────┐ │     │
│ │                                                          │ │     │
│ │     Old Password    ┌────────────────────────────────┐   │ │     │
│ │                     └────────────────────────────────┘   │ │     │
│ │     New Password    ┌────────────────────────────────┐   │ │     │
│ │                     └────────────────────────────────┘   │ │     │
│ │  Re-enter New Password ┌─────────────────────────────┐   │ │     │
│ │                        └─────────────────────────────┘   │ │     │
│ │                                                          │ │     │
│ │                          ┌──────────┐  ┌──────────┐      │ │     │
│ │                          │    OK    │  │  Cancel  │      │ │     │
│ │                          └──────────┘  └──────────┘      │ │     │
│ │                                                          │ │     │
│ └──────────────────────────────────────────────────────────┘ │     │
│                                                                     │
├──────────────────────────────────────────────────────────────────  │
│ Record: 1/1      │    │   │        │      │ <OSC>        65 : 1     │
└────────────────────────────────────────────────────────────────────┘
```
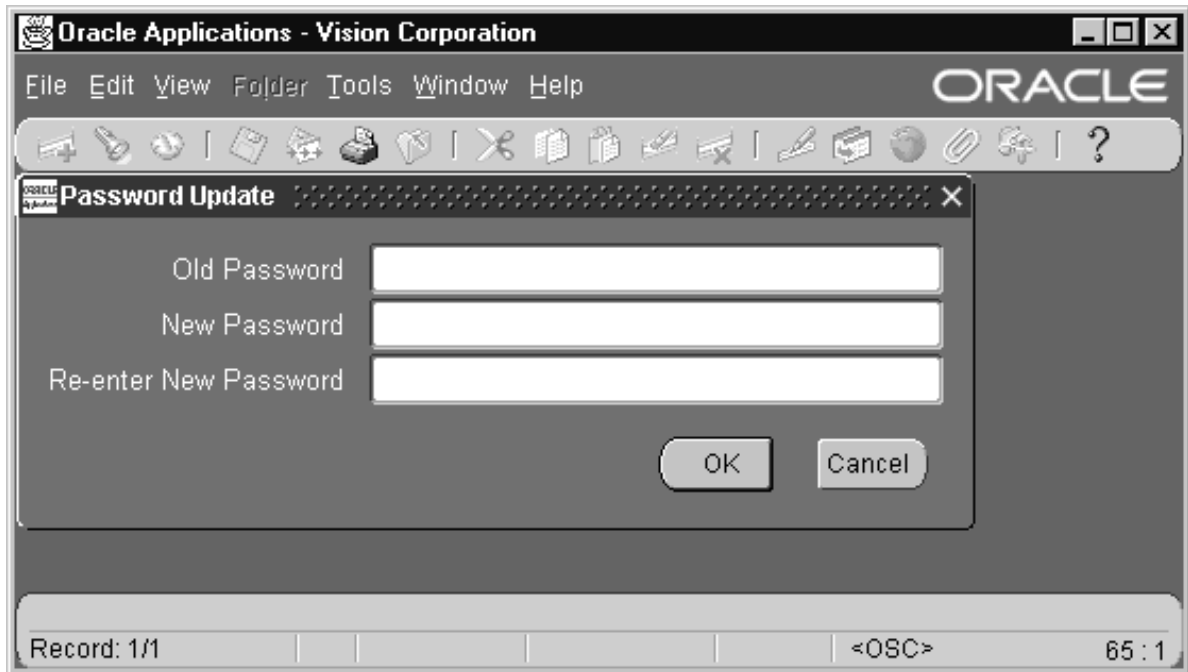
3. Enter your old password in the **Old Password** field.

4. Enter your new password in the **New Password** field.

5. Enter your new password again in the **Re–enter New Password** field.

6. Choose **OK**.

    If the second entry of your new password does not match your first, Oracle Applications asks you to re–enter your new password again, until both entries match. Your new password takes effect immediately.

    Note: If you change your mind and do not want to alter your password, choose Cancel to close the Password Update window.

Using 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

Use these menus to navigate through a form, to edit or retrieve data, or to perform various other actions.

See Also

Oracle Applications Pulldown Menu Bar: page A – 2

Right Mouse Button Menus

In addition to the Pulldown menu, using the right mouse button allows you to access the following menu items:

- Cut
- Copy
- Paste
- Folder Menu
- Help

Using Keyboard Shortcuts

Experienced Oracle Applications users can access the menu by using a *keyboard shortcut*, a specific combination of keystrokes that performs the same function as a corresponding menu item. Oracle Applications assigns many commonly used functions, such as Run Query, Save, or Clear Record to keyboard shortcuts.

You can display a list of the keyboard shortcuts that map to your computer terminal's keyboard at any time.

> **Note:** Rather than list the actual keys for a keyboard shortcut, we refer to keyboard shortcuts in this guide using the format [*Function*] where *Function* represents the function that the keyboard shortcut performs.

▶ **To display a list of keyboard shortcuts:**

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

Oracle Applications - Vision Corporation

File   Edit   View   Folder   Tools   Window   Help

ORACLE

Keys

Function	Key	
Block Menu	Ctrl+B	
Clear Block	F7	
Clear Field	F5	
Clear Form	F8	
Clear Record	F6	
Commit	Ctrl+S	
Count Query	F12	
Delete Record	Ctrl+Up	
Display Error	Shift+Ctrl+E	
Down	Down	
Duplicate Field	Shift+F5	
Duplicate Record	Shift+F6	

OK

rd: 1/1   <OSC>

2.   When you finish scrolling through the listing, choose **OK** to close the window.

Most window buttons are also mapped to keyboard shortcuts. The shortcut key is indicated with an underline in the button label. For example, in the Request Summary window, the button label Hold Request has the "H" underlined. This indicates that you can use the keyboard shortcut Alt–H to put a request on hold instead of using the mouse.

☞ **Attention:**   Depending on your GUI environment, you can also invoke menu items using keystroke combinations that are different from the keyboard shortcuts described above. For example, each

menu item is identified by a unique underlined character. You can press a function key that invokes the menu, and then type in the underlined character of the menu item you want to invoke. For example, the function key in Windows that invokes the menu is [Alt]. To choose Print... from the File menu, you enter [Alt] [F] [P], where F is underlined in **File** and P is underlined in **Print....**

See Also

Toolbar: page 2 – 10

Getting Help

Oracle Applications provides you with a complete online help facility.

Whenever you need assistance, simply choose an item from the Help menu to pinpoint the type of information you want.
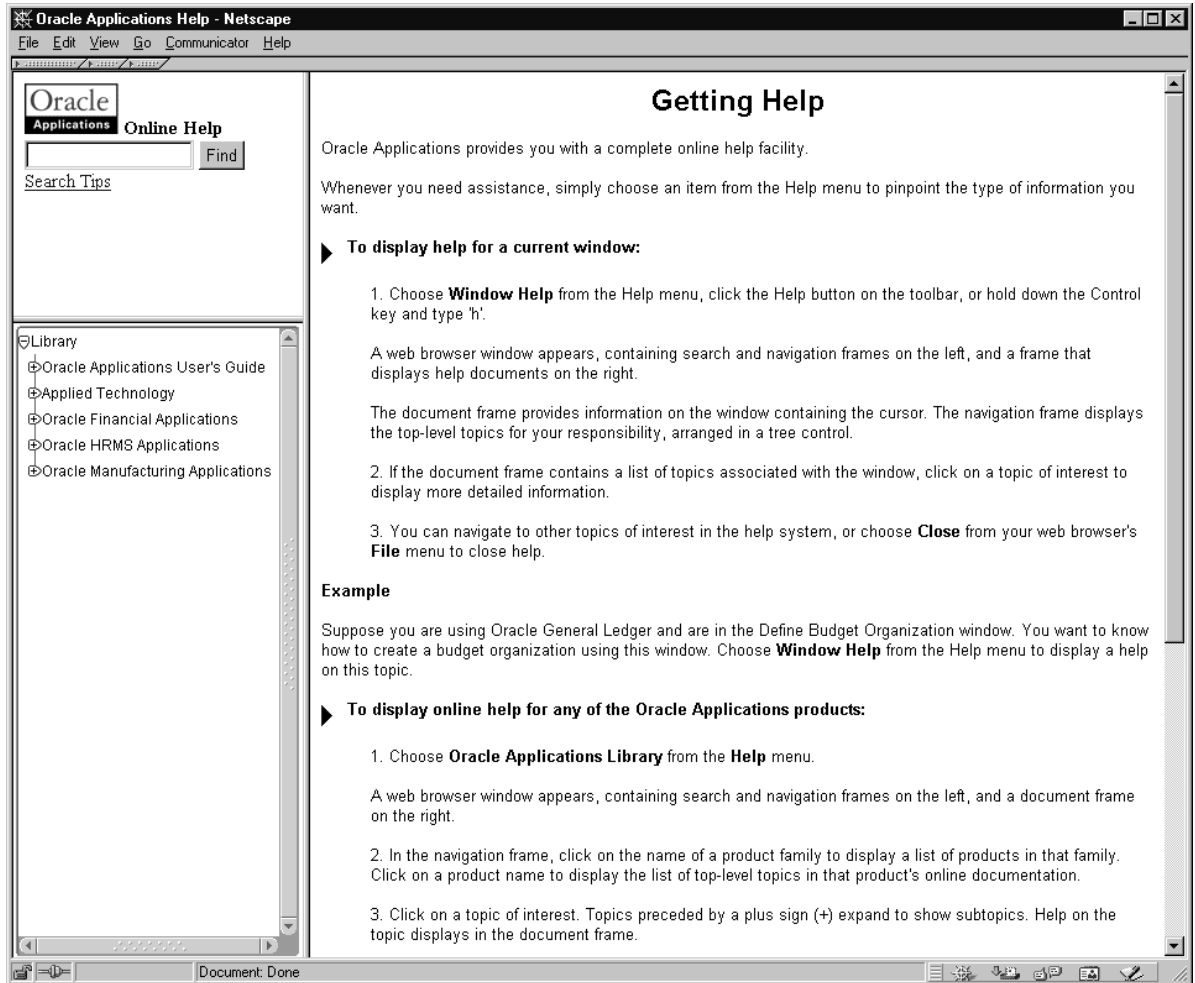
To display help for a current window:

1. Choose **Window Help** from the Help menu, click the Help button on the toolbar, or hold down the Control key and type 'h'.

A web browser window appears, containing search and navigation frames on the left, and a frame that displays help documents on the right.

The document frame provides information on the window containing the cursor. The navigation frame displays the top–level topics for your responsibility, arranged in a tree control.

2. If the document frame contains a list of topics associated with the window, click on a topic of interest to display more detailed information.

3. You can navigate to other topics of interest in the help system, or choose **Close** from your web browser's **File** menu to close help.

Example   Suppose you are using Oracle General Ledger and are in the Define Budget Organization window. You want to know how to create a budget organization using this window. Choose **Window Help** from the Help menu to display a help on this topic.

▶ **To display online help for any of the Oracle Applications products:**

1. Choose **Oracle Applications Library** from the **Help** menu.

A web browser window appears, containing search and navigation frames on the left, and a document frame on the right.

2. In the navigation frame, click on the name of a product family to display a list of products in that family. Click on a product name to display the list of top–level topics in that product's online documentation.

3. Click on a topic of interest. Topics preceded by a plus sign (+) expand to show subtopics. Help on the topic displays in the document frame.

4. To collapse sections of the tree you previously expanded, click on topics preceded by a minus sign (–).

5. When you are finished, choose **Close** from the web browser's **File** menu to close help.

> **Note:** A topic called "Library" and topics corresponding to other products and product families are often included on the navigation tree associated with a particular responsibility. These topics function in a fashion similar to the Library tree described here.

▶ **To display version information for Oracle Applications:**

1. Choose **About Oracle Applications** from the Help menu.

2. An About Oracle Applications window appears on your screen.

   The window provides details about the version of the Oracle Applications components you are using, your login information, and information about the current form you are using.

   You can supply this information to your system administrator or to Oracle Customer Support if you need to report a problem.

3. Choose **OK** to close this window.

See Also

Searching for Help

You can perform a search to find the Oracle Applications help information you want. Simply enter your query in the text field located in the top–left frame of the browser window when viewing help, then click the adjacent **Find** button.

A list of titles, ranked by relevance and linked to the documents in question, is returned from your search in the right–hand document frame. Click on whichever title seems to best answer your needs to display the complete document in this frame. If the document doesn't fully answer your questions, use your browser's **Back** button to return to the list of titles and try another.

The search syntax to use in constructing your query can be any of those shown in the following table.

Use this syntax . . .	To find files containing . . .
`term`	the word "term"
`string*`	words that **begin with** "string"
`"words, and punctuation"`	the **precise phrase** "words, and punctuation"
`term1 OR term2`	**either** term1 or term2
`term1 term2`	**either** term1 or term2
`term1 AND term2`	**both** term1 and term2
`term1 +term2`	**both** term1 and term2
`term1 AND NOT term2`	term1, **but not** term2
`term1 -term2`	term1, **but not** term2

Table 1 – 1 Help Search Syntax (Page 1 of 1)

Example   You want to know how to create a budget organization in Oracle
General Ledger. You enter `"budget organization"` in the search
field, and click **Find**. A linked list of help documents that contain this
phrase appears in the document frame. You click on one that seems
appropriate and start reading.

Exiting Oracle Applications

When you complete your work, you can choose to save or discard any unsaved work in your form(s) before exiting Oracle Applications.

▶ **To exit Oracle Applications:**

1. Choose **Exit Oracle Applications** from the File menu**.**

   If there are no changes to save in your window or windows, Oracle Applications asks you to confirm your exit.

2. Choose **OK** to exit Oracle Applications and return to your desktop.

   If there are recent changes that you have not yet saved, a window appears as shown:
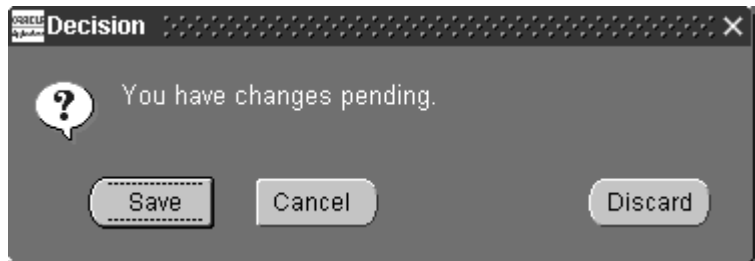
3. Choose **Save** to save the changes before exiting. Choose **Discard** to exit without saving any changes. Choose **Cancel** to close this window and cancel the exit.

   Note: You will be asked once for each form that is currently open and has changes pending.

See Also

Closing Multiple Windows: page 2 – 20

Oracle Applications User Interface Basics

This chapter introduces you to the anatomy of the Oracle Applications user interface and teaches you a few simple concepts and functions you need to start working with Oracle Applications. Specifically, this chapter describes how to:

- Navigate around Oracle Applications
- Use window functions
- Interpret message explanations
- Access linked forms
- Export data to a spreadsheet

Oracle Applications User Interface

To use Oracle Applications effectively, you need to understand the components that make up its user interface. The following major components and terms will be discussed and illustrated in this chapter:

- screen
- window
- window title
- Oracle Applications window
- title bar
- modal window
- form
- block
- field
- region
- record
- current record indicator
- message line
- status line
- toolbar
- tabbed region
- master–detail relations
- drill–down indicator
- combination block

For information on features for disabled users see Oracle Applications Accessibility Features: page C – 2.

Components of the User Interface

The following figures show Oracle Applications running in a Browser window, displaying windows typically seen when submitting a single request. The various user interface components are identified on these figures.
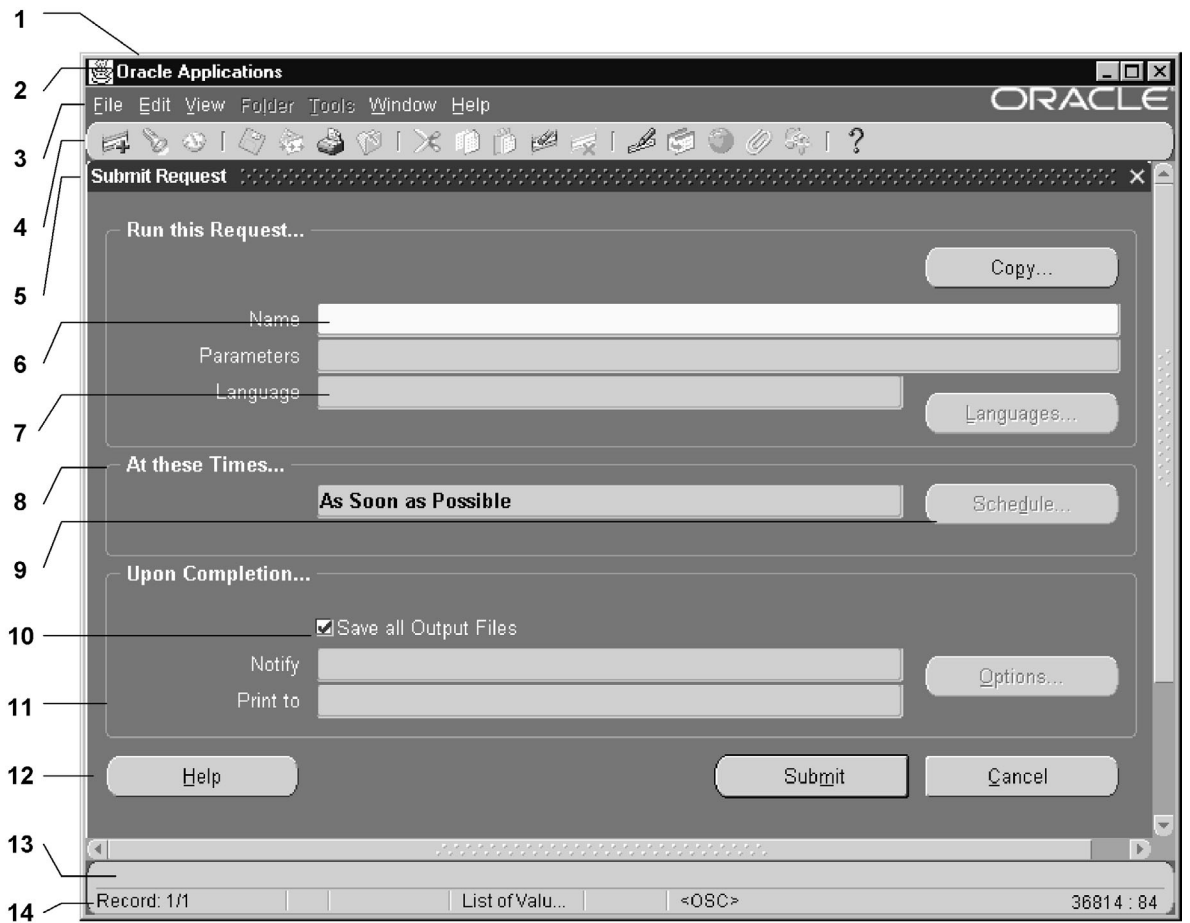
1. Oracle Applications Window
2. Title Bar
3. Menu
4. Toolbar
5. Window Title
6. Required Field
7. Field (display only)
8. Region Title
9. Disabled Button

10. Checkbox

11. Region Border

12. Button (enabled)

13. Message Line

14. Status Line
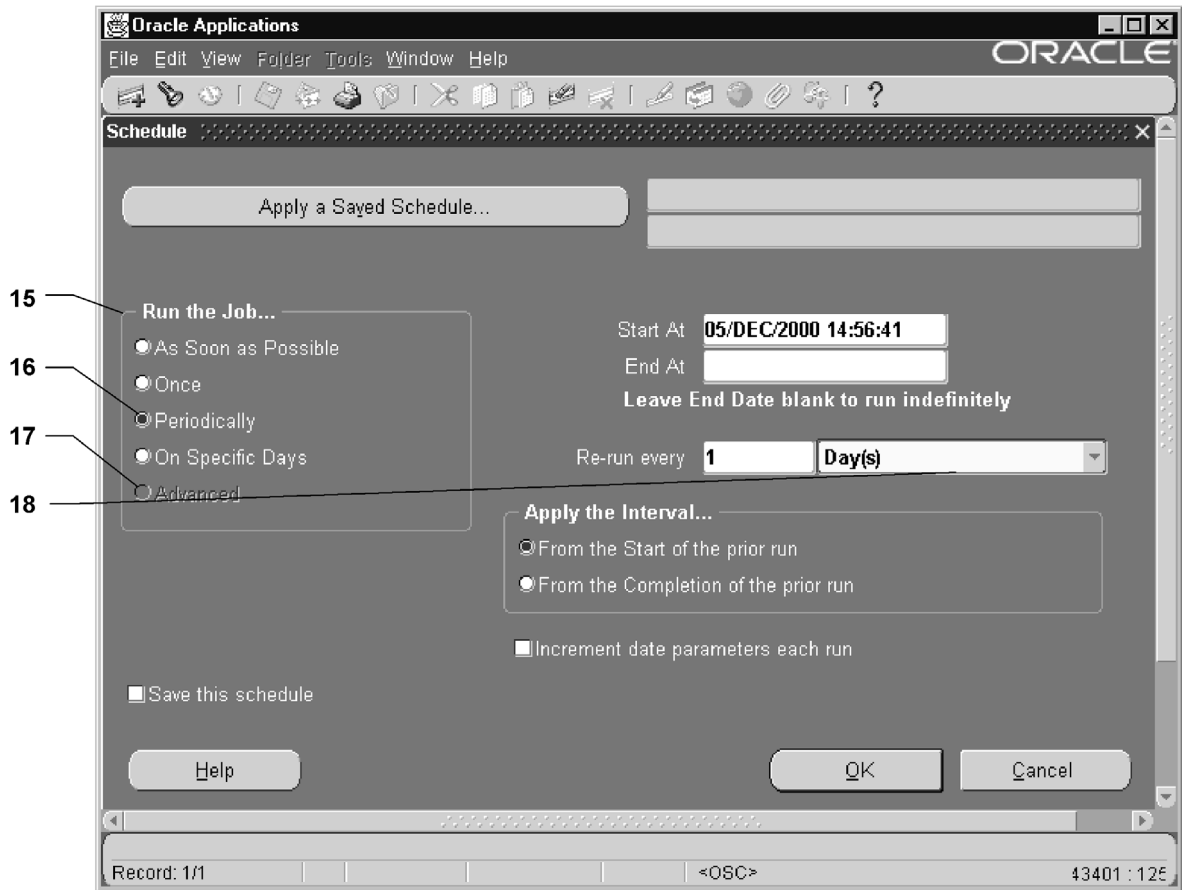
15. Option Group

16. Selected Option

17. Disabled Option

18. Poplist

Requests					
Refresh Data		**Find Requests**		Submit a New Request...	

Request ID	Parent				
Name		Phase	Status	Parameters	
650736 Statement Generation Pr		Completed	Normal	PRINT, 1001, 2280, 2195, 1282, , N,	
650730 Cash Forecasting by GL		Completed	Normal	8950, LKA1PU01, , , Accounting, N	
650721 Cash Forecasting by GL		Completed	Normal	8950, LKA1PB01, , , Accounting, N	
650707 Cash Forecasting by Day		Completed	Normal	8949, LKA1DU01, , , 1999/11/01 00:0	
650704 Cash Forecast Report		Completed	Normal	8949, 12477	
650703 Cash Forecast Execution		Completed	Normal	12477	
650699 Cash Forecasting by Day		Completed	Normal	8949, LKA1DB01, , , 1999/11/01 00:0	
650681 Statement Generation Pr		Completed	Normal	PRINT, 1000, 1000, 1003, 1347, , N,	
650680 Statement Generation Pr		Completed	Normal	PRINT, 1000, 1000, 1003, 1347, , N,	
650663 Statement Generation Pr		Completed	Normal	DRAFT, 1000, 1000, 1000, , 2000/12/	

Hold Request	View Details...	View Output
Cancel Request	Diagnostics	View Log...

19. Current Record Indicator (If the record allows drill–down the Current Record Indicator is twice as wide.)

20. Scroll Bar

Screen

A *screen* represents the part of your computer monitor that displays information. A screen is also referred to as a desktop.

Window

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, appear adjacent to, or on top of each other. You can move a window to a different location on your screen.

Window Title

A *window title* at the top of each window indicates the name of the window, and occasionally, context information pertinent to the contents

of the window. The context information, which is contained in parentheses, can include the organization, set of books, or business group that the window contents is associated with.

Oracle Applications Window

Every session of Oracle Applications is displayed in a special window called the *Oracle Applications window.* The Oracle Applications window displays form windows and common elements such as the main menu bar, toolbar, status and message lines. The appearance of the Oracle Applications window may vary depending on the Browser you use.

Title Bar

Across the top of the Oracle Applications window is the Title Bar. The title contains the Oracle Applications title and the icons for minimize, maximize, and close.

Modal Window

Certain actions that you perform in Oracle Applications may cause a *modal window* to display. A modal window requires you to act on its contents before you can continue, usually by choosing OK or Cancel. Examples of modal windows include the list window, the field editor window, or any error or message window that may appear.

Form

A *form* is an organized display of fields through which you can quickly and easily access and enter information to complete a business task. When you use the Navigate window in Oracle Applications, you navigate to a form. Each form displays one or more windows and maps to a complete business or task flow. Note that a given window can appear in more than one form if it accomplishes a task that is part of more than one business flow.

The forms you can navigate to depend on the responsibility you choose when you sign on to Oracle Applications. A form in one responsibility may vary from the same form in another responsibility, such that certain windows or buttons may exist in one but not the other. This enables your organization to maintain security at a functional level so that only a user with a given responsibility can access a particular set of functions (for example, windows or buttons). Overview of Function Security, *Oracle Applications System Administrator's Guide.*

Block

Every Oracle Applications window consists of one or more *blocks.* A block contains information pertaining to a specific business entity. All required fields in a block must be completed before you can move to the next block. Generally, the first or only block in a window assumes the name of the window. Otherwise, a block name appears across the top of the block with a horizontal line marking the beginning of the block.

Field

Each block contains *fields* you use to enter, view, update, or delete information. A *field prompt* describes each field by telling you what kind of information appears in the field or what kind of information you should enter in the field. Fields are color coded to indicate their type.

White Fields – allow data entry

White Fields with Green Underlined Text – indicate drill–down capability

Yellow Fields – require data entry

Gray Fields with Black Text – are display–only

Gray Fields with Gray Text – are disabled

Blue Fields – indicate fields to use in Query–Enter mode

The term *field* generally refers to a text field, an area in a window that either displays data or allows you to enter data. However, a field can also include the following:

button—You choose a button to initiate a predefined action. A button is usually labeled with text to describe its action or it can be an icon whose image illustrates its action.

A button can be enabled or disabled. A button is disabled when its function is not currently available. A disabled button is distunguised by the lightened appearance of its label.

check box—You can indicate an on/off or yes/no state for a value by checking or unchecking its check box.

option group—An option group is a set of option buttons. You can choose only one option button in an option group at a time, and the option group takes on that button's value after you choose it. An option button or option group is also referred to as a *radio button* or

radio group, respectively, using the metaphor of a car radio's station buttons.
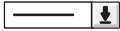
poplist—A poplist lets you choose a single value from a short list. To choose a value, click on the poplist to display the list of choices, then drag your mouse through the list to the desired value. Release your mouse button to choose the value you highlight and display it in the poplist field. A poplist is also sometimes known as a *list*.

Region

A *region* is a collection of logically–related fields set apart from other fields by a horizontal line across the window or a rectangular box. Each block can optionally contain one or more regions. Regions help to organize the information within a block.

A *scrollable region* is a region whose contents are not entirely visible in a window. A scrollable region contains a horizontal or vertical **scroll bar** so that you can scroll horizontally or vertically to view additional fields hidden in the region. In addition, if a field is partially hidden you can scroll the region to fully display the field by clicking on the partially hidden field.

Record

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 either corresponds to one row of data in a database table or one logical transaction.

The Submit Request window is an example of a *single–record block*. To view the next record of information, use the down arrows on your keyboard. The up arrow takes you to the previous record.

The Requests window, by contrast, displays up to ten records of information simultaneously, with each record representing a request submitted from the Submit Request window. The Requests window contains fields arranged on the screen horizontally adjacent to each other, leaving enough space in the window to display up to ten records of information beneath the field headings. The Requests window is an example of a *multi–record block*.

The fields in a multi–record block appear as columns. You can use the vertical scroll bar located to the left of the first column to view any additional records hidden in that block.

Current Record Indicator

Multi–record blocks often display a *current record indicator* to the left of each record. A current record indicator is a one character field that when filled in, identifies a record as being the current or "active" record.
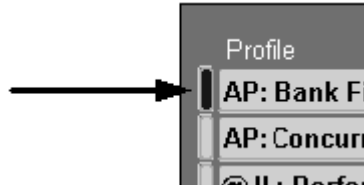
Sometimes, a current record indicator appears as a two character–wide field, indicating that the current multi–record block supports a capability called *drill–down*. Drill–down lets you click on a current record indicator to navigate directly to another window that displays either details of the current record or information related to the current record. See: Combination Block: page 2 – 14.

Message Line

The *message line* near the bottom of the Oracle Applications window displays helpful hints or messages when you encounter a minor error. See: Interpreting Messages: page 2 – 21.

Status Line

Figure 2 – 1
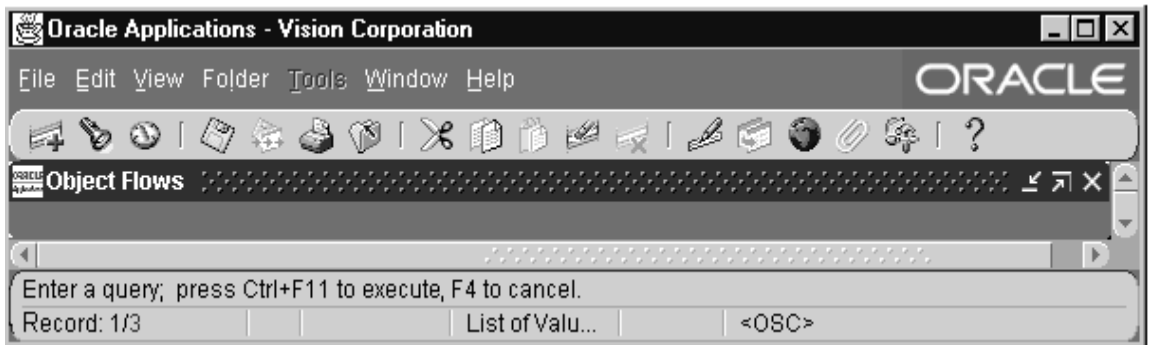
The *status line* appearing below the message line of a Oracle Applications window displays status information about the current window or field. A status line can contain the following:

- **Record: 1/3**—this example indicates that the current record is one of three records in the current block. If an undetermined number of records have been retrieved, the message will appear as 1/?.

- **Enter–Query**—this phrase indicates that the current block is in Enter Query mode, so that you can specify search criteria for a query.

- **List of Values**—this lamp appears when a list of values is available for the current field.

See Also

Using a List of Values: page 3 – 9

Searching for Information: page 3 – 19

Toolbar

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. You can display help for an enabled toolbar button by holding your mouse over the button.

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

The **New** icon opens a new record in the active form.

The **Find...** icon displays the Find window to retrieve records.

The **Show Navigator** icon displays the Navigator window.

The **Save** icon saves any pending changes in the active form.

The **Next Step** icon updates the Process workflow in the Navigator by advancing to the next step in the process.

The **Print...** icon prints the current screen that the cursor is in. In some cases it may print a report associated with the current data.

The **Close Form** icon closes all windows of the current form.

The **Cut** icon cuts the current selection to the clipboard.

The **Copy** icon copies current selection to the clipboard.

The **Paste** icon pastes from the clipboard into the current field.

The **Clear Record** icon erases the current record from the window.

The **Delete** icon deletes the current record from the database.

The **Edit Field...** icon displays the Editor window for the current field.

The **Zoom** icon invokes customer–defined Zoom (drill–down behavior).

The **Translations...** icon invokes the Translations window.

The **Attachments...** icon invokes the Attachments window. If one or more attachments already exist, the icon changes to a paper clip on a piece of paper.

The **Folder Tools** icon displays the folder tool palette.

The **Window Help** – icon displays help for the current window.

Tabbed Regions

A *tabbed region* is one of a collection of regions that occupy the same space in a window where only one region can be displayed at any time. Each tab displayed in a window represents a different region. You can view a tabbed region by clicking on the tab displaying the name that represents it. The region updates to display the fields of the tab region you choose.

Master–Detail Relations

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

When two blocks are linked by a master–detail relation:

- the detail block displays only those records that are associated with the current (master) record in the master block

- querying between the two blocks is always coordinated

- usually you cannot enter information in the detail window until you have selected a master record.

For example, when you display a different record in a master block, the detail block displays the detail record(s) that correspond to the new master record. Similarly, if you perform a search in a master block, the detail block displays the detail record(s) associated with the master record that was retrieved from the search.

Master and detail blocks can often appear in the same window or they can each appear in separate windows. When in separate windows an unlabeled *coordination check box* appears in the upper right corner of the detail block window. This check box lets you decide whether to constantly update the coordination of records between a master and a detail window when the detail window is open in the background.

Figure 2 – 2
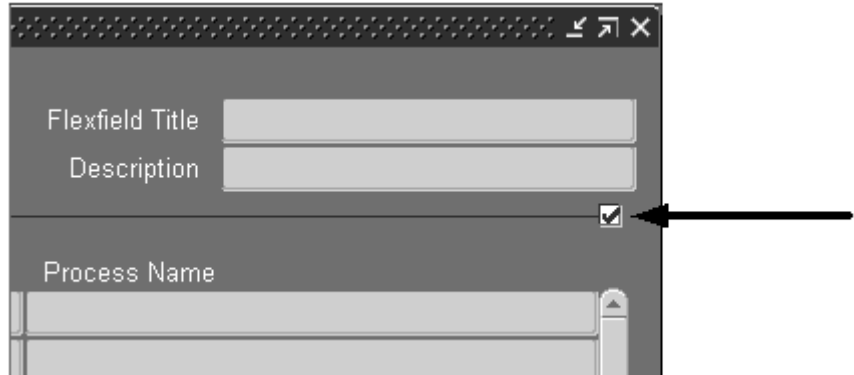
For example, suppose you have a master and a detail window, and the detail window displays records that pertain to the current record in the master window. If you uncheck the coordination check box and then display another record in the master window, the detail window clears itself and does not display any data until you move your cursor into the detail window. At that point, it displays the detail record(s) that match the current master record. If you check the coordination check box and display another record in the master window, the detail window automatically refreshes to display the detail record(s) that match the current master record.

> **Note:** When you first open a detail window or when you query a new record in the master window, the detail window always updates to display the detail record that matches the current master record regardless of whether the coordination check box is checked or unchecked.

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.

Combination Blocks

Although a multi–record block shows you several records at once, it usually does so at the expense of showing you fewer fields for each record or only having some of the fields visible simultaneously. A *combination block* gives you the benefits of both multi–record and single–record blocks by displaying the fields of a record in both multi–record (summary) and single–record (detail) formats. Each format appears in its own separate window that you can easily navigate between.

When you first navigate to a combination block, a summary window appears. You can select a record in the summary window and choose **Summary/Detail** from the View menu to display the detail window for that record. This menu item lets you switch back and forth between the two windows which are always coordinated to show the same record.

You can also drill down from the summary window to the detail window for a record by clicking on the record's current record indicator. To return to the summary window, simply choose the Summary⁄Detail menu item. See: Current Record Indicator: page 2 – 9.

Navigating in Oracle Applications

To accomplish a business task in Oracle Applications, you need to know how to navigate around Oracle Applications. There are several types of navigation you can perform. You can navigate:

- within a window
- between windows
- to another form
- to a custom form

Navigating Within a Window

▶ **To navigate within a window:**

■ Choose one of the following three methods:

- move the cursor with your mouse
- choose an appropriate menu item
- enter an appropriate keyboard shortcut

The table below illustrates the default menu and keyboard shortcut methods you can use to navigate around the records, fields, and blocks of an Oracle Applications window.

Window Navigation Functions

Function Type	Function	Menu Item	Keyboard Shortcut
Record	View Previous		[Up Arrow]
Record	View Next		[Down Arrow]
Record	View First	View–>Record–>First	

Table 2 – 1   (Page 1 of 2)

Function Type	Function	Menu Item	Keyboard Shortcut
Record	View Last	View–>Record–>Last	
Field	Go to Previous		[Shift]–[Tab]
Field	Go to Next		[Tab]
Field	Go to Next (From a Multi–Line Text Item)		[Ctrl]–[tab]
Block	View Previous	View–>Block–>Previous	[Ctrl]–[Page Up]
Block	View Next	View–>Block–>Next	[Ctrl]–[Page Down]

Table 2 – 1   (Page 2 of 2)

Note: You can navigate to a display only field using your mouse.

Note: The keyboard shortcuts mappings outlined in the Window Navigation Functions table are the default mappings and may be different if your System Administrator modifies your Oracle Terminal Settings.

Suggestion: You can choose Next or Previous from the View–>Block menu to help you distinguish between the blocks and regions in a window, since blocks and regions can have a similar appearance.

Suggestion: If you are working in a window and accidentally press a wrong key or button that prevents you from further navigation, you can choose Clear–>Record from the Edit menu, to undo your changes in the window and begin again.

Attention: Whereas [Tab] moves you between fields, pressing [Enter] selects the default button in the window (if there is a default). If you try using [Enter] to navigate between fields, you may unintentionally activate the default button.

Attention: If a large number (more than 100) records are queried, View–>Record–>Last will retrieve 100 records then open a decision window prompting you to either:

Stop – Displays the last record of the records retrieved.

Continue to End – Retreives all records queried and displays the last record of the query.

Continue – Retreives the next 100 records and repeats the decision window unless all records have been retrieved. If all records have been retrieved then the last record will be displayed

Navigating Between Windows

In a GUI environment, you can navigate between the windows of an application by simply choosing a specific window with your mouse. This, however, can be inconvenient if you have many overlapping windows where you have to move or close one or more windows before you can find the window of interest.

▶ **To navigate between the open windows of an application:**

■ Click on the desired window.

■ Choose the name of the window you want to navigate to from the Window menu.

The Window menu automatically lists all the titles of the windows that are currently open in Oracle Applications.

Navigating to Another Form

To open another form in your application use the Navigate window. The Navigate window is always available during a session.

▶ **To navigate to another form in an application:**

■ If the Navigate window is hidden behind another window or is minimized, choose **Show Navigator** from the View menu or **Navigator** from the Window menu.

See Also

Navigating to a Custom–Defined Form

You can create a custom form to use with Oracle Applications and define a *zoom* that takes you from a specific Oracle Applications form or window to your custom form.

> **Note:** This entry is only enabled if you have coded a *zoom* for the current form or block.

▶ **To zoom to a custom form:**

■ Choose **Zoom** from the View menu.

See Also

Zoom: page 2 – 22

Using Window Functions

As you use Oracle Applications, you may find a need to perform any of the following miscellaneous window functions:

- printing a window
- saving your work
- closing multiple windows

Printing a Window

You can print an image of a current window at any time.

▶   **To print a current window:**

1. Choose **Print...** from the File menu.

2. A consecutive series of modal windows appear. In general, the windows prompt you for information such as the printer to print to, size of image to print, orientation to print, number of copies to print, format to save the image to if you want to save it to a file, and so on. Enter the necessary information in these windows.

   Refer to your Microsoft Windows documentation for information on how to install printer drivers and define printers.

3. Another window appears that tells you Oracle Applications is about to capture the image of your window and that you should not move or obstruct the window you want to print. Choose **OK** and wait for the image capture to complete.

4. A final window appears to confirm that the image capture is complete. Choose **OK**.

☞   **Attention:**   In some screens of Oracle Applications the **Print...** action may display a dialog that allows you to print specific reports in addition to the current window.

Saving Your Work

When you save your work, Oracle Applications updates the underlying database with the work you have done and then informs you that the transaction is complete. Saving your work is sometimes referred to as saving a change or a transaction.

Oracle Applications always validates your work upon saving it. If any of the data you enter is invalid or missing, Oracle Applications provides you with a message describing the problem and does not save your work.

▶ **To save your work:**

■ Choose **Save** from the File menu.

▶ **To save your work and update the process in the navigator:**

■ Choose **Save and Proceed** from the File menu to save any changes you have made to the current window(s) and advance the current position indicator for the process in the navigator.

Closing a Form

▶ **To close a form:**

• Choose **Close Form** from the File menu.

• Check **Close Other Forms** in the Navigate window and navigate to another form.

• Choose **Close** from the control menu for that window.

• Exit the application by choosing **Exit Oracle Applications** from the File menu.

Note: When you close the initial window of a form, all of it's related windows close also.

Interpreting Messages

When your application needs to give you a hint or a basic error (such as the current field is not updatable) it displays a short message in the message line located at the bottom of the applications window.

When your application needs to inform you of something more significant (such as you entered fewer than five characters when changing your password) it displays an error dialog. Choose **OK** to close the error dialog.
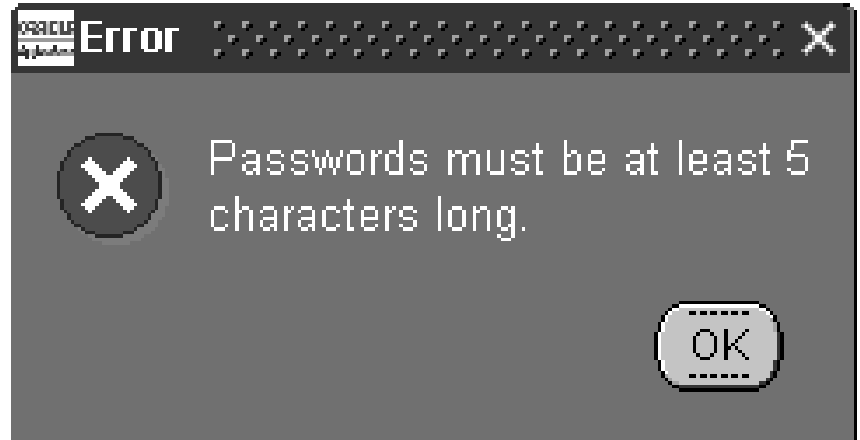
A **Details...** button may also appear in the error window if an error of a more serious nature occurs. Choose **Details...** to view more details about the current error and about recent errors you got in other error windows. Your application saves a history of your five most recent error messages and displays them when you choose **Details...**.

> **Note:** After you view you error history, the next error will start a new blank history list. It also clears previous messages when you change your responsibility.

☞ **Attention:** Often, messages and errors are preceded by a message or error code. Codes that contain the preface FRM– arise from Oracle Forms, the underlying product that provides Oracle Applications with its graphical user interface. Codes that contain the preface ORA– arise from the Oracle database. Codes that contain the preface APP– arise from Oracle Applications. These codes help your system administrator or Oracle Customer Support expert diagnose the errors you may encounter.

Linked Forms

In certain cases, it is useful to be able to access one form directly from another. For example, it may be very convenient to be able to open the Customers form directly from the Sales Orders form, to allow entry of a new customer while creating a new order, or to view information about a customer that has already been defined. From within certain forms you can open another form directly by using the Tools menu or, depending on how Oracle Applications has been customized at your site, by choosing **Zoom** from the View menu.

Tools Menu

In some Oracle Applications windows, related inquiry or entry forms may be available from the Tools menu. Depending on how many of these related forms are linked, they may be available directly as entries on the Tools menu or by choosing the **Go To...** entry from the Tools menu. Look in the Tools menu of the window you are in or check the Reference Guide of the product you are using to see if the above options are available.

Zoom

In certain cases, you may be able to access one form directly from another by choosing **Zoom** from the View menu. Oracle Applications ship with no Zooms defined, and the Zoom entry on the View menu is disabled. When this feature is available and how it behaves are determined by how Oracle Applications is customized at your site.

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. Additionally, if you are exporting from a Folder form, you can reorder columns in the form or remove unwanted columns before you export.

▶ **To start the export process:**

1. Query the records you want to export.

    Note: To reduce the time required to export your records, reduce the number of records returned by using explicit query criteria.

2. Make sure that your cursor is in the Multi–row block that contains the records to be exported.

3. If you are exporting information from a Folder form, you can use the folder tools to reorder columns, select which columns to display, and customize column prompts. These customizations will be maintained when you export the data.

4. Choose **Export...** from the File menu.

Exporting Large Numbers of Records

Export automatically selects all records currently retrieved, as well as the remaining records associated with the current query. If the records retrieved exceed 100, you will be prompted to:

Stop   Limits the records available to be exported to those already selected by the export process. You will then be prompted to either cancel the export, or export only those records already selected. The number of records selected is included in the decision window.

Continue to End Allows the export process to select all records retrieved in the form. When all records retrieved have been selected the export process will automatically export the records.

    Note: We recommend that you do not use the export feature for very large numbers of records, such as numbers that exceed

1000, as this is time consuming, and uses significant machine and network resources.

Continue Will select the next 100 records. When all records retrieved have been selected the export process will automatically export the records. Otherwise, you will continue to be prompted until all records are selected or you choose Stop or Continue to End.

Hierarchy Screen

The Hierarchy Screen contains an Object Navigator that allows you to navigate through your flow data. The following describes the elements of the Menu Structure and Toolbar Structure.

Menu Structure

File Menu

Exit	Exits from the Object Navigator.
Print...	Prints the current hierarchy to a printer.

Edit Menu

Preferences	Allows the user to set default color, font, and icon settings for all nodes displayed within the Object Navigator. (Refer to Sample Screen – Preferences for more details)
Type Display	Allows the user to assign color and icons to a specific type of node. (Refer to Sample Screen – Type Display for more details)

View Menu

Horizontal	Displays hierarchy in an Organizational Chart style. The parent node will start in the middle of the screen. Child nodes will branch out from under the parent in a root–like fashion.
Vertical	Displays hierarchy in a Microsoft Windows Explorer style. The parent node will start from the upper left corner of the screen. Child nodes will be displayed below the parent and slightly indented to the right.
Column	Displays hierarchy in a hybrid style of Horizontal and Vertical. The parent node will start in the upper left corner of the screen. Child nodes will be

		displayed in a column to the right of the parent node.
Toolbar		Allows the user to display or hide the toolbar.
Node Type		Allows the user to display or hide the type of node information for all nodes in the Hierarchy pane.

Help Menu

Using Object Navigator	Allows the user to view html help on the Object Navigator. The first help could be a "table of contents" type page that gives the users an overview of all the help topics available for the Object Navigator.
Selected Node Descriptions	Allows the User to view node information for any selected node.
Debug Information	Allows the users to turn debug information on or off. Currently, Object Navigator supports debugging the values returned by from the akquery engine. These values are displayed on a screen. Similar support will be provided by the new Object Navigator.
About Object Navigator	Allows the user to view the current version number of the Object Navigator as well as other miscellaneous information.

Toolbar Structure

Use the Printer icon to print the current hierarchy.

Use the Vertical Style icon to display nodes in a vertical tree–style hierarchy. The parent node will start from the upper left corner of the

screen. Child nodes will be displayed below the parent and slightly indented to the right.

Use the Org–Chart Style icon to display nodes in a horizontal Organization Chart style. The parent node will start in the middle of the screen. Child nodes will branch out from under the parent in a root–like fashion.

Use the Interleaved Style icon allows to display nodes in a hybrid style of Horizontal and Vertical. The parent node will start in the upper left corner of the screen. Child nodes will be displayed in a column to the right of the parent node.

Entering and Querying Data

T his chapter discusses features that help you enter and query data from Oracle Applications. Specifically, this chapter describes how:

- To use editing functions
- To use a list of values to simplify your data entry
- To enter a date using the Calendar
- To search for information

Using Editing Functions

To enter or update data in a form, you can use the following field and record editing functions:

- cutting, copying, and pasting text
- clearing data
- duplicating data from a previous record
- creating and deleting records
- displaying a list of values for a field
- invoking a field editor
- getting information about a record

Many of these editing functions are listed on the Edit menu of the main menu bar.

See Also

Edit Menu: page A – 3

Using a List of Values: page 3 – 9

Overview of Flexfields: page 5 – 2

Entering Data into Flexfields: page 5 – 10

Cutting, Copying, and Pasting Text in a Field

You can choose Cut, Copy, or Paste from the Edit menu to manipulate data in fields.

▶ **To cut, copy, and paste data in a field:**

1. Select the data in a field. You can either drag your mouse over the data or double–click on the data to highlight and select it. When you tab to a text field the data is automatically selected and ready to cut or copy.

2. Choose **Cut** or **Copy** from the Edit menu to cut or copy the selected data. Cut is only available if the field can be updated.

   Note that Cut is like Copy, except Cut also removes the data from the field.

3. Move your cursor to another field, then choose **Paste** from the Edit menu to paste the cut or copied data into the current field.

Clearing Data

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. Note however, that if the data is new and has never been saved to the database, it will be lost permanently when you clear it from the screen.

▶ **To clear selected data from a field:**

■ Choose **Clear, Field** from the Edit menu.

Note that the data you clear from the field is not available for pasting into another field. Choose **Cut** from the Edit menu if you want to paste the data elsewhere.

The Clear Field function is not available for fields that cannot be updated.

▶ **To clear a record of data:**

■ Choose **Clear, Record** from the Edit menu.

This action erases the values in all the fields of your current record and returns your cursor to the first field of the prior record.

Suggestion: If you are in a window that you do not want to be in or you accidentally perform an unwanted action, you can use **Clear, Record** from the Edit menu to clear the current record and begin again.

▶ **To clear data from the current block:**

■ Choose **Clear, Block** from the Edit menu.

When completed, this action returns your cursor to the first field in the current block. Note that if the current block is a multi–record block, this action erases all records displayed in the block. If any changes are pending you will be asked for confirmation before the records are erased.

Attention: If you enter data in only some of the fields in a block or window, you must first choose Clear, Record from the Edit menu to clear the partial record before choosing Clear Form.

▶ **To clear all data from a form:**

■ Choose **Clear, Form** from the Edit menu.

After this action erases the data from all the fields of the current form, it returns your cursor to the first field of the form.

Duplicating Data From a Previous Record

To save time during data entry, you can duplicate data from a previous record if much of the data needs to be repeated in a new record.

▶ **To copy a field value from the previous record:**

1. Enter a new record or query an existing record in your form.

2. Navigate to the field whose value you want to duplicate in the new record.

3. Choose **Duplicate, Field Above** from the Edit menu to copy the field value from the previous record to the current record.

▶ **To copy all field values from the previous record (when available):**

1. Enter a new record or query an existing record in your form.

2. Choose **New** from the File menu to insert a new record after the existing record.

3. Choose **Duplicate, Record Above** from the Edit menu.

☞ **Attention:** If your current block requires all records to be unique, the Duplicate Record Above menu item may not duplicate those fields that must be unique.

Also, the Duplicate, Field Above and Duplicate, Record Above menu items are not available if there is no previous record, that is, if you are currently on the first record of a block.

See Also

Saving Your Work: page 2 – 19

Searching for Information: page 3 – 19

Creating and Deleting Records

You can enter new records in the database or delete existing records from the database.

▶ **To create a new record:**

1. Choose **New** from the File menu.

   When you select this menu item in a multi–record block, Oracle Applications moves the current record down and inserts a new blank row. You add a new record simply by filling in this blank row.

   When you choose New Record in a single–record block, Oracle Applications displays a blank record in the current block so you can enter data for a new record.

2. When you finish entering the data for your new record, choose **Save** or **Save and Proceed** from the File menu to save the record to the database.

▶ **To delete a record from the database:**

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

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

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

☞ **Attention:** If you exit Oracle Applications without saving your work, the record does not get deleted from the database.

Creating Translations for a Record

You can enter translated values for specific records in the database or update existing records in the database. You can identify windows where translations are allowed by the enabled translation icon.

▶ **To enter a translation for a record:**

1. Select the record you wish to translate.

2. Choose the Translation icon from the Toolbar.

This action opens the Translations window. When you open the translations window, the fields that can be translated are displayed in a multi-record block as columns. You may need to use the scrollbar to see all of the columns. Each row represents an installed language version of the Applications. The source language represents the original language version of the applications used to enter the data record.

3. Enter the translation for the appropriate fields.

4. Choose **OK**

    Suggestion: The translation method described above allows you to enter translations for multiple languages at once. An alternative translation method may be more effective if you need to enter translations only for the language in which you are working. In this case, you can type the translation directly into the field rather than clicking on the translation icon and working in the translation window.

    If you choose to enter a translation directly into a field, you need to be aware of which fields are allowed to be translated. If you type into a field that was not meant to be translated, you will overwrite the source language, and your translation will be the only entry for that field. All users will see the data in the language you input, and the original language will be lost. If

you have any doubt about a field, click on the translation icon to identify whether it is translatable.

Invoking an Editor for a Field

You can display an Editor window to view, enter, or update the entire contents of a text field. The Editor window is especially useful for editing scrollable text fields. A scrollable text field is a field whose actual width is longer than its display width and whose content you can view by scrolling through the field.

▶ **To use the Editor window for a field:**

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

2. Enter a new value or edit the existing value in the Editor window.

☞ **Attention:** If the current field is a display–only field, then the Editor window does not allow changes.

3. To search for a phrase and replace it with another phrase, you can choose **Search** in the Editor window to display a Search/Replace window.

4. Enter a value in the **Search for:** field, and if you want to replace that value with another value, enter a value in the **Replace with:** field.

5. Choose **Search** to search for the value, or choose **Replace** or **Replace All** to search for the value and replace the first occurrence or all occurrences with your new value, respectively.

6. Choose **Cancel** to close the Search/Replace window.

7. When you are satisfied with the value in the Editor window, choose **OK** to close the window and insert the value into the field.

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. You can also

learn who last changed the record using Oracle Applications, the date
of change, and that user's system logon and terminal information.

▶ **To learn about the current record:**

1. Choose **Record History** from the Help menu.

    A window appears that shows you information about the current
    record.
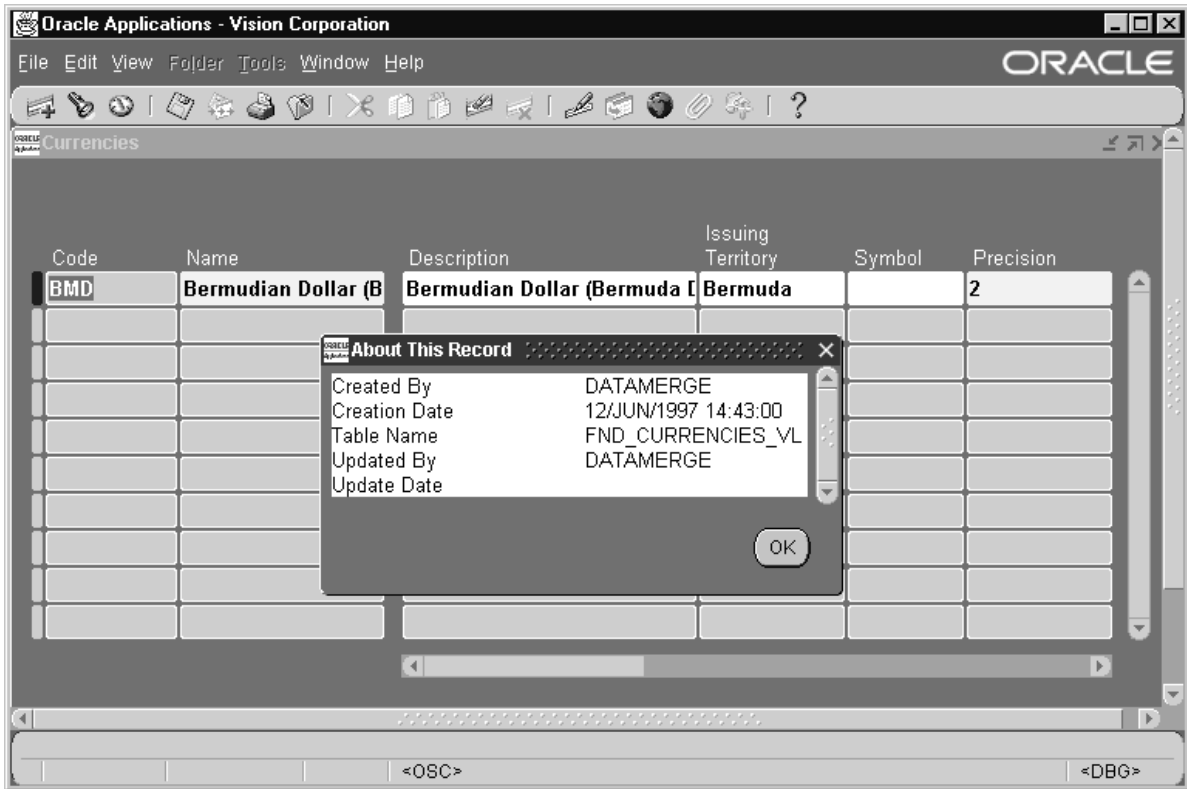
2. Choose **OK** to close the window.

Using a List of Values

A *list of values* provides you with a powerful, easy–to–use data entry method that increases your accuracy and productivity. A list of values makes data entry an easy task for novice users, and lets power users enter correct data with a minimum number of keystrokes.

Oracle Applications tells you when a list of acceptable input values is available for a field by displaying the LOV icon next to the current field. When you display a list, the values appear in a window with a title that describes the contents.

> **Note:** The list that we describe here differs from the list associated with a poplist field. You identify a poplist field by its special poplist icon. You identify a text field containing a list of values by the LOV icon displayed next to the field when your cursor is in that text field.

Basic Business Needs

A list of values provides you with the features you need to satisfy the following basic data entry needs:

- Enter data quickly and easily without having to memorize or look up valid data for each field. You can choose data from an online list of acceptable input choices whenever you wish.

- Rely upon Oracle Applications to validate your input during data entry. When you enter incorrect data, you know right away so that you can make appropriate corrections.

Major List Features

AutoSelection

A list of values offers a feature called AutoSelection that lets you choose a valid value from the list with a single keystroke. When you display the list window, you can type the first character of the choice you want in the window. If only one choice begins with the character you enter, AutsoSelection selects the choice, closes the list window, and enters the value in the appropriate field.

AutoReduction

In addition to AutoSelection, you can also use a feature called AutoReduction to help you further simplify and accelerate your data entry. For example, you might want to shorten a list so that you only have to scan a subset of values before choosing a final value. Type in the list window, the first character or characters of the subset you want. If there are several values that match, AutoReduction shortens the list to just those matching values.

To expand a reduced list of choices in a list window, simply press [Backspace]. Just as AutoReduction incrementally reduces a list of values as you enter additional character(s), pressing [Backspace] incrementally expands a list.

Any time you reduce the list to a single entry, AutoSelection selects the entry and enters it into the appropriate field for you.
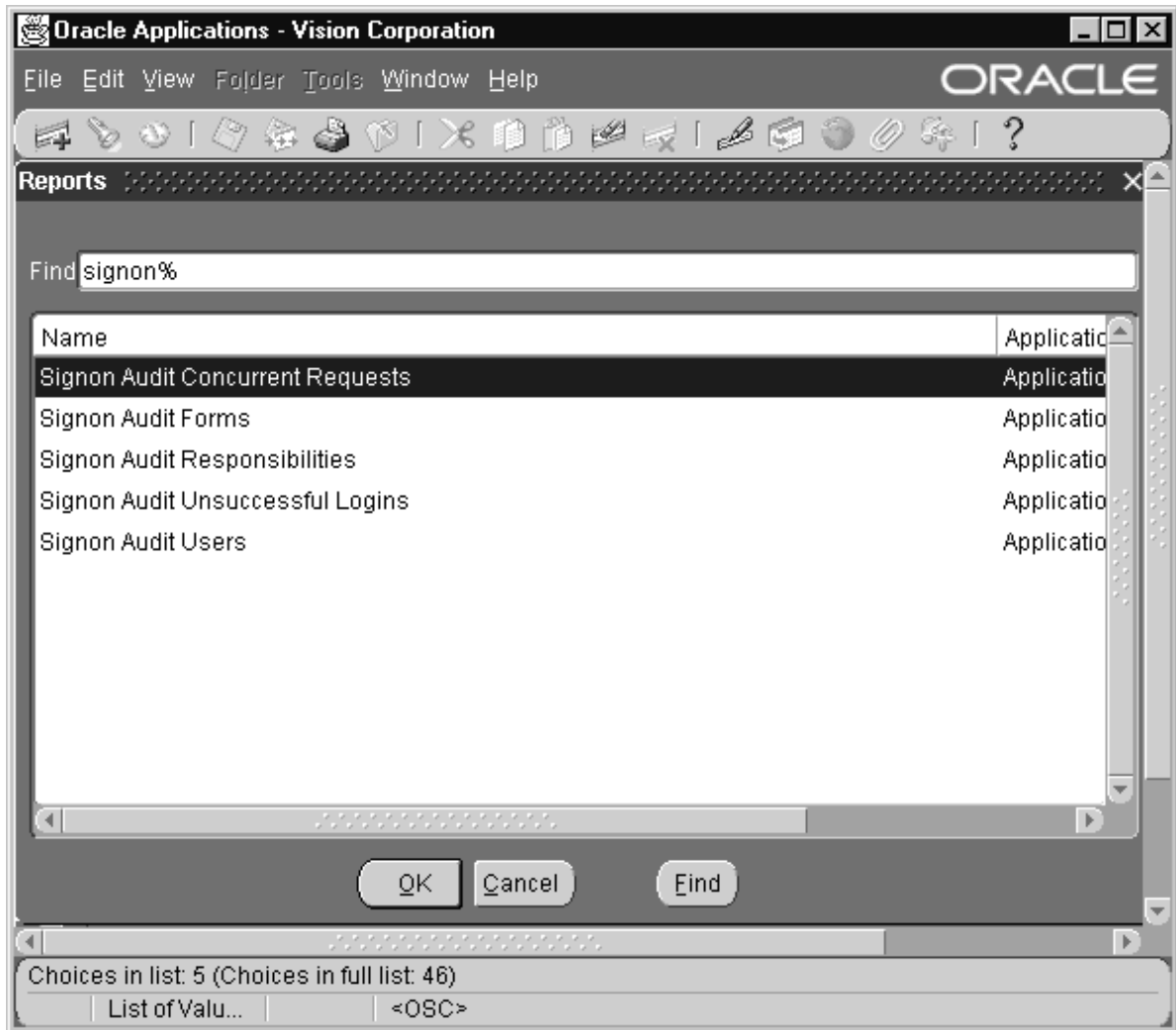
List Search

You can use AutoReduction to reduce a list when you know the first few characters of your choice. If you do not know the initial characters of your choice, but you do know that your choice contains a certain word or set of characters, you can perform a list search to reduce the list.

In the list window, enter any group of characters as search criterion in the Find field and choose Find. You can use wildcard characters such as the percent sign [%], which represents any number of characters, or an underline [_], which represents a single character, in your search criterion.
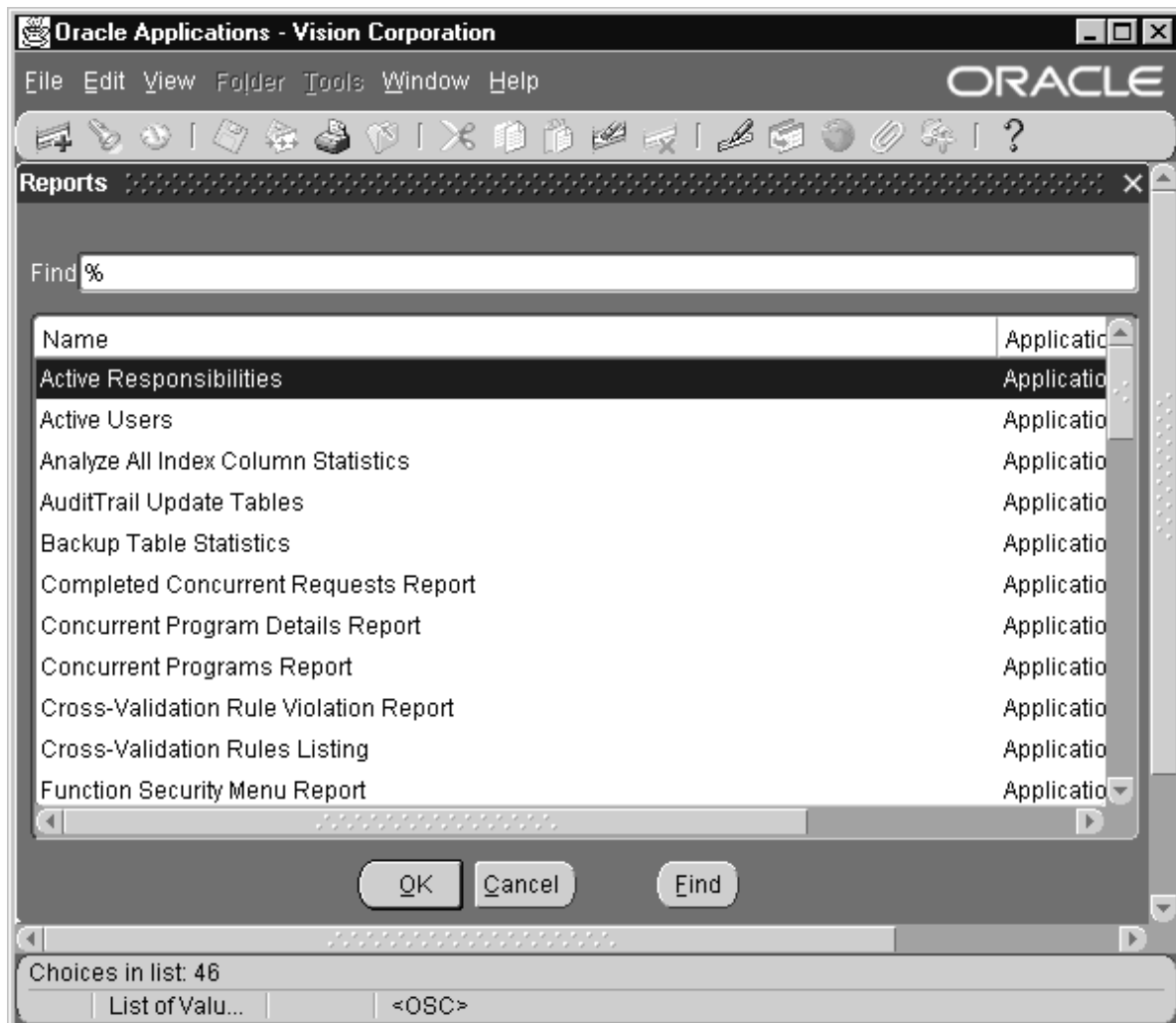
For example, the list window shown above lists available reports for you to choose. To reduce the above list to just those choices that begin with the word "signon," enter *signon%* in the **Find** field and click the **Find** button. A reduced list appears, displaying just those choices that begin with the word "signon," as shown below.

```
┌─────────────────────────────────────────────────────────────────────┐
│ 🖼 Oracle Applications - Vision Corporation                  _ □ ☒ │
├─────────────────────────────────────────────────────────────────────┤
│ File  Edit  View  Folder  Tools  Window  Help        ORACLE         │
│ ┌───────────────────────────────────────────────────────────────┐   │
│ │ 🖼 🔧 ⊙ │ 🗋 ☆ 🖨 🔖 │ ✂ 🗐 🗎 ▨ 🗑 │ ✍ 🗃 🌐 📎 ✂ │ ? │
├─────────────────────────────────────────────────────────────────────┤
│ Reports ░░░░░░░░░░░░░░░░░░░░░░░░░░░░░░░░░░░░░░░░░░░░░░░░░░░░░░░░ ✕  │
│                                                                       │
│  Find │signon%                                              │        │
│                                                                       │
│  ┌─────────────────────────────────────────────────┬───────────┐    │
│  │ Name                                             │ Applicatio│▲   │
│  ├─────────────────────────────────────────────────┼───────────┤    │
│  │ Signon Audit Concurrent Requests                 │ Applicatio│    │
│  │ Signon Audit Forms                               │ Applicatio│    │
│  │ Signon Audit Responsibilities                    │ Applicatio│    │
│  │ Signon Audit Unsuccessful Logins                 │ Applicatio│    │
│  │ Signon Audit Users                               │ Applicatio│    │
│  │                                                  │           │    │
│  │                                                  │           │▼   │
│  └─◀─────────────────────────────────────────────────────────▶─┘    │
│                                                                       │
│          ( OK )   ( Cancel )      ( Find )                            │
│  ◀────────────────────────────────────────────────────────────▶     │
├─────────────────────────────────────────────────────────────────────┤
│ Choices in list: 5 (Choices in full list: 46)                        │
│      │  List of Valu...  │          <OSC>                            │
└─────────────────────────────────────────────────────────────────────┘
```

☞　　**Attention:** The phrase you enter for a list search is not case–sensitive.

LongList

If a field has a *longlist*, that is, it typically has a list of more than 100 values, Oracle Applications displays the list window with no choices listed, and includes the message "Enter a partial value to limit the list, % to see all values." An example is shown below.
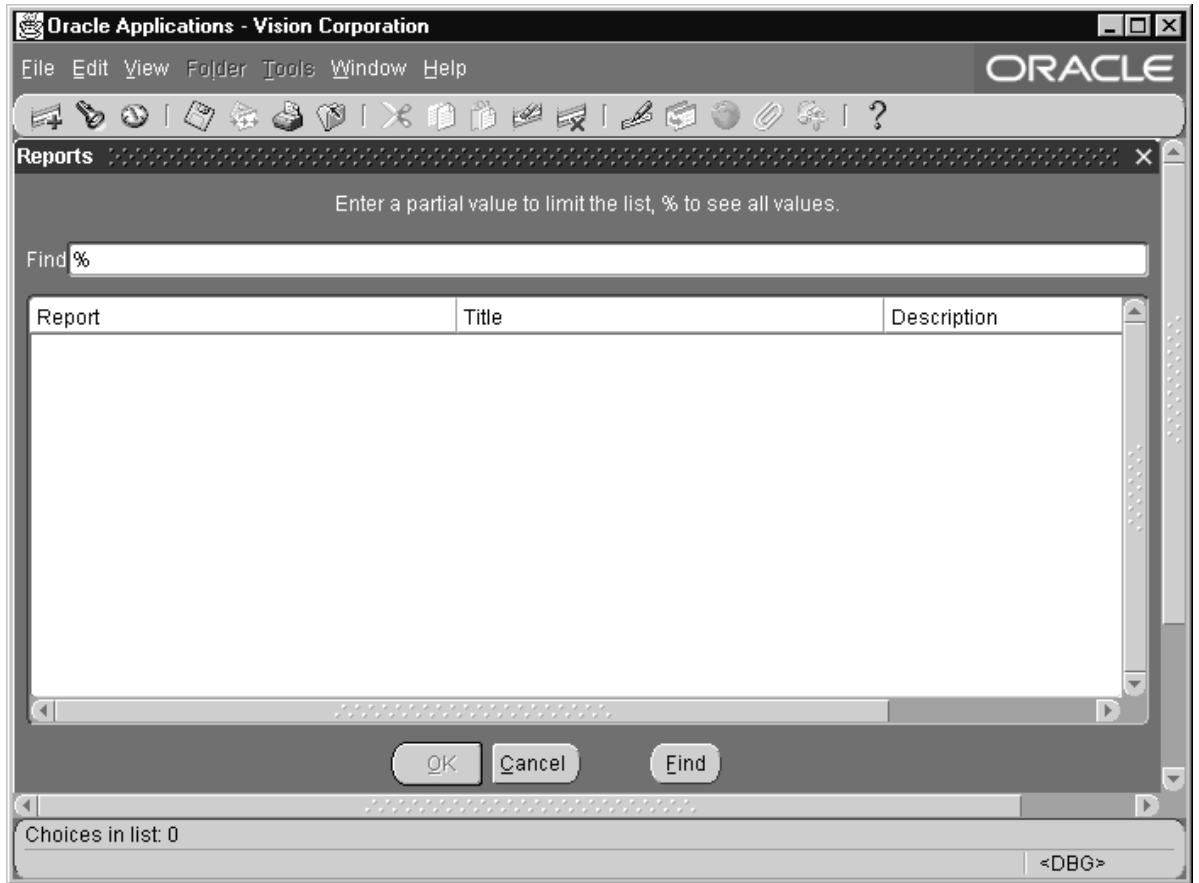
Since it takes less time to display a reduced list than a complete longlist, Oracle Applications prompts you to enter the first few characters that occur in your value of interest to reduce the complete list. The partial value you enter can also include wildcard characters.

If you have to view the entire longlist, you can enter % at the prompt to display all the values.

☞ **Attention:** To avoid excessive network traffic and reduced performance, try to enter criteria other than just "%" whenever possible.

Power List

Power list provides an even faster method of data entry. If a field displays a <List of Values> lamp and you know the value you want, simply enter the first few characters of the value in the field and press

[Tab] to let Power list complete the entry for you. You can also include wildcard characters with the characters you enter. You do not have to display the list window.

If more than one value matches the characters you specify, a list window containing those values appears. If no values match the characters you enter, an error message is displayed on the message line.

Choosing a Value from a List

When you display a list of values, you may notice that some list windows display one column of information while others display more. All list windows, however, provide a descriptive heading at the top of each column. Below each heading is a list of choices.

▶ **To choose a value from a list:**

1. Click on the LOV icon next to the field to display a list of possible values.

2. You can reduce the length of a list using one of two methods:

    • Without clicking in the **Find** field, type the first character(s) of a value to *autoreduce* the list to just those values in the first column that match the characters you enter. Press **[Backspace]** to undo an autoreduction. If you autoreduce the list to a single value, the list window closes and inserts the final value in the current field.

    • Search for a value in the first column of a list by clicking in the **Find** field and then entering search criteria in the **Find** field and choosing the **Find** button. If the search finds a single value, the list window closes and inserts the value in the field. If the search finds several values, you can perform a more specific search or use one of the methods described in step 3 to choose a specific value from the reduced list.

3. You can also choose a value directly from the list using one of three methods:

    • Use your mouse to scroll through the list and double–click on a value to choose it.

    • Use your mouse to scroll through the list and single–click on a value and then press OK to choose it.

- Move your cursor into the list window and press **[Up Arrow]** or **[Down Arrow]** to select a value, and press **[Return]** to choose the selected value.

4. Once you choose a value, the list window closes and inserts the value into the current field.

5. If you want to close a list window without choosing a value, choose **Cancel**.

Modifying a List

You define new values or delete existing values in a list by editing the data in the form that stores the source of values for the list. Consult the reference guide for your Oracle Applications product to identify the form that contains the source of values for a specific list.

For example, in your Oracle General Ledger application, the list of values that appears in the Source field of the Suspense Accounts form come from the journal source values entered in the Journal Sources form.

Applying Standards to a List

To take full advantage of all Oracle Applications features, including a list of values, remember the importance of standards. For example, you should follow consistent, helpful naming conventions when you enter a value in a "list source" field. Where possible, use source values whose initial letters are unique to best take advantage of Power list. Similarly, develop names with memorable key words or groups of characters to help simplify your search through a list window.

Using the Calendar to Enter Dates

Use the calendar to enter a value. If your date field also supports time, you can also use the Calendar window to choose a valid time with the date.

Basic Business Needs

The Calendar lets you satisfy the following business needs:

- Represent dates and time graphically so that you can make a quick date and time selection without additional typing.

- Select only those dates or date ranges that are appropriate for the current field.

Using the Calendar Window

When you navigate to a date field it displays an LOV icon. You can use the Calendar window, as shown in Figure 3 – 1, to help you enter a date.

Figure 3 – 1
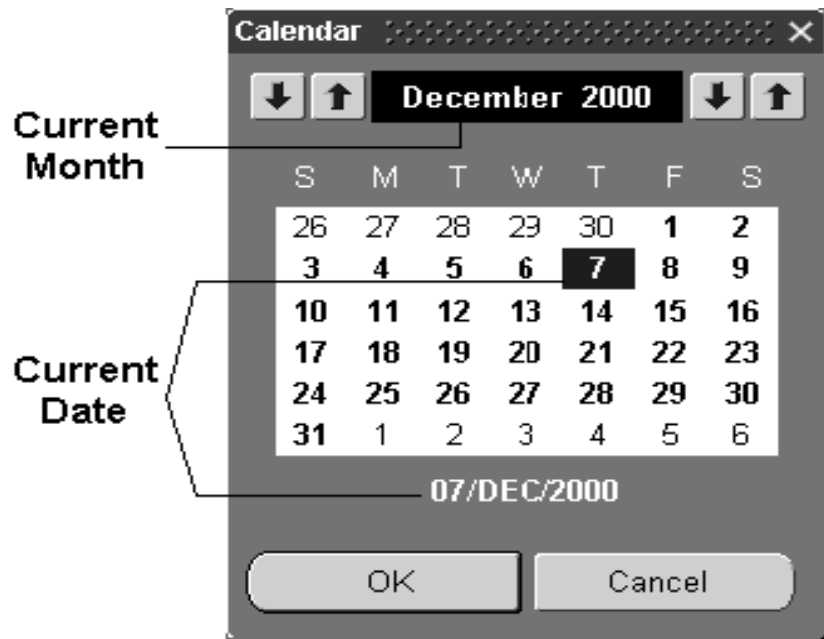
▶ **To choose a date in the Calendar window:**

1. When your cursor is in a date field, choose the **List of Values...** icon to display the Calendar window.

   The date value that appears below the calendar is called the *selected date.* If the current field already contains a date, that date appears as the selected date, otherwise the selected date reflects a value determined by the current field or by the current system date.

2. To display the next or previous month, click on the right arrow or left arrow buttons in the upper left corner of the window, respectively. You can also press **[Down arrow]** or **[Up arrow]** on your keyboard to display the next or previous month.

   The days of the displayed month appear with bold text, while the days of the previous and next months appear with light text.

3. To display the next or previous year, click on the right arrow or left arrow button in the upper right corner of the window, respectively. You can also press **[Next Record]** or **[Previous Record]** on your keyboard to display the next or previous year, respectively.

   Suggestion: To quickly display the current month and year in the calendar, click on the month and year display located above the calendar.

4. Click on a date to choose a day.

   The day you select appears in a box.

   Attention: Disabled buttons that show dimmed text represent invalid days. You cannot choose an invalid day. Similarly, if a date field is display–only, you can display the Calendar window for the field, but you cannot change the date shown on the calendar. The Cancel button is only shown if you can change the date value.

5. Choose **OK** to accept the selected date and close the window. Choose **Cancel** if you want to close the window without choosing a date.

▶ **To choose a date and time in the Calendar window:**

1. Follow steps 1 through 4 in the section above to choose a date. If the current field supports both date and time, the Calendar window includes additional time items. Hour and Minute poplists are displayed at the bottom of the window, with AM and PM option buttons, as shown in Figure 3 – 2.

Figure 3 – 2
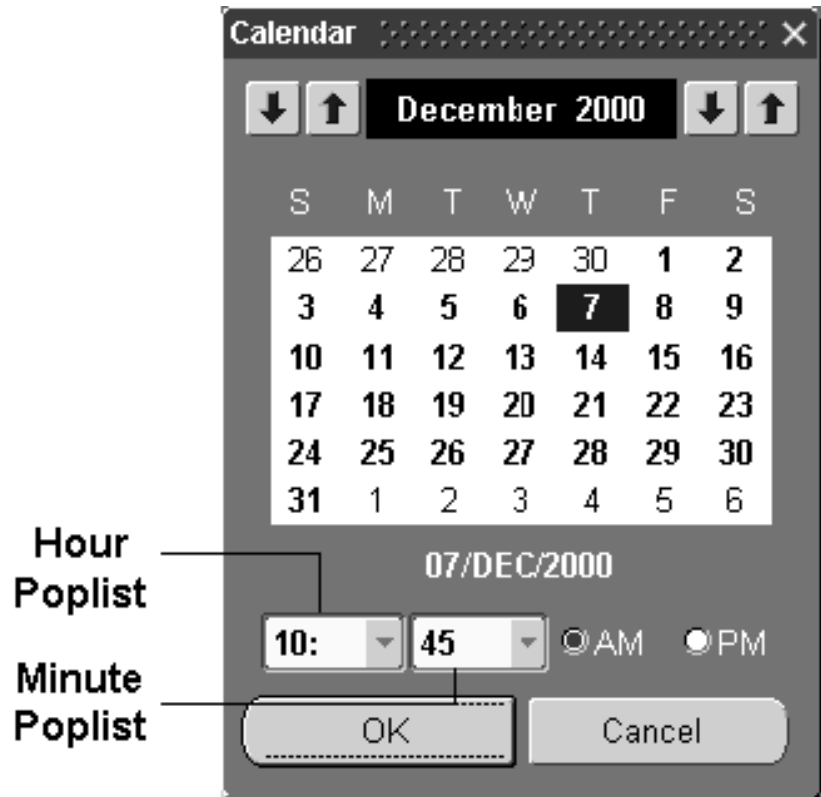
2. Select the hour poplist icon to choose an hour between 1 and 12.

3. Select the minute poplist icon to choose a minute value. The minute poplist displays twelve values between 00 to 55 at 5 minute increments.

☞ **Attention:** If a value already exists in the current date and time field when you display the Calendar window, and the minute value is not a 5 minute increment, then the minute poplist displays thirteen values to include the minute value displayed in the field.

For example, if the current field displays the time 13:16:00, then the minute poplist includes the twelve values from 00 to 55 at 5 minute increments plus the value 16.

4. Choose **AM** or **PM**.

5. Choose **OK** to accept the selected date and time and close the window. Choose **Cancel** if you want to close the window without choosing a date and time.

Searching for Information

Oracle Applications provides you with easy–to–use search capabilities to access application information. You can quickly retrieve and review all available information in your database without having to remember the information displayed in windows, or print lengthy reports to see the data. Instead, you can simply run a search to obtain the information you want and review the data online in the same window used to enter the data.

This section describes the two methods you can use to search and retrieve records in a window:

- Query Find

- Query–by–example

In addition, this section also describes a type of window that lets you immediately query records for review or editing:

- Direct entry windows

  Note: We use the words *search* and *query* interchangeably to describe the retrieval of records.

  Note: Some windows cannot be searched because they display only run–time output or they can only be used to submit or run specific processes. An example is the Run Requests window. Your application displays a helpful message in the message line if you attempt to search in such a window.

See Also

Overview of Flexfields: page 5 – 2

Searching for Data Using Flexfield Criteria: page 5 – 21

Basic Business Needs

Oracle Applications lets you satisfy the following basic information search needs:

- Have instant, online access to all of your application information. You can find information quickly and easily, without having to use a complex query language.

- Search for a specific record or for a group of records based on criteria you enter before executing the search. You can retrieve

this information directly, without having to review all the
information in your application database.

- Search for information using criteria of different types or lengths,
  including a single letter, a single word, a group of characters, or
  anything else you wish to enter.

- Find out how much information is available that matches your
  search criteria before running the search. Otherwise, you might
  waste both computer time and your time should your search for
  a single piece of information yield 10,000 responses. This feature
  is available only when using query–by–example.

Using Query Find

If you want to query for records in your current block or window, the
simplest way to proceed is to use *Query Find*. Query Find displays a
window that lets you specify search criteria. Depending on the block
that you invoke Query Find from, one of two types of windows
appears:

- A *Find* window that contains fields for entering search criteria.
  These fields are specific to the current block and often validate
  the search criteria you enter against a list of valid values.

  An example is the Find Requests window, shown below. This
  window gives you the option of finding your completed
  requests, your requests in progress, all your requests, or specific
  requests. If you choose Specific Requests, you are given
  additional selection options, such as Request ID and Name. This
  window also provides a poplist for you to select a sort order.

Figure 3 – 3

- A list window, as shown in Figure 3 – 4, that shows all the possible records that you can retrieve for the block. The example shows the Find Key Flexfield list window.

Figure 3 – 4

Generally, a Find window appears for those blocks that display multiple records. A list window generally appears for those blocks that display one record at a time.

▶ **To use Query Find:**

1. Choose **Find...** from the View menu.

2. If a list window appears, select the record you want to retrieve and choose **OK** to retrieve the record into your current block.

3. If a Find window appears, enter your search criteria in the appropriate fields.

   If a field does not provide a list of values for you to choose from, you may enter wildcard characters in the search phrase. You cannot, however, use query operators (such as >, <, etc.) in a Find window.

4. Choose **OK** to find any matching records.

Performing Query–by–Example and Query Count

If you want to retrieve a group of records based on more sophisticated search criteria than what Query Find allows, you can use a feature called *query–by–example*. As an expert user you can use query–by–example to specify complex search criteria in any of the queryable fields in your current block. Queryable fields are displayed with a green background when you envoke query–by–example. The search criteria can include specific values, phrases containing wildcard characters, and/or phrases containing query operators to help you pinpoint the data of interest.

In addition, if you do not actually need to retrieve the records from a query–by–example search, but only want to know how many records match your search criteria, you can perform a query count to save yourself some time.

Matching Exact Values

In some cases you want to search for information that matches exact values in one or more fields. For example, suppose you want to search for a budget named FY90 in the Define Budget window of your Oracle General Ledger application. Simply enter the value **FY90** in the Name

field. You should be precise in your use of uppercase and lowercase, since "fy90" is not always equivalent to "FY90" in query–by–example mode (some fields may not have case–insensitive query).

Finding Patterns With Wildcards

Include wildcard characters in your search criteria to search for particular patterns in your data. You can use the percent '%' wildcard within a field to represent any number of characters (including no characters), or use the underline '_' wildcard to represent any single character. For example, if you want to retrieve all records that contain the word "Central" in a specific field, you would enter the search criterion **%Central%** in that field.

Using Query Operators

Use query operators in your search criteria to restrict your search to the information you need. The query operators you can use in most fields, their meanings, and example expressions are shown in the following table:

Query Operators

Operator	Meaning	Example Expression
=	equals	= 'Janet', = 107
!=	is not	!= 'Bob', = 109
>	greater than	> 99.1, > '01–JAN–93'
>=	at least	>= 55
<	less than	< 1000.00
<=	at most	<= 100
#BETWEEN	between two values	#BETWEEN 1 AND 1000

Table 3 – 1 Query Operators (Page 1 of 1)

☞ **Attention:** If your field contains character or date values and you are using operators, you must enclose the character or date value in your expression in single quotes as shown in the above examples.

☞ **Attention:** You cannot use query operators on time fields.

☞ **Attention:** When you use the #BETWEEN query operator, the search criterion "#BETWEEN *value1* AND *value2*" retrieves all records containing values between and including *value1* and *value2*. For example, the search criterion "#BETWEEN '01–JAN–93' AND '01–MAR–93'" entered in a date field retrieves all records with dates between and including 01–JAN–93 and 01–MAR–93.

The query operator expressions retrieve results according to character ordering rules for character fields and numeric ordering rules for numeric fields. For example, suppose you have the following field values:

```
002, 003, 004, 005, 078, 123,
253, 441, 576, 775, 1274, 3298,
4451, 5600, 9578, 10500, 58437, 70845
```

These values are shown in the order you expect for numeric values, where 005 is between 004 and 078. If the field is defined as a numeric field, then the phrase "#BETWEEN 004 AND 078" would retrieve 004, 005, and 078. However, if the field is a defined as a character field, then the phrase "#BETWEEN 4 AND 7" would retrieve the values 441, 576, 4451, 5600, and 58437, which all start with characters between 4 and 7. The values 775 and 005 would not appear because 775 is lexically greater than 7, and 0 is lexically less than 4.

Some fields contain date values that are actually "Date–format" character values. These fields behave like character fields, such that the value 01–FEB–92 would be lexically less than 01–JAN–92, because F precedes J in a character set.

Sometimes you cannot instantly tell if a field containing numeric values is defined as a character or numeric field. To identify what the field type is, you may have to enter and experiment with different search criteria expressions to see what results get returned.

▶ **To use query–by–example:**

1. Choose **Enter** from the View, Query by Example menu.

   This action switches your window from data entry mode to Enter Query mode, as indicated by the Enter Query message that appears in the status line.

2. Enter search criteria in any of the fields, using wildcard characters and/or query operators as necessary. You can also choose **Show Last Criteria** from the View, Query by Example menu to display the search criteria used in your last search if there was one.

☞ **Attention:**   In Enter Query mode, all check boxes are in a null state; that is, they are neither checked nor unchecked, although they may appear checked or unchecked as a default. If you want your search criteria to include a checked check box, you have to explicitly check it, regardless of whether it initially appears to be checked. Similarly, if you want your search criteria to include an unchecked check box, you have to explicitly uncheck it, regardless of what it initially appears as.

3. Choose **Run** from the View, Query by Example menu to perform the search.

☞ **Attention:**   To retrieve all the database records for a block, you can bypass 1 and 2 and simply choose **Run** from the View, Query by Example menu. This is referred to as a *blind query.* You can also retrieve all the records for a block by choosing **Find All** from the View, Query by Example menu.

4. Choose **Cancel** from the View, Query by Example menu if you want to cancel from Enter Query mode.

▶ **To obtain a query count:**

1. Perform steps 1 and 2 above.

2. Choose **Count Matching Records** from the View, Query by Example menu to display on the message line the number of records query–by–example would retrieve if you ran the search.

☞ **Attention:**   If you simply choose Count Matching Records from the View, Query by Example menu without specifying any search criteria in a block, query count displays the total number of records in the database for that block.

See Also

Using Query Find: page 3 – 20

Reviewing Records

After you perform a search, Oracle Applications retrieves any records that match your search criteria. The status line shows a count of the number of retrieved records currently displayed in the block and may also display a question mark (?) if there are more retrieved records not yet shown.

▶ **To review retrieved records:**

1. If the status line indicates that there are additional records with either a number other that one or a question mark (?), press the [Down arrow] key to display the next retrieved record.

2. Press the [Up arrow] key to see a previous record.

3. Use **First** or **Last** from the View, Record menu to move the cursor to either the first or last record in the block.

4. In multi–row blocks you can use the scroll bar to view additional records currently not visible on the screen.

Using a Direct Entry Window to Retrieve a Record

Some Oracle Applications products use special windows called *direct entry windows* to help you retrieve records of interest. A direct entry window consists of a master block and a detail block with a Find button on the master block.

▶ **To retrieve records in a direct entry window:**

1. Enter values in the fields of the master block by using the list of values associated with each field.

2. Choose the Find button in that window to retrieve all the detail records that correspond to the values you enter in the master block.

Selecting Multiple Records

Some Oracle Applications enable you to take an action on several records at once. These records are presented in a multi–record block where you must specify which records will be affected. When a record is selected, the background color changes to pale blue. In addition, the number of records selected is indicated in the action buttons which act on all selected rows. Buttons which act only on the current row do not display the number of records. For example, the Open button which only opens the current record regardless of your selections does not include this number.

> **Note:** If no records are selected using the following methods the current record is used as the selected record. Once another record is explicitly selected the current record is not considered

selected unless it too is selected using one of the following methods.

▶ **To select multiple records:**

1. While holding down the **Ctrl** key, click on each desired record.

▶ **To select a range of records:**

1. Click on the first record of the desired range.

2. Hold the **Shift** key down and click on the last record of the desired range with your mouse to highlight the selected range.

▶ **To select all records:**

1. Choose **Select All** from the Edit menu.

▶ **To deselect all records:**

1. Choose **Deselect All** from the Edit menu.

▶ **To deselect a single record:**

1. While holding down the **Ctrl** key, click on each record you wish to omit.

Customizing the Presentation of Data

This chapter discusses how you can customize the layout of your data in a folder block.

Customizing the Presentation of Data in a Folder

A *folder block* is a special block whose field and record layout you can customize. The following helps you distinguish a folder block from a regular block:

- An **Open Folder** button appears in the upper left corner of a folder block.

- An enabled **Folder Tools** button appears on the toolbar when your cursor is in a folder block.

- An enabled **Folder** menu appears in the main menu bar when your cursor is in a folder block.

You can customize a folder block to retrieve just a subset of records and display those records in a different layout. You can save your customizations as a *folder* which defines the layout of your fields and the query criteria used to retrieve your subset of records.

When you first install Oracle Applications and navigate to a folder block, what you see is the original default folder definition or a folder defined by your system administrator. You can modify this default folder definition and save your customizations to be the new default. You can distinguish a custom default folder definition from the original default folder definition because a custom default folder definition always displays its name next to the Open Folder button.

☞ **Attention:** If your system administrator sets the profile option Folders: Allow Customization to No, you cannot create or customize folders. The only item available from the Folder menu is **Open**, to open a predefined folder.

Note: With the addition of multi–language support, folders are associated with specific languages. Existing folders are associated with the base language of the Site and new folders are associated with the language used when the folder is created. Folders can only be accessed when the Applications are running in the same language that is associated with the folder. For example, a folder created in the French version of Applications cannot be accessed when running the Applications in German.

This section teaches you how to use folders to present the data you want and in particular, shows you how to:

- use the folder tools

- query records in a folder block

- customize the layout of a folder block
- manage folder definitions

See Also

Folder Menu: page A – 5

Basic Business Needs

A folder block lets you satisfy the following basic customization needs:

- Display only those fields that are of interest to you.
- Instantly modify the width, sequence, and prompts of the fields you want to display.
- Display a subset of records based on your specific criteria.
- Display records in a specific order.
- Save your folder customizations for later use.
- Automatically query for a subset of records each time you open a specific folder.
- Keep your folder customizations private or make them public for others to access.
- Make your customizations the default layout for a folder block.

Using Folder Tools

When you navigate to a folder block, the **Folder Tools** button gets enabled on the toolbar. Choose this button to display the folder tools palette on your screen. The folder tools include the following buttons that replicate the actions of some commonly used Folder menu items:

- **Open Folder**—open another folder.

- **Save Folder**—save the current folder.

- **Create New Folder**—create a new folder.

- **Delete Folder**—delete an existing folder.

- **Widen Field**—increase the width of a field.

- **Shrink Field**—decrease the width of a field.

- **Show Field**—show a currently undisplayed field.

- **Hide Field**—hide a currently displayed field.

- **Move Left**—swap the current field with the field to its left in a multi–record block. In a single–record block, move the current field one character width to the left.

- **Move Right**—swap the current field with the field to its right in a multi–record block. In a single–record block, move the current field one character width to the right.

- **Move Up**—move the current field up by one character height for a single–record display.

- **Move Down**—move the current field down by one character height for a single–record display.

See Also

Folder Menu: page A – 5

Querying Records in a Folder

One advantage of a folder block is that you can customize it to display only the records you want to see. You can easily alter the query criteria for a folder and save that criteria with a folder. You can also control the sorting order of the records you display in a multi–record folder.

▶ **To define query criteria for a folder:**

1. Run the query you want, either by using Query Find or query–by–example.

2. Choose **Save As** from the Folder menu if you want to save this query criteria in a folder.

3. Enter a name for the folder.

4. Select **Always, Never**, or **Ask Each Time** from the Autoquery Option Group. If you select:

Always	The query will be automatically performed each time you open the folder.
Never	The query will be saved with the folder, but will not automatically run when you open the folder.
Ask Each Time	You will be prompted when you open the folder to decide if you would like the query to be performed immediately.

5. Choose **OK** when you are done.

☞ **Attention:** When you save a folder, the query criteria gets "locked in" to the folder. When you perform another query on that same folder, your new query will only be performed on the subset of records retrieved by the folder. If you want to perform a new query–by–example on the complete set of records, you need to first reset the query for the folder definition before performing another query.

▶ **To view the query criteria for a folder:**

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

A window titled Folder Contents appears. The window may contain a SQL WHERE clause that defines the criteria used to retrieve the subset of records displayed in the current folder. An empty window indicates that there is no special query criteria and that the current folder retrieves all records for the folder entity.

▶ **To reset the query criteria for a folder:**

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

This clears the WHERE clause from the current folder, but retains the current folder name and its field layout.

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

▶ **To alter the sorting order of data in a multi–record folder:**

1. Choose **Sort Data...** from the Folder menu.

This menu item displays the Sort Data window that enables you to set the sort option for the first three fields in the block.

2. Choose a sort option for the fields you wish to sort:

- **Ascending**—sorts the column in ascending order

- **Descending**—sorts the column in descending order

- **Unsorted**—does not sort the column

These settings determine how the folder sorts the records it displays. The folder applies these settings from left to right when it retrieves and sorts the records.

3. Choose **OK**.

▶ **Example**

■ Suppose you want to create a folder definition called Unposted Batches in the Enter Journals folder block of your Oracle General Ledger application. You want this folder definition to automatically display unposted batch records. First choose **Show Field...** from the Folder menu to show the Batch Status field, if it is not already displayed. Next, choose **Enter** from the View > Query by Example menu to perform a query–by–example. Enter the value **Unposted** in the Batch Status field, then choose **Run** from the View > Query by Example menu to retrieve all unposted batch records.

The following illustration shows the Enter Journals window with only the unposted batches displayed.

Choose **Save** or **Save As...** from the Folder menu to save this query criteria and layout. Enter a unique name to identify the folder. Make sure to set the **Auto Query** option group to the desired behavior. You can also choose **View Query...** from the Folder menu at any time to display the WHERE clause for this query in the Folder Contents window.

See Also

Folder Menu: page A – 5

Customizing the Layout of a Folder

The Folder menu and folder tools provide you with many options to help you customize your folder layout. Some of these tasks may also be performed using your mouse directly on the fields you wish to

change. You can change the width, sequence, prompts and the order of the data of a field using your mouse. For example, to change a prompt, position your cursor over the prompt and click your right mouse button. This displays a dialog box for making your change. To toggle the sorting of a row from ascending to decesending or vice versa use your left mouse button and click once on the prompt.

> **Note:** Some Folder menu items are not available when you are in Enter Query mode.

▶ **To show a hidden field:**

1. Choose **Show Field...** from the Folder menu to display a list of currently undisplayed fields.

2. Select a value from the list and choose **OK** to display the field in the folder layout.

   The new field is inserted after the current field, and the cursor moves to the new field.

▶ **To hide a field:**

■ Choose **Hide Field** from the Folder menu to remove the current field from the folder layout.

   Your cursor moves to the field sequenced after the field that was removed.

▶ **To move a field to the right:**

■ Choose **Move Right** from the Folder menu.

   In a multi–record block, this swaps the position of the current field with the field to its right. In a single–record block, this moves the current field one character–width to the right.

▶ **To move a field to the left:**

■ Choose **Move Left** from the Folder menu.

   In a multi–record block, this swaps the position of the current field with the field to its left. In a single–record block, this moves the current field one character–width to the left.

▶ **To move a field up in a single–record block:**

■ Choose **Move Up** from the Folder menu.

This moves the current field one character–height up.

▶ **To move a field down in a single–record block:**

- Choose **Move Down** from the Folder menu.

  This moves the current field one character–height down.

▶ **To widen a field:**

- Choose **Widen Field** from the Folder menu.

  This increases the width of the current field by a 0.2 inch increment, up to a maximum width of 20 inches.

▶ **To shrink the width of a field:**

- Choose **Shrink Field** from the Folder menu.

  This decreases the width of the current field down to a minimum width of 0.2 inches.

▶ **To autosize all the fields of a folder:**

- Choose **Autosize All** from the Folder menu.

  Resizes displayed fields based on a sample of values for the field in the block, ensuring that no field is smaller than the width of it's prompt. The number of records (sample of values) is determined by selecting one of three options: 10, 50, or 100 in the decision window.

▶ **To rename a field prompt:**

1. Choose **Change Prompt** from the Folder menu.

2. Enter a new prompt name in the Alter Prompt window that appears.

   If you precede a prompt name with a hyphen, '–', and you choose to show the field in the folder, the field appears without a prompt.

3. Choose **Default** if you wish to recover the original prompt name for the field.

4. Choose **OK** when you are done.

☞ **Attention:** Shorten or abbreviate a prompt name rather than change it altogether. This ensures consistency with the similar

prompt names that appear in the non–folder windows of your application.

See Also

Folder Menu: page A – 5

Using the Folder Tool Palette: page 4 – 3

Managing Folder Definitions

Once you learn to customize a folder block's layout and query criteria, you need to learn to save your customizations as a folder. You can create and save new folders, or open and delete existing folders. When you open a new folder, the layout for the new folder simply replaces the layout for the current folder.

▶ **To create a new folder:**

1. Choose **New** from the Folder menu.

   The Create New Folder window appears.

2. Enter a new folder name.

   The name must be unique for the Oracle Applications sign–on you use and for the entity that the folder represents. For example, if your folder queries employees working in the sales department of Chicago, you could title your folder similar to 'Salereps – Chicago'

3. Check an **Autoquery** option:

   • **Always** – automatically queries for a subset of records each time you open the folder definition

   • **Never** – does not query

   • **Ask each time** – opens the decision box when the folder is opened. Choose **Yes** to query.

4. Check **Open as Default** if you want this specific folder definition to open as your default each time you navigate to this folder for the first time after invoking the form.

5. Check **Public** if you want other Oracle Applications users to have access to this folder definition. They can even use it as their default folder, but only you can modify it.

6. Choose **OK** when you are done.

   The name that you assign to this folder appears in the upper left corner of the folder block next to the Open Folder button, whenever you open this folder. The original default folder definition provided with the product does not have a folder title unless you save it with a new name.

▶ **To recover the original default folder definition for a folder block:**

Once you create a custom folder definition and make it the default, you can recover the original default folder definition shipped with the product by performing these steps.

1. Select **Save As** from the Folder menu when you are in the custom default folder.

2. Uncheck **Open as Default** in the Save As window that appears.

3. Choose **OK** when you are done.

4. To display the original default folder definition, close and reopen the form.

☞ **Attention:** If you like this original default folder, you should give it a name and save it without making any changes before you create any new folders. This way, you can open the original folder by choosing it from a list of predefined folders.

▶ **To open another folder:**

1. Choose **Open** from the Folder menu to load a predefined folder. You can also press the Open Folder button located in the upper left corner of the folder block.

2. Select a private or public folder from the list window that appears and choose **OK** to replace the current folder with the new folder.

▶ **To save changes to a folder:**

1. Choose **Save** from the Folder menu to save any layout or query changes made to the current folder or choose **Save As** from the Folder menu to save the current folder under a new name.

2. If you choose **Save As**, complete the information requested in the Save Folder window that appears and choose **OK**.

   This window prompts you for the same information as the Create New Folder window.

☞ **Attention:** If you save a folder to "Open as Default", then open another folder and save that second folder also as "Open as Default", the second folder becomes the new default.

☞ **Attention:** If you modify a public folder in any way, saving it makes it a private folder. However, if you open and save a public folder to "Open as Default" with no other changes, you merely save a reference of that folder as a private default.

▶ **To delete an existing folder:**

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

2. Select a folder from the list that appears and choose **OK** to delete the folder. You can only delete folders you have created.

   If another user is referencing that folder definition as their "Open as Default" folder, that reference gets deleted as well.

See Also

Folder Menu: page A – 5

Using the Folder Tool Palette: page 4 – 3

Using Flexfields

This chapter provides you with a conceptual overview of flexfields and how to use them. You learn about:

- The features of flexfields

- The differences between a key and a descriptive flexfield

- How to enter data into flexfields

- How to query data using flexfields

Overview of 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.

Basic Business Needs

Oracle Applications flexfields let you satisfy the following business needs:

- Have "intelligent fields"—fields comprised of one or more segments, where each segment has both a value and a meaning.

- Rely upon your application to validate the values or the combination of values that you enter in intelligent fields.

- Have the structure of an intelligent field change depending on data in your application.

- Capture additional information if you so choose.

- Customize data fields to your meet your business needs without programming.

- Query intelligent fields for very specific information.

Definitions

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. For example, your organization

may use the part number code "PAD–NR–YEL–8 1/2x14" to represent a notepad that is narrow–ruled, yellow, and 8 1/2" by 14". But another organization may identify the same notepad with the part number code "PD–8x14–Y–NR". Although both codes represent the same part, they each have a different segment structure that is meaningful only to the organization using that code.

A key flexfield is flexible enough to let you use any code scheme you want to describe an entity. When your organization initially installs an Oracle Applications product, your organization's implementation team customizes all the key flexfields in that product to use meaningful code segments to describe each key flexfield entity. Your organization decides for each key flexfield, how many segments an entity has, what each segment means, what values each segment can have, and what each segment value means. Your organization can also define rules that govern what combination of segment values are valid (cross–validation rules), or define dependencies among the segments. The result is that your organization can use the codes it needs rather than change its codes to meet someone else's requirements.

The Accounting Flexfield in your Oracle Purchasing application is an example of a key flexfield that identifies a unique chart of accounts. One organization may choose to customize the Accounting Flexfield to have three segments called Company, Department, and Account, while another organization may choose to customize the flexfield to have five segments called Company, Cost Center, Account, Sub–Account, and Product, as shown in Figure 5 – 1 in the Charge Account column.
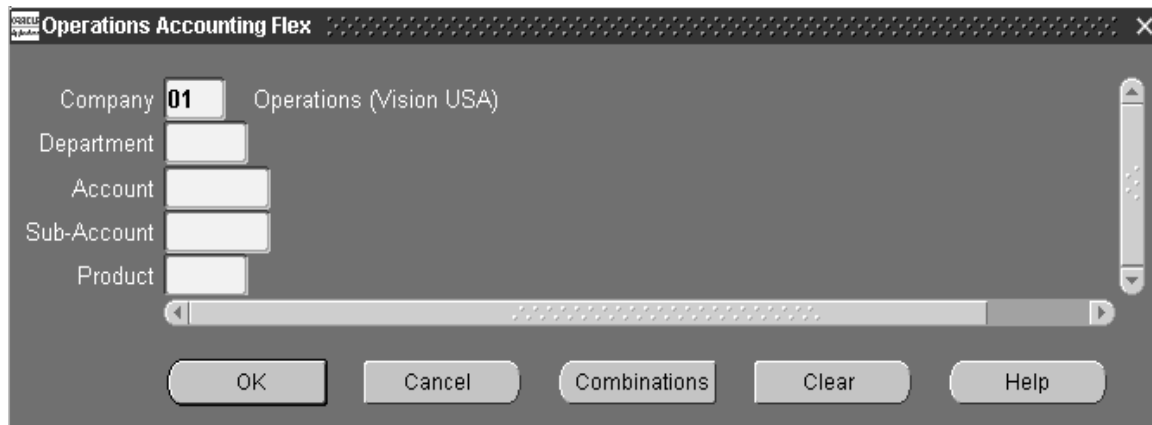
Figure 5 – 1

A key flexfield looks like any other field in a block. You can simply type into a key flexfield, the segment values you want and separate

each segment with a character called a segment separator. In
Figure 5 – 1, the designated segment separator for the Accounting
Flexfield is a period ".". Alternatively, you can open a flexfield
window for a key flexfield to display a separate field for each of its
segments. Figure 5 – 2, shows the Operations Accounting Flex
window. The flexfield segments, Company, Department, Account,
Sub–Account, and Product each has a field for data entry.

Figure 5 – 2

Combination of Segment Values

A *combination of segment values*, also known as a key flexfield *code
combination*, uniquely describes a business entity stored in a key
flexfield. When you change the value of one or more segments in a key
flexfield, you change the combination of segment values.

Descriptive Flexfields

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. Figure 5 – 3 shows the Enter Person window
of the Human Resources Application. The flexfield appears at the
bottom right of the window.

Figure 5 – 3

A descriptive flexfield window appears when you move your cursor into a customized descriptive flexfield. Figure 5 – 4 shows the Additional Personal Details descriptive flexfield window. Your organization's implementation team can customize a descriptive flexfield to include as many additional fields as your organization needs. These fields, also called segments, appear in the descriptive flexfield window.

> **Note:** We refer to the fields that appear in a customized descriptive flexfield as segments even though they differ from the segments that make up a single value in a key 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.

As shown in the Additional Personal Details flexfield window in Figure 5 – 4, your organization might customize the descriptive flexfield to display fields that store more information about the employee, such as Drivers License Number and Global ID.

Figure 5 – 4

Range Flexfield

A *range flexfield* is a variation of a key flexfield that allows you to input a low and a high combination of segment values so that you can express a range of key flexfield combinations.

Structure

A *structure* is a specific configuration of flexfield segments. If your organization's implementation team adds or removes segments, or rearranges the order of segments in a flexfield, you get a different structure.

Major Features

Flexfield Window

Both key and descriptive flexfields display flexfield windows. A flexfield window displays the segments of a flexfield as individual fields with field prompts.

Choose the **List of Values...** icon or **Edit Field...** from the Edit menu to display key flexfield windows.

> **Note:** Single segment key flexfields and range flexfields display all of their segments in fields on the form and are therefore not displayed in a flexfield window.

For a descriptive flexfield, you can define whether you want the flexfield window to automatically appear when you navigate to a customized descriptive flexfield. If you set a user profile option called *Flexfields: Open Descr Window* to *No*, the window does not open unless you choose **Edit Field...** from the Edit menu. If you set the user profile option to *Yes*, a flexfield window automatically opens when you navigate into a customized descriptive flexfield except in a folder.

Automatic Segment Validation

Some flexfields can validate the segment values that you enter against a list of valid values. If you enter an invalid segment value, a list window appears so that you can choose a valid value from the list.

Automatic Segment Cross–Validation

A key flexfield can perform automatic cross–validation of segment values according to rules your organization defines when it customizes that key flexfield. A cross–validation rule defines whether a value of a particular segment can be combined with specific values of other segments. When you finish entering segment values in your key flexfield window, your application checks to see if it is a valid combination of values before it updates the database. If you enter an

invalid combination, a modal window appears with a message telling you to choose a combination that is already defined.

Dynamic Insertion

Dynamic insertion allows you to create a combination of segment values for a key flexfield without using a combinations form. During the implementation of a key flexfield, your organization can either explicitly define a list of valid code combinations for the key flexfield using a combinations form, or allow you to create valid combinations as you enter values in the key flexfield for the first time on a form other than the combinations form. Your organization can also specify cross–validation rules for a key flexfield so that you can only define specific code combinations during dynamic insertion.

Multiple Flexfield Structures

In some applications, different users may need a different arrangement of flexfield (key or descriptive) segments. Or, you might want different segments to appear in a flexfield depending upon, for example, the value of another field.

Depending on the flexfield, your organization can define multiple segment structures for the same flexfield. The flexfield can display different prompts and fields for different users based on a data condition in a form or application database.

Your Oracle General Ledger application, for example, can provide different Accounting Flexfield structures for users of different sets of books. The Oracle General Ledger application determines which flexfield structure to use based on the value of a profile option called GL Set of Books Name.

Shorthand Flexfield Entry

Shorthand flexfield entry lets you enter key flexfield data quickly using alias names that represent valid flexfield combinations or patterns of valid segment values. Your organization can specify which key flexfields use shorthand flexfield entry, and define shorthand aliases for those key flexfields to represent complete or partial sets of key flexfield segment values. Once your organization customizes a key flexfield to use shorthand flexfield entry, you can set the user profile option Flexfields:Shorthand Entry to take advantage of this feature.

Flexfield Value Security

Flexfield value security allows your organization to restrict the set of key flexfield segment values you have access to during data entry. The security is based on a your responsibility and the access rules your organization defines.

See Also

Entering Data in a Range Flexfield: page 5 – 17

Setting Your Personal User Profile: page 9 – 5

Entering Data into Flexfields

Oracle Applications provides many aids to help you enter data into descriptive and key flexfields. This section describes how to enter data in a:

- descriptive flexfield window
- key flexfield
- key flexfield window
- key flexfield using a shorthand alias
- range flexfield

Entering Data in a Descriptive Flexfield Window

You enter data into a customized descriptive flexfield by using its flexfield window. Figure 5 – 4 displays a customized descriptive flexfield window. Your organization can customize a descriptive flexfield to display default values in any of the segments.

▶ **To enter data in a descriptive flexfield:**

1. Move your cursor into a customized descriptive flexfield to display the flexfield window. If your profile option *Flexfield:Open Descr Window* is set to *No* or if you are in a folder, choose **Edit Field...** from the Edit menu to open the flexfield window.

   When the window appears, the cursor moves to the first segment that does not contain a default value.

2. 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. See: Using a List of Values: page 3 – 9.

3. If you wish to edit a default value, simply move your cursor into the segment you wish to edit and type over the default value.

4. You can save yourself keystrokes when you enter segment values by automatically skipping to the next segment as soon as you enter a complete valid value into a current segment. Simply set the profile option Flexfields:AutoSkip to *Yes*. Set the profile option to

No if you want to manually navigate to the next segment after entering a value. See: Setting Your Personal User Profile: page 9 – 5

5. Choose **OK** when you are done to close the flexfield window.

The segment value(s) you enter are concatenated in the two character descriptive flexfield display. The concatenated segment values in the descriptive flexfield are separated by a special character called a segment separator that is specified in the descriptive flexfield definition.

> **Note:** If you display a customized descriptive flexfield in a folder definition, you are able to move the cursor into the flexfield so you can use folder functions. You cannot, however, update or insert values directly into the descriptive flexfield; you must use the descriptive flexfield window.

See Also

Customizing the Presentation of Data in a Folder: page 4 – 2

Entering Data Directly in a Key Flexfield

▶ **To enter a known combination into a key flexfield:**

1. Move your cursor into the key flexfield.

2. If you know the exact combination of segment values you want, enter the concatenated combination directly into the key flexfield as shown in Figure 5 – 1.

▶ **To display a list of existing combinations:**

1. Move your cursor into the key flexfield.

2. Choose the **List of Values** icon to open the Flexfield window.

3. 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.

▶ **To display a reduced list of existing combinations:**

1. Move your cursor into the key flexfield.

2. Enter segment values directly into the key flexfield. To specify search criteria for a segment or part of a segment, use wildcards or query operators.

   You can use wildcard characters or query operators to enter inexact concatenated combinations, also known as search phrases, directly into a key flexfield. See: Using Query Operators: page 3 – 23.

☞ **Attention:** When you enter a search phrase for a segment directly into a key flexfield, the search phrase length should not exceed the actual segment length. For example, if a segment is two characters long, you should only enter a two character search phrase. You can only use the query operators <, >, and =. You cannot use <=, >=, <>, !=, or #BETWEEN in this case because these operators are already two or more characters long, and are meaningless as search phrases when used alone.

   Note, however, that if you enter a search phrase in a key flexfield window, you do not have to limit the length of the search phrase to the segment length.

   Also note that if the segments are character fields rather than numeric, the search may not bring up the expected values. See: Using Query Operators: page 3 – 23.

☞ **Attention:** Make sure you use the correct designated character for the segment separator in your concatenated combination. If your key flexfield uses "." instead of "–" to separate segments, you would enter a concatenated combination such as 01.130.410.12%.000.000 instead of 01–130–410–12%–000–000. If you enter the wrong character for the segment separator, the flexfield interprets that character literally rather than as a segment separator, and therefore assumes the combination you enter is just the first segment.

   Similarly, if you enter a partial phrase directly into a key flexfield, and that phrase pertains only to the third segment, make sure you include the appropriate wildcards and segment separator in the phrase. For example if you want to specify a partial phrase where the third segment is 410 and all other segments are unknown, you enter %.%.410, assuming the key flexfield uses a period (.) as a segment separator. Notice that even if the flexfield has more than three segments, the remaining segments are assumed to have % when the combinations list appears.

3. Press [Tab] to bring up a reduced list of values matching your specified search criteria.

Note: If you enter an invalid value for one or more segments, the Reduction Criteria for Long List window is displayed with your search criteria filled in. The first invalid value is highlighted allowing you to enter a different value or use LOV for a list of valid values. Once a valid value is entered the next invalid value is highlighted, and so on until all values are valid.

If you enter a valid search phrase but which matches no values, the Reduction Criteria for Long List window is displayed with your search criteria filled in. You can then edit the search criteria directly in the flexfield Reduction Criteria window. See: Data Entry in a Key Flexfield Window: page 5 – 13.

If you enter a partial valid combination without wildcard characters directly in a multi–segment key flexfield, the Flexfield Edit window appears with your partial combination filled in. You can then use this window to fill in the rest of the segments. See: Data Entry in a Key Flexfield Window: page 5 – 13.

In a single segment key flexfield, you cannot enter partial values without wildcard or query operators. If you enter an incomplete value, a message will appear telling you to enter a value that is defined.

Single Segment Key Flexfields and Longlist

Single segment key flexfields behavior changes from the multi–segment case if the flexfield definition for the single segment key flexfield has the Longlist argument. The Longlist argument for a flexfield definition can indicate that the flexfield does not have a very large number of valid values. If so, and the flexfield does not allow dynamic insert then when you choose List of Values a window with a list of valid values appears like in non–flexfield fields (you do not have to go through the key flexfield Reduction Criteria window). You can then choose a valid value from the list and the value appears in the flexfield. See: Longlist: page 3 – 12.

Data Entry in a Key Flexfield Window

If you are not familiar with a key flexfield or you are not sure of the combination of values to enter directly into a key flexfield, you can display a key flexfield window to assist you with your data entry.

- **Edit window**—choose **Edit Field...** or for multi–segment flexfields choose the **List of Values** icon from the Edit menu to display a key flexfield Edit window that lets you enter or edit a combination of segment values.

Using a Key Flexfield Edit Window

When you choose **Edit Field...** from the Edit menu, a key flexfield Edit window appears. The example below shows the Operations Accounting Flex window. This particular flexfield edit window contains the segment fields Company, Department, Account, Sub–Account, and Product.

Figure 5 – 5

When you display a key flexfield Edit window, the name of the key flexfield structure appears in the window title and you may see default values in some of the segment fields.

In a key flexfield Edit window, you can manually type values into each segment field, or display a list of values for the current segment if a <List of Values> lamp appears in the status line for that segment.

You can also save yourself keystrokes when you enter segment values by having the flexfield automatically skip to the next segment as soon as you enter a complete valid value in a current segment. Simply set the profile option Flexfields:AutoSkip to *Yes*. Set the profile option to *No* if you want to manually navigate to the next segment after entering a value. See: Setting Your Personal User Profile: page 9 – 5.

If the combination of segment values that you want to enter is an existing combination, but you are not sure of its exact value, you can

choose **Combinations** to search for that combination among the list of existing combinations. See: Using a Key Flexfield Reduction Criteria Window: page 5 – 15.

When you are done with the key flexfield Edit window and choose OK, the Edit window closes and displays the concatenated combination of segment values in the key flexfield.

☞ **Attention:** If you navigate to a key flexfield that cannot be updated the Combinations button is disabled. This is to reinforce that you cannot change the value in the key flexfield.

Using a Key Flexfield Reduction Criteria Window

When you choose **Combinations**, the following occurs depending on the underlying segment structure of the key flexfield:

- If the key flexfield is a multi–segment flexfield, or a single–segment flexfield that uses the longlist feature, a key flexfield Reduction Criteria window appears.

- If the key flexfield has only one valid value, that value automatically appears in the key flexfield.

A key flexfield Reduction Criteria window lets you query for an existing combination of segment values to help you complete your data entry in a key flexfield. This window is useful when you know that the combination you want to enter is a valid existing combination, but you are not sure of its exact value. Use this window to enter criteria that helps locate the combination of segment values that is of interest to you.

If you know the value for a particular segment, you can enter that value manually or you can select that value from the segment's list of values. If you are not sure of a segment's value, you can either leave it blank or you can enter a search phrase using wild card characters or query operators. See: Using Query Operators: page 3 – 23.

For example, suppose the combination of segment values you want must satisfy the following criteria:

- Segment 1—is greater than 2

- Segment 2—is less than 0020

- Segment 3 and 4—unknown

You could specify this criteria in the key flexfield Reduction Criteria window as:

- >'2' – for Segment 1

- <'0020' – for Segment 2

- Leaving Segments 3 and 4 blank.

When you choose **OK**, the flexfield searches through all the existing combinations of segment values for combinations that match and displays the matches in a list.

After you select a valid combination from the list and choose **OK**, the list window closes and the segment values appear in the window from which you invoked your key flexfield Edit window.

Using Shorthand Aliases in a Key Flexfield

If your organization enables shorthand data entry for a key flexfield and you set the user profile option Flexfield:Shorthand Entry to *Yes*, a shorthand alias window appears for a key flexfield when you choose **Edit Field...** from the Edit menu. You can do one of the following in that window:

- Enter an alias

- Display a list of valid aliases

- Cancel the shorthand alias window

Entering an Alias

If you enter an alias to represent a complete key flexfield combination, your application automatically closes the shorthand alias window and displays the equivalent concatenated segment values in the flexfield display. See: Shorthand Flexfield Entry: page 5 – 8.

If you want to force the key flexfield window to appear after the shorthand alias window closes, you can set your user profile option Flexfield:Show Full Value to *Yes*. When you activate this user profile option, the key flexfield Edit window automatically appears after you enter a valid shorthand alias. The default for this option is *No*. See: Setting Your Personal User Profile: page 9 – 5.

If you enter an alias that represents a partial key flexfield value, your application displays the key flexfield Edit window and inserts the partial values into the appropriate segment fields, positioning the cursor on the first segment field that does not have a value.

If you enter an invalid alias, your application displays a list of valid aliases for you to select from.

Choosing a Valid Alias from a List

If you do not know what alias to enter in a shorthand alias window, you can display a list of valid aliases by choosing the List of Values button.

Canceling the Shorthand Alias Window

You may bypass shorthand flexfield data entry by choosing OK or Cancel in the shorthand alias window without entering a value. The key flexfield Edit window appears instead, containing separate prompts and fields for each of the key flexfield segments.

Entering Data in a Range Flexfield

A *range flexfield* allows you to input a low and a high combination of segment values to express a range of key flexfield combinations. Your Oracle General Ledger application illustrates how you can use a range flexfield. The Accounting Flexfield Ranges block of the Define Budget Organization form contains a range flexfield called Accounting Flexfield, as shown in Figure 5 – 6. This range flexfield is actually based on the Accounting Flexfield key flexfield.

Figure 5 – 6
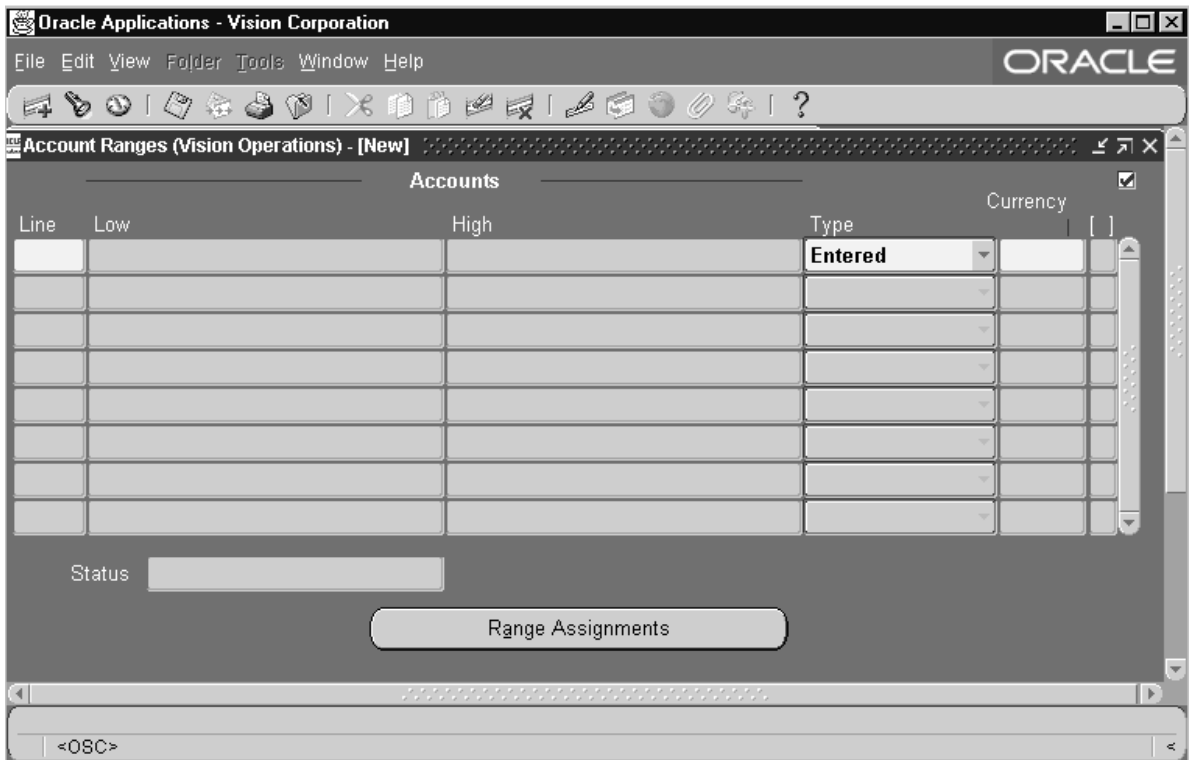
This range flexfield requires you to enter a low and a high combination of segment values to specify the Accounting Flexfield range you want to include in a budget organization. To enter a value in a range flexfield, just move your cursor into the first key flexfield of the range flexfield. In this example, it is the field labeled Low. A range flexfield window displays, as shown in Figure 5 – 7.

Figure 5 – 7

Operations Accounting Flex

	Low	High
Company	02	04
Department	400	700
Account	7400	7420
Sub-Account	0000	0000
Product	000	000

OK   Cancel   Clear   Help

Notice that this window displays a Low column and a High column of fields for each segment so that you can enter a low and a high value to express a range. If the segment contains a list, as indicated by the presence of the <List of Values...> lamp on the status line, you can choose the List of Values icon in the field to display a list of valid values.

Once you finish entering your values, choose OK to close the Range window. The range flexfield automatically inserts the concatenated low and high combination of segment values that you entered in the appropriate fields of the range flexfield display. The Account Ranges window with the Low and High flexfield entries is shown below.

Figure 5 – 8
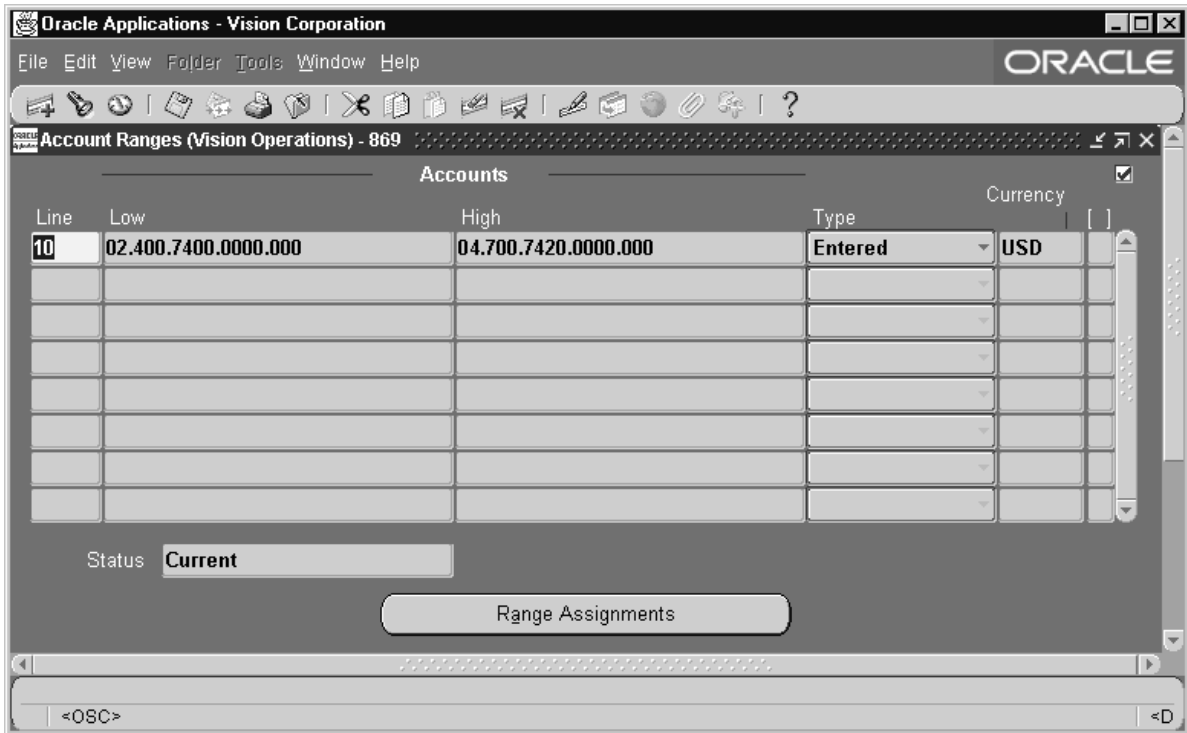
🖙 **Attention:** You cannot enter values directly into a range flexfield like you can in a key flexfield.

Searching for Data Using Flexfield Criteria

In chapter 3, you learned how to search for records in a window using a feature called query–by–example. In this section you learn how you can also enter search criteria in a flexfield when you use query–by–example. By entering search criteria in a flexfield, you can retrieve records of data that satisfy criteria in the individual segments of your key or descriptive flexfields. For example, suppose you want to search for all Accounting Flexfield combinations in the Accounting Flexfields Combinations window that contain the segment value "01" in the first segment. With query–by–example, you can enter this criteria in the Accounting Flexfield to accomplish this task.

When you enter search criteria for a flexfield segment, you can use wildcard characters or any of the query operators as part of the search phrase. See: To Use Query–by–Example: page 3 – 23.

If your flexfield segment has a list available, you can choose the List icon within the flexfield window to select a value from the list for your search criteria. Note that if you enter a value for a segment, your application automatically enters the default value for any other segments that depend on the value you enter. If you do not want a default value as part of your search criteria, you can clear the field, or you can enter another value in that field.

Entering Search Criteria in a Key Flexfield

Recall that to initiate query–by–example, you choose **Enter** from the View, Query by Example menu to switch to Enter Query mode in the current block. In addition to entering search criteria in any of the fields of the block, you can choose **Edit Field...** (for multi–segment flexfields) from the Edit menu or the **List of Values** icon to bring up a key flexfield window. Use the key flexfield window to specify search criteria for any of the segments of the flexfield. When you are done, choose OK to close the flexfield window and then choose **Run** from the View, Query by Example menu to perform the search.

> **Note:** If you prefer, you can also enter your concatenated segment search criteria directly into a key flexfield display when your block is in Enter Query mode. The concatenated search criteria must include the appropriate segment separator character. When you are done specifying the search criteria for the block, choose **Run** from the View, Query by Example menu to perform the search.

Entering Search Criteria in a Descriptive Flexfield

To enter search criteria in a customized descriptive flexfield when your current block is in Enter Query mode, simply navigate to the descriptive flexfield to automatically display the descriptive flexfield window. When you are done entering search criteria in any or all of the descriptive flexfield segments, choose OK to close the descriptive flexfield window and then choose **Run** from the View, Query by Example menu to perform the search.

☞ **Attention:** If you set the user profile option Flexfields:Open Descr Window to 'No', you must choose **Edit Field...** from the Edit menu to open the descriptive flexfield window. See: Setting Your Personal User Profile: page 9 – 5.

6

Running Oracle Applications Reports and Programs

This chapter gives you an interview of how to run reports and programs in Oracle Applications. Specifically, you learn about:

- The concurrent processing feature that allows you to run reports and programs noninteractively

- How to run reports and programs using Standard Request Submission

- How to define request sets

Overview of Reports and 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.

For example, as an Oracle Receivables user, you may be able to run a report to create invoices. Or in your Oracle General Ledger application, your responsibility may allow you to run a program to post journal entries.

Oracle Applications provides you with two features called *concurrent processing* and *Standard Request Submission* to help you run the reports and programs that are a part of your responsibility.

Overview of Concurrent Processing

Concurrent processing is a feature that allows you to run a 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.

An example of concurrent processing occurs when you use the Post Journals window in your Oracle General Ledger application. Once you specify the journal batches to post and choose the Post button, your Oracle General Ledger application uses concurrent processing to post the journal batch entries without further involvement from you. Meanwhile, your computer is still available for you to continue doing other work in Oracle Applications.

Oracle Applications runs all of its reports and programs as concurrent processes.

Overview of Standard Request Submission

Standard Request Submission is a feature that works with concurrent processing to provide a common interface for running your Oracle Applications reports and programs.

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.

☞ **Attention:** Some Oracle Applications products provide, in addition to the Standard Request Submission windows, product–specific windows to submit certain reports and programs. Such a window automatically runs a report or a program as a concurrent process when you choose a specific button or save your work in the form.

The Post Journals window in the Oracle General Ledger application is an example of a window that submits a concurrent program to post journal entries when you choose the Post button. You should refer to the user's guide for your Oracle Applications product to learn if your product uses any product–specific windows to submit reports or programs.

See Also

Basic Business Needs

Concurrent processing helps you satisfy the following business needs. You can:

- Keep working at your computer while running data–dependent reports and programs.

- Fully use the capacity of your hardware by executing many application tasks at once.

Standard Request Submission lets you satisfy a related set of business needs. You can:

- 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.

- 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.

Definitions

Concurrent Program

A concurrent program is a program that does not require continued interaction on your part to perform a specific task. In Oracle Applications, for example, a concurrent program may be a program written to create a report, or to post a batch of general ledger journal entries.

Concurrent Process

A concurrent process is an instance of a running concurrent program. Each time a concurrent manager receives a request and runs a concurrent program, it creates a new concurrent process. A concurrent process can run simultaneously with other concurrent processes (and other activities on your computer).

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 or when you choose an action button in a product–specific submission window.

Concurrent Manager

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

Report

A report is an organized presentation of specific Oracle Applications information. You can view a report online, or send it to a printer. The content of a report can range from summary information to a complete listing of values. Reports run as concurrent programs in Oracle Applications.

Request Set

A request set is a collection of reports and/or programs that you group together. You can submit the reports and/or programs in a request set all at once using a single transaction.

Stage

A stage is a component of a request set used to group requests within the set. All requests in a stage are run in parallel, while the stages themselves are run sequentially in the request set.

Parameter

In Standard Request Submission, a parameter is a report variable whose value you can change each time you run a report. For example, you might run an audit report that requires you to enter an audit date each time you run the report. The audit date is a parameter for the report.

Major Features

Background Processing

You use your Oracle Applications windows to submit all your concurrent requests. Once your request is submitted, the concurrent

managers immediately take over, and complete the task with no further involvement from you.

Concurrent Processing Options

You can control and change certain run options for each of your concurrent requests. Not only can you control and change the number of copies to print, what print style to use, and which printer to use, but you can also choose to hold a request from being run, choose a specific date or time to start a request, or choose to save the results of your concurrent request in a standard file format.

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.

Automatic Error Notification

Every time you sign on, Oracle Applications informs you if any concurrent requests completed unsuccessfully since your last session. If so, you receive a message in a separate window when you first log in. You can review any failed request's log file online to help diagnose the problem.

Scheduling

Using Standard Request Submission, you can define schedules to automatically resubmit your program, report, or request set. At submission time, you can specify:

- the 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.

Produce Reports in Multiple Languages

Using Standard Request Submission for sites with Multiple Language Support, you can choose the languages in which to have your reports printed. Additionally, reports can be developed that produce language outputs based on the preferred language of the recipient.

Concurrent Processing Options

All reports and programs in Oracle Applications run as concurrent processes whether you submit them using the Submit Requests window, or using a product–specific submission window. Throughout this guide we refer to submitted reports and programs as *concurrent requests*, or simply as *requests*.

Each concurrent request runs according to a set of concurrent processing options.

Default Values of Concurrent Processing Options

The default values of the concurrent processing options are determined by the values of the following user profile options:

- **Concurrent:Hold Requests**—Specifies whether to hold a request temporarily
- **Concurrent:Report Access Level**—Specifies who has access to report and log files
- **Concurrent:Report Copies**—Specifies the number of copies of a report to print
- **Concurrent:Request Priority**—Specifies the priority of a concurrent request
- **Concurrent:Request Start Time**—Specifies the start date and time for a concurrent request
- **Concurrent:Save Output**—Specifies whether to save report output to a file
- **Concurrent:Sequential Requests**—Specifies whether to run your requests sequentially
- **Printer**—Specifies the printer to print your report output

If you want to change the value of a default, you must change the value of the corresponding user profile option using the Personal Profile Values window in your application. Some profile options, such as Concurrent:Request Priority, can only be changed by your system administrator. See: Setting Your Personal User Profile: page 9 – 5.

If you submit your report or program using the Submit Requests window, you can also modify most of these concurrent processing options for the request at the time you submit your request. If you use a product–specific window that automatically submits a concurrent request when you save your work or choose a button, Oracle

Applications uses the values defined by your user profile options as the concurrent processing options for your request.

> **Note:** You can modify many of your request's concurrent processing options up until it starts running, even if you cannot modify the options at the time you submit the request. The Requests window lets you monitor and change the options for your requests. See: Using the Requests windows: page 7 – 2.

See Also

Who Can Use a Request Set: page 6 – 41

Submitting a Request Set: page 6 – 23

Using Standard Request Submission

This section describes step–by–step how to run and monitor Oracle Applications reports and programs using Standard Request Submission. If you want to learn more about a particular report or program, or learn how to submit a report or program using a product–specific submission window, you should refer to the user's guide for your Oracle Applications product.

To use Standard Request Submission, you must first sign on to Oracle Applications and select a responsibility that allows you to run requests in your application.

> **Note:** For simplicity, this section uses the term *request* to refer either to a program or report.

Submitting a Request

Standard Request Submission gives you control over how you run your requests and request sets. This section describes how you customize and submit a request using the Submit Request window.

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.

You can submit as many requests as you like from the Submit Request window. You can even submit a request more than once if you want to run the same request with different parameter values.

Refer to the user's guide of your Oracle Applications product to learn how to access the Submit Request window from your application.

> ☞ **Attention:** Some applications provide access to the Submit Request window from multiple menu choices. However, the list of requests that you can run and the name of the window

itself may vary depending on the navigation path you use to access the window.

The following flow diagram outlines the steps required to submit a request.

Submit Request Flow

```
┌──────────────────┐
│    Choose to     │
│  submit a single │
│  request or a set│
│   of requests    │
└──────────────────┘
         │
         ▼
┌──────────────────┐
│  Enter Request   │
│   Information     │
└──────────────────┘
         │
         │        May be Required        ┌──────────────────┐
         ├──────────────────────────────▶│  Enter Parameter │
         │                                │      values      │
         │                                └──────────────────┘
         │
         │           Optional             ┌──────────────────┐
         ├──────────────────────────────▶│    Define a      │
         │                                │   submission     │
         │                                │    schedule      │
         │                                └──────────────────┘
         │
         ▼              Optional          ┌──────────────────┐
┌──────────────────┐ ──────────────────▶ │ Define completion│
│  Choose Submit   │                      │     options      │
│    Request       │                      └──────────────────┘
└──────────────────┘
         │
         ▼
┌──────────────────┐
│     Record       │
│   Request ID     │
└──────────────────┘
```
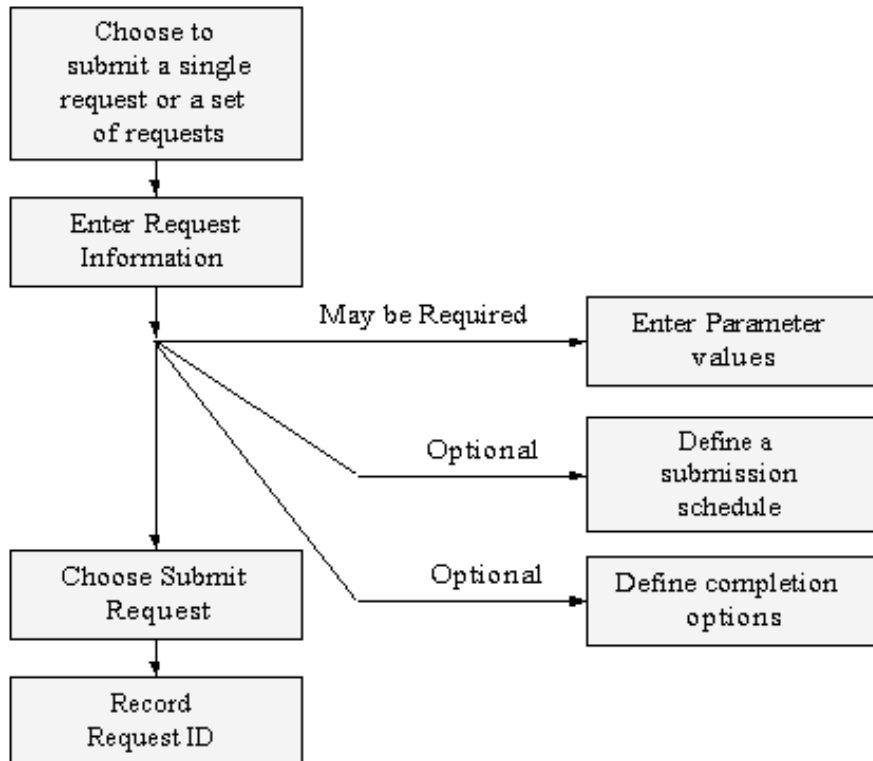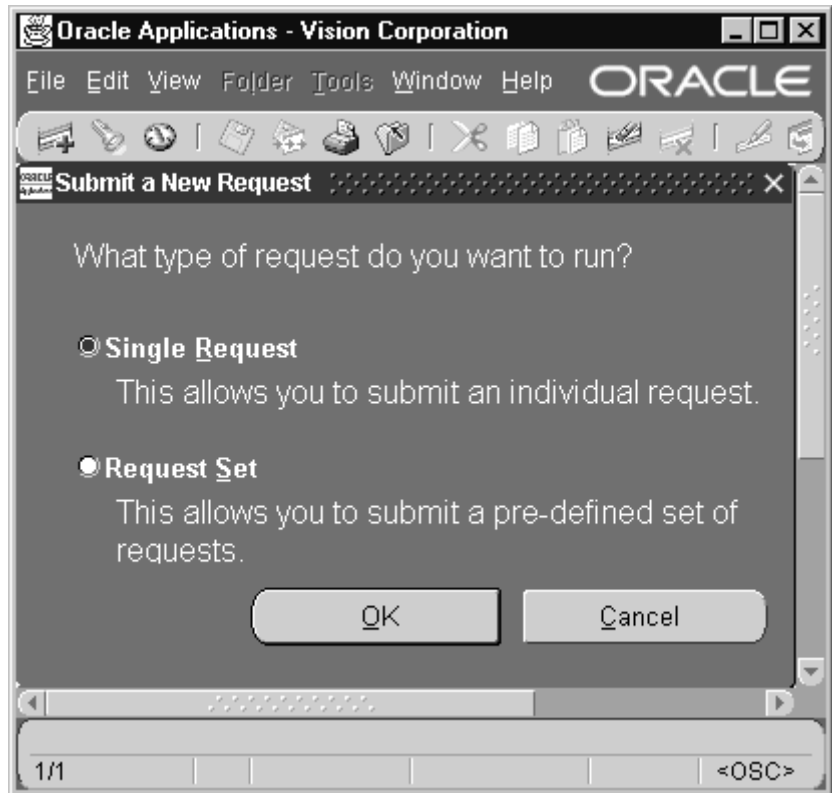
▶ **To submit a request:**

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**.
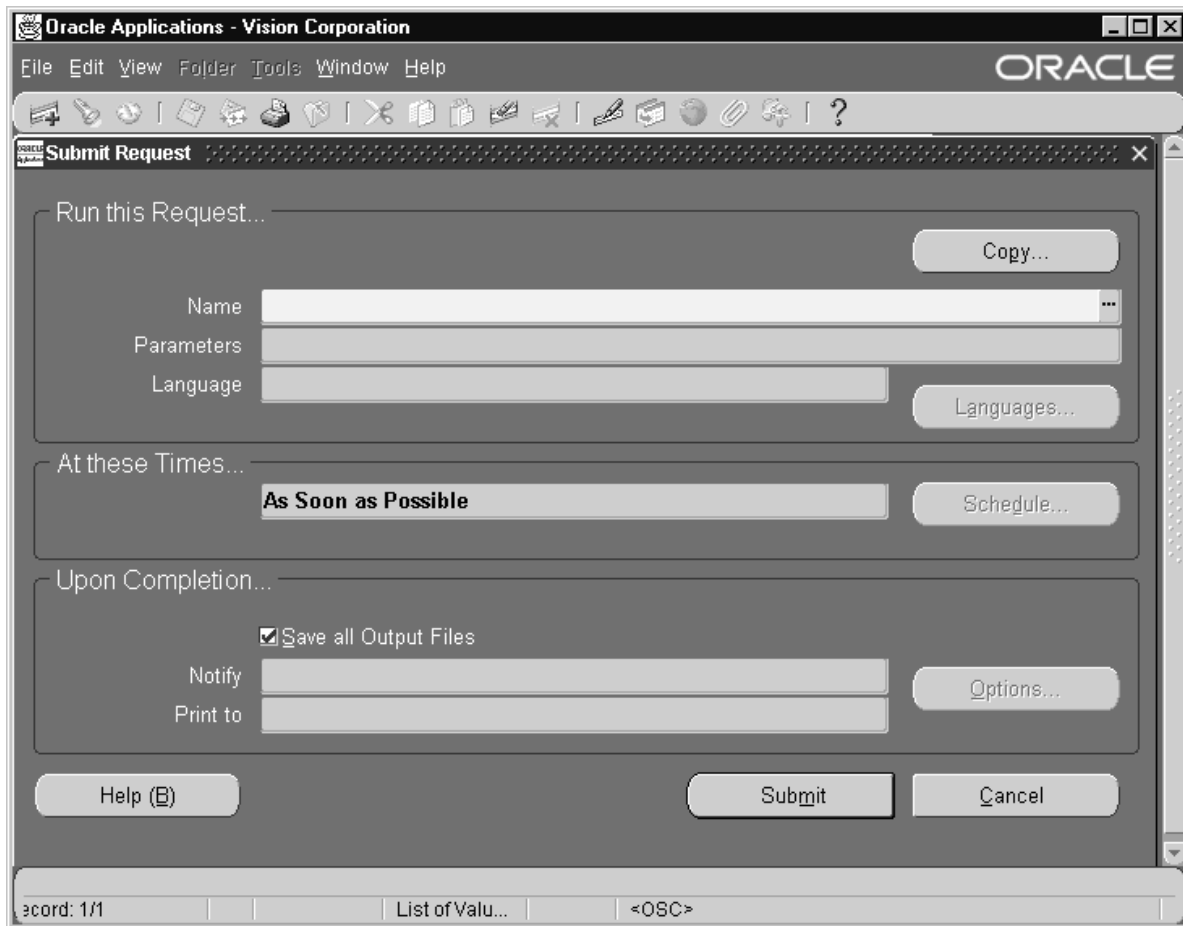
Submitting requests

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 option *Flexfields: Open Descr Window* is set to Yes. The prompts in the Parameters

window are specific to the request you select. The example in the figure below requires the parameters Application Name and Responsibility Name.

Some requests require you to enter parameter values so that you can specify the scope of information you want in the request output. Some requests don't have parameters at all. Some parameter fields also have a list of values available to ensure you choose a valid parameter value while other parameters are optional and require no value. Use the **List of Values** icon to display a list of valid values for a parameter.

> **Note:** Default values may be predefined for one or more of the parameters associated with your request. The default values are automatically applied to these parameters when the parameters window is opened. However; if you do not open the parameters window, default values are only applied to required parameters.

7.   Once you enter the values in the required parameter fields and choose **OK**, the Parameters window closes, and your parameter values are concatenated and displayed in the Parameters field.

Determining Output Language

8.   If your site supports multiple languages, you can select which language is used for your request output. Choose **Languages...** to open the Language window. Use the Select All button to produce output in all languages supported at your site or check individual languages. If the language selection is predefined in the report, the Language window does not open.

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

Defining a Submission Schedule

The scheduling window provides you with several scheduling options. You can choose to re–use a schedule you previously defined and saved, or define a new schedule. You can define your schedule to run a request as soon as possible, at a specific time, or repeatedly at specific intervals, on specific days of the week or month.

9.   Choose Schedule... to open the Scheduling window.
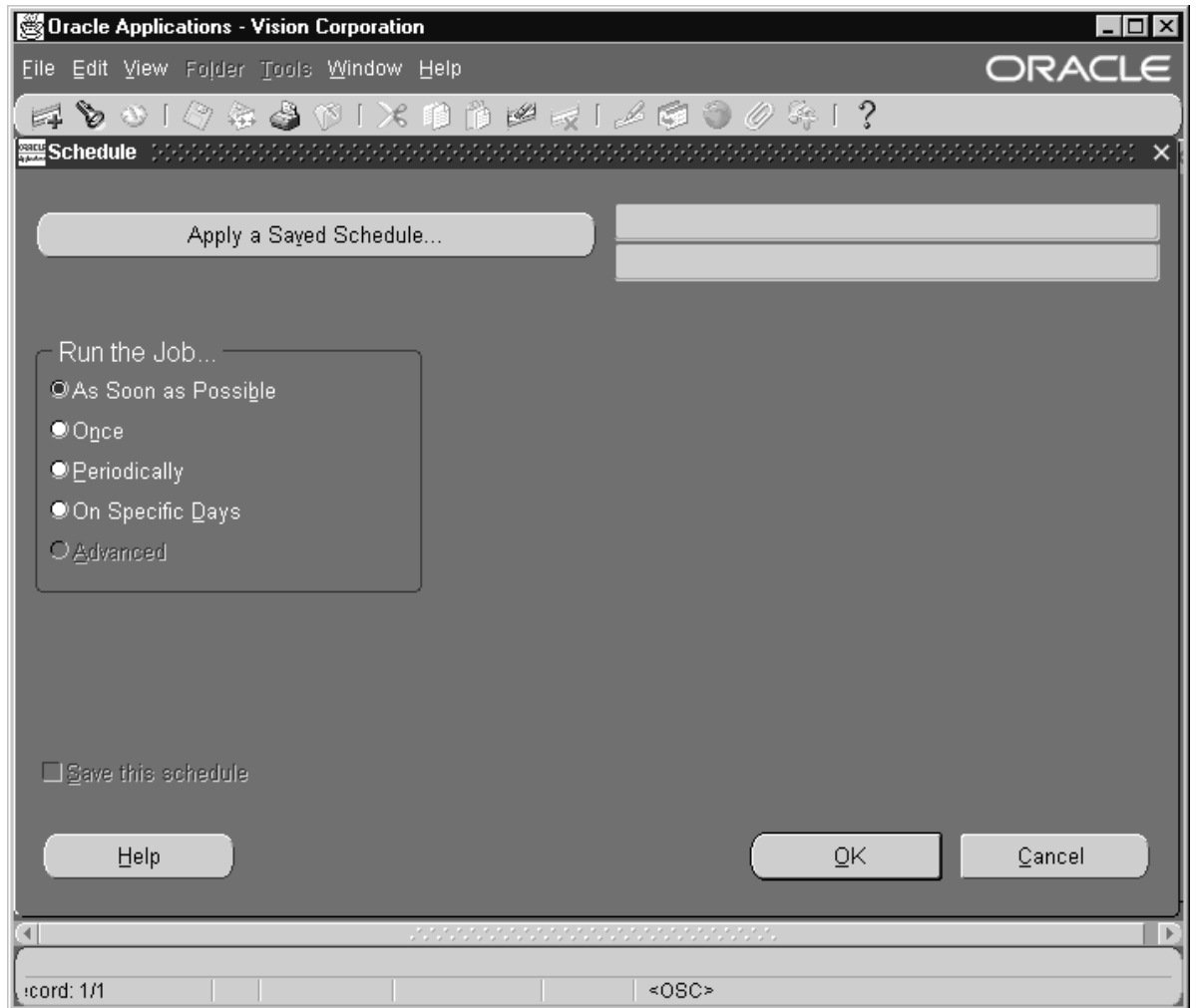
10. Choose a type of schedule from the following:

Apply a Saved Schedule   Allows you to re–use a previously defined and saved schedule. You may modify the saved schedule for this one submission or save the modified schedule with a new name for future use.

   Note: If you intend to use the saved schedule as defined, you can proceed to step 13.

As Soon as Possible   Submits your request as soon as possible. If you choose this schedule type, proceed to step 13.

Once	Submits your request once at the time and date you specify.
Periodically	Submits your request repeatedly at the interval you specify.
On Specific Days	Submits your request repeatedly on specific days of the week or month.
Advanced	This option is reserved for future releases.

11. Many schedule types require additional information to complete the schedule. Use the steps associated with your selected schedule type:
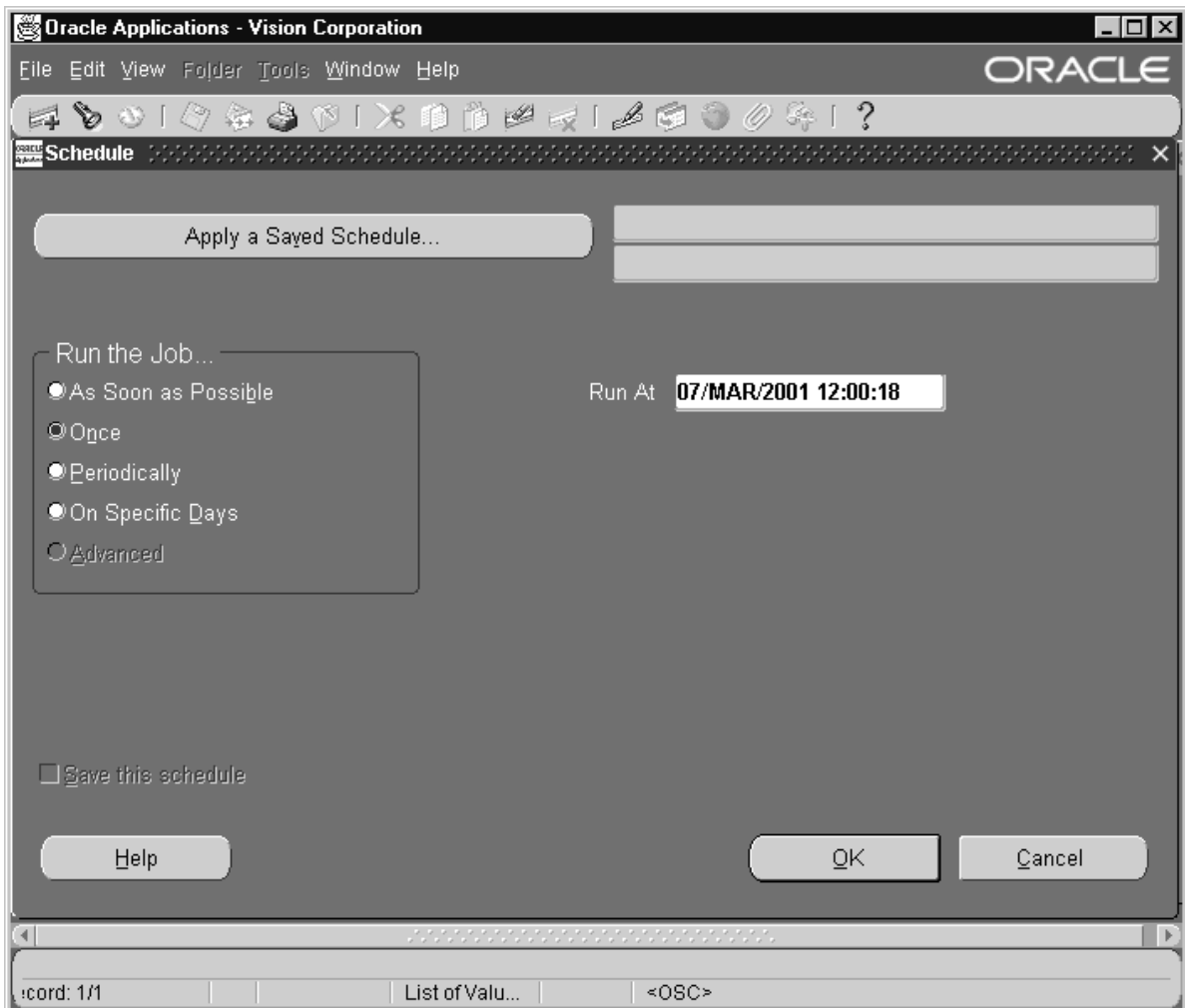
Once   When you choose Once, a special time field
                            appears that lets you specify the time of day you
                            want to submit your request. Use the calendar by
                            selecting the List of Values icon in the field to select
                            a date and time to submit your request.

Periodically   When you choose Periodically, several new fields
                            appear that let you specify the interval of minutes,
                            hours, days, or months that you want to wait
                            before resubmitting a request. You can also specify
                            whether to count your interval from the requested

start time of the request or from the completion time of the request.

- Use the List of Values calendar to select start and end dates to define the period in which you want to submit your request.

Note: If you do not specify a start time, Oracle Applications uses the value from your user profile option Concurrent:Request Start Time or the current time as the default.

Note: Whether a request completes successfully or in error, Oracle Applications immediately submits the next run only if the next requested start date and time is on or before the end date and time you specify. If you do not specify an end date, the request or request set repeats indefinitely until you cancel it. See: Cancelling Requests: page 7 – 12.

- Select the interval from the poplist and enter the number of intervals between each submission of your request.

- Choose to count your interval from the beginning or completion of the prior run.

- If your request contains date parameters, you can choose "Increment date parameters each run" to have the value for that parameter be adjusted to match the resubmission interval. For example, if the value for the parameter is 25–JUL–1997 07:00:00 and your interval is monthly, the parameter is adjusted to 25–AUG–1997 07:00:00 for the next submission.
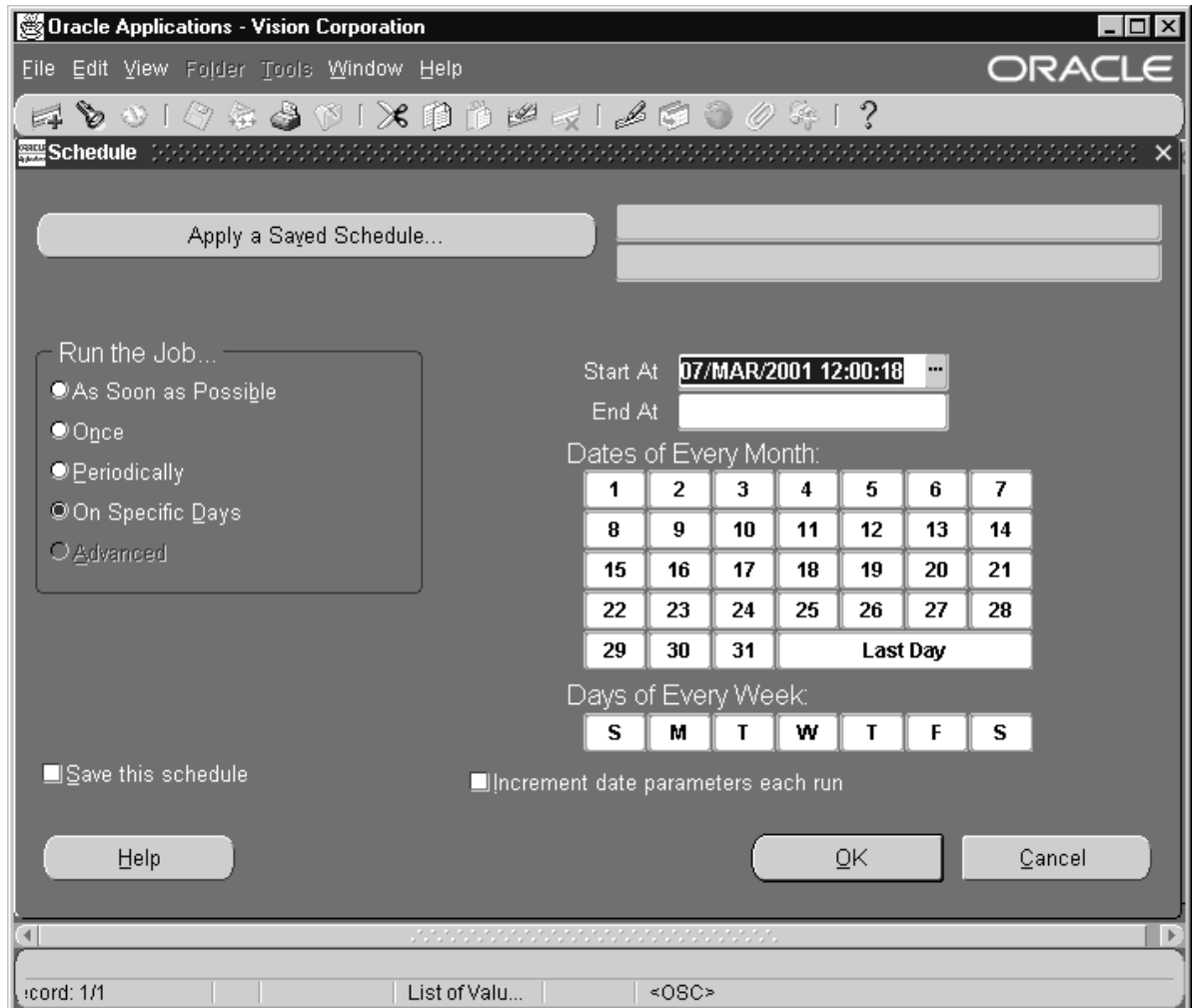
On Specific Days   When you choose On Specific Days, new fields and calendars appear that let you specify which day of the week and/or month to submit your request.

- Use the List of Values calendar to select start and end dates to define the period in which you want to submit your request.

Note: If you do not specify a start time, Oracle Applications uses the value from your user profile option Concurrent:Request Start Time or the current time as the default.

Note: Whether a request completes successfully or in error, Oracle Applications immediately submits the next run only if the next requested start date and time is on or before the end date and time you specify. If you do not specify an end date, the request or request set repeats indefinitely until you cancel it. See: Cancelling Requests: page 7 – 12.

- Use the monthly calendar template to specify dates during the month to submit your request. You can choose the date by clicking it. When you select a date such as the 5th, your request is resubmitted on the 5th of each month until the end date is reached.

- Use the weekly template to specify which day of the week to schedule your request.

☞ **Attention:** You can select as many dates as you require.

12. To save your schedule, check the Save this schedule check box. You must also provide a unique name for each schedule you save. Optionally, enter a description of your schedule.
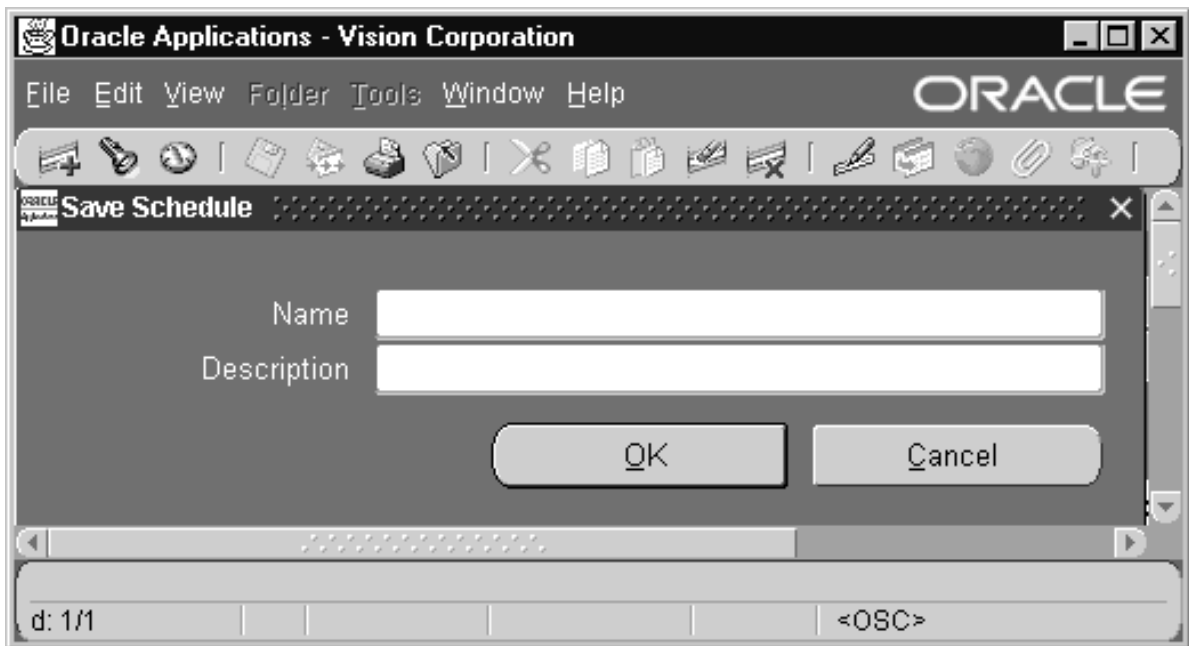
13. Choose **OK**.

Defining Completion Options

14. In the Upon Completion... region, use the Save all Output Files to write your request output to a file. If you wish to view your output online, you must use this check box.

15. Choose **Options...**
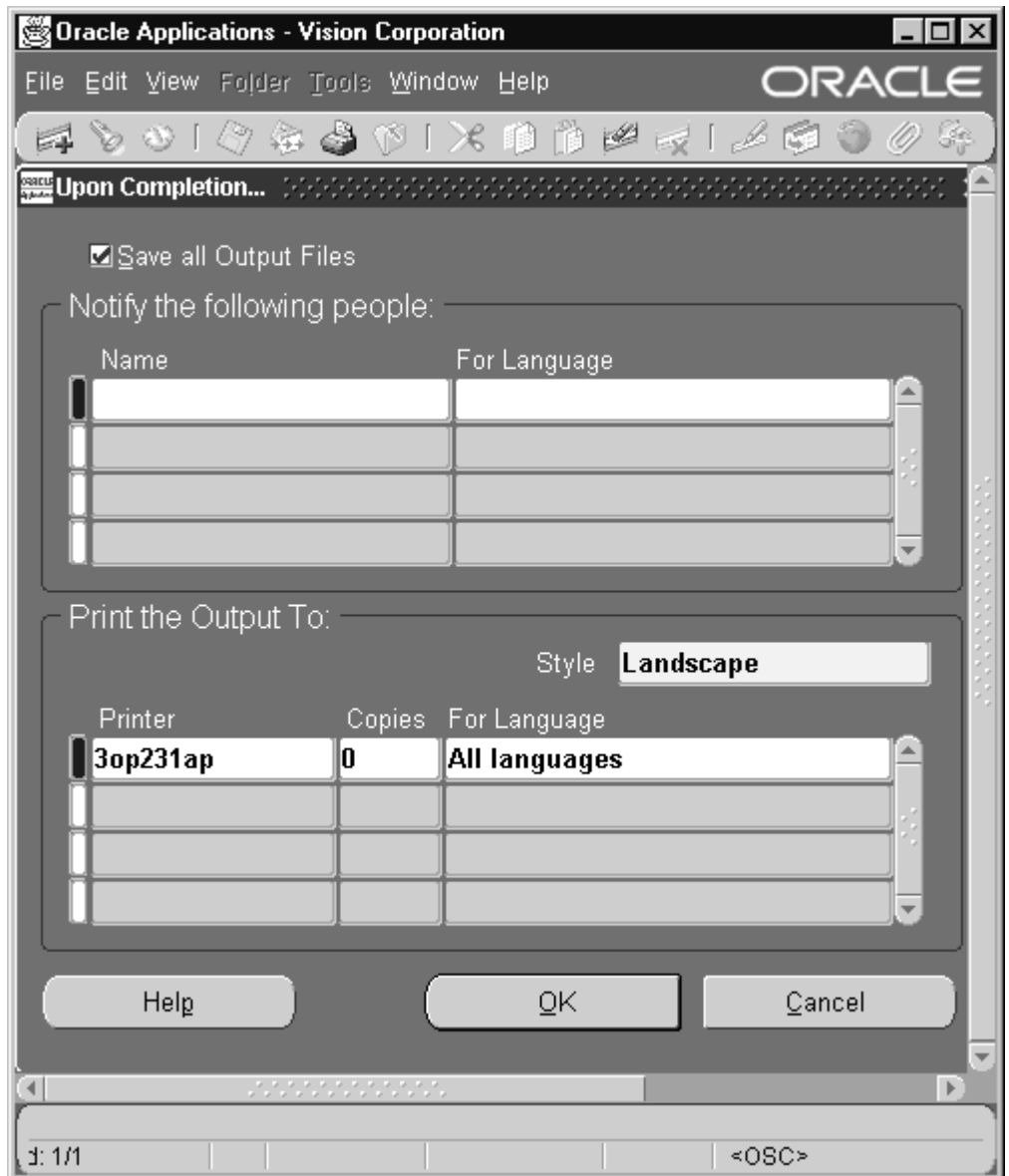
Note: Oracle Applications automatically uses the default values determined by your logon and profile options as listed below:

Logon	Used as the default for the notification field.
Printer	Determines the default printer.
Concurrent: Report Copies	Used as the default for the number of copies for the printer defined in the Printer profile option.
Concurrent: Save Output	Determines whether to save your report output by default.

In some cases the defaults are determined by the program definition.

16. Specify additional people to notify, or replace your name if you do not want to be notified.

17. Select a language for each person notified.

18. Select a print style from the poplist.

19. Use the LOV to select the printers you want used to produce a hard copy of your report. Each printer will produce at least one copy of the report. If you need more than one copy for a particular printer, use the Copies field to enter the number of copies you want printed.

    Note: Some requests may have a required Style or Printer that you cannot change.

20. Choose **OK.**

21. When you are done specifying scheduling and completion options, choose **Submit**.

    Once you submit your request, the Requests window opens and provides you with the current status of your request and the request ID number.

    Oracle Applications assigns a request ID to each request submission so that you can identify the results of the request when it is complete. You can use the request ID to query for your request output in the Requests window. Oracle Applications also assigns a new request ID number to each resubmission of a request and displays the request ID in the log file of the previous request.

22. If you wish to submit another request, simply repeat Steps 1 through 21. All the requests that you submit for the current session appear in the Requests window.

See Also

_____

Rerun a Prior Request

You can resubmit any request you previously submitted that is part of your current responsibilities request security group. The previous requests are displayed in a Find window when you choose the Copy... button. The list of requests include all of the requests you submitted that are part of your current responsibilities request security group and were submitted after the last time your System Administrator ran the Purge Concurrent and/or Manager Data program

▶ **Resubmit a request:**

1. Navigate to the Submit Request window.

2. Choose the Copy... button

3. Select a request from the Find window and choose OK.

   The request information such as, request name, parameters, and schedule appear in the Submit Requests window. You can modify the request at this time or resubmit as is.

4. Choose the Submit button.

_____

Submitting a Request Set

Submitting a request set is very similar to submitting a request. You use the same menu path for both, however, when you choose Request Set, the Submit Request Set window is opened.
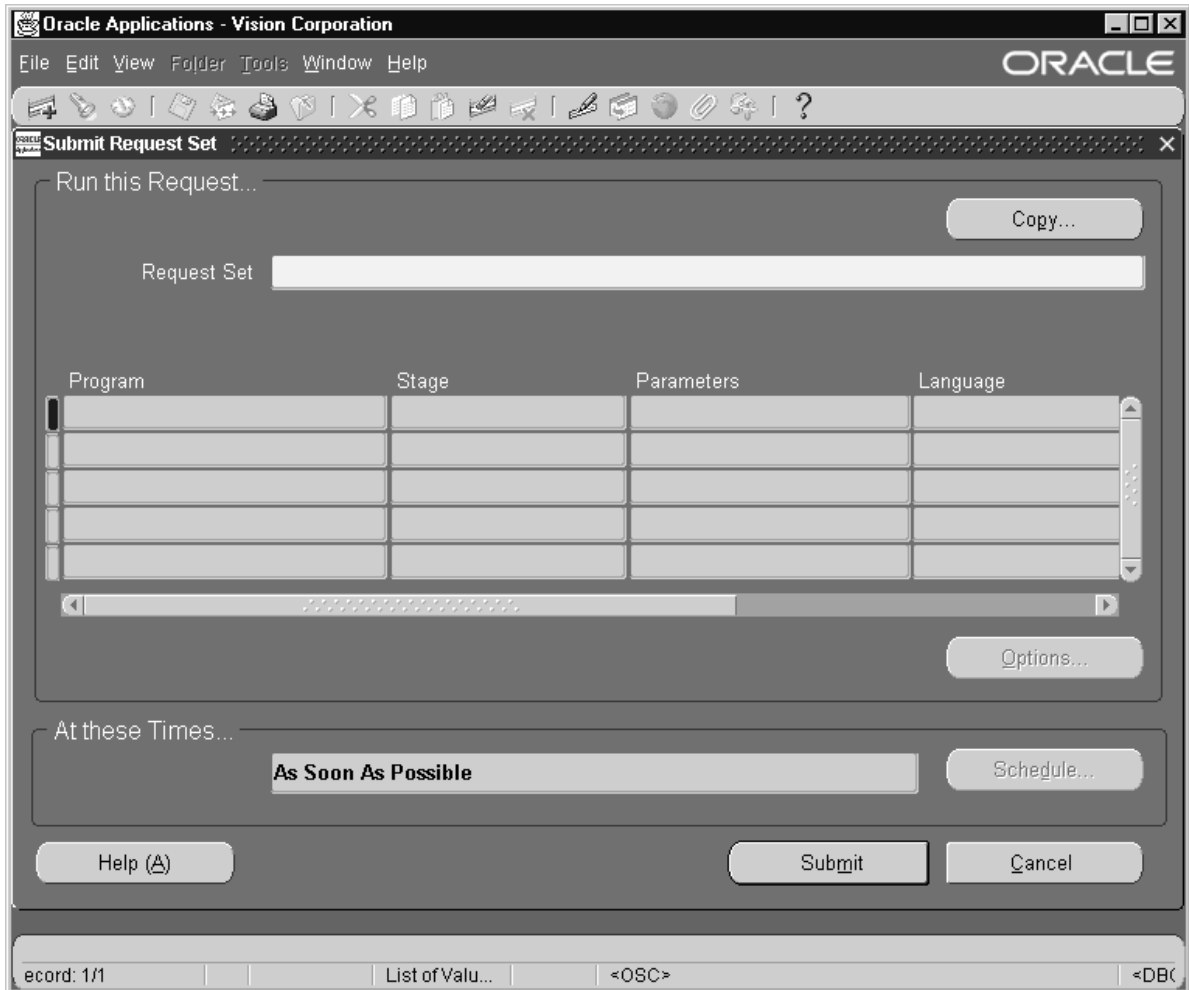
▶ **To submit a request set:**

- The steps for submitting a request set are very similiar to those for submitting a single request.

1. Check Request Set in the Submit a New Request window and choose OK.

2. In the Submit Request Set window enter the name of the Request Set.

   Alternatively, choose the Copy... button to use a previously defined request set submission.

3. The requests assigned to the request set are displayed in the multi–row region and may be modified for this request set submission.

  – When you move your cursor to the Parameters field for a request, Oracle Applications displays a Parameters window specific to that report. If there are no parameters, then the field is disabled.

  – When you finish entering the required parameter values for a request, choose OK to close the window.

  – If you wish to define completion options, open the Upon Completion... window for each request and enter your completion options. See Defining Completion Options: page 6 – 21

☞ **Attention:** Multilingual requests can not be submitted as part of a request set.

Note: If you wish to view a request's output online, you must check the Save all Output Files check box for that request in the Upon Completion... window.

4. Choose the Schedule window to define a schedule for this request set submission. See Defining Submission Schedule: page 6 – 14

5. When you submit a request set, Oracle Applications assigns a request ID to the request set as well as to each request in the request set. The request ID for each request is displayed in the output and log files of the request set. Oracle Applications also assigns a new request ID to each resubmission of a request set, and displays the request ID of the new request set in the log file of the previous request set.

See Also

Using Standard Request Submission: page 6 – 10

Defining Request Sets

By defining request sets, you can submit the same set of requests regularly using a single transaction. You use the Request Set window to create and edit request sets. Alternatively, you can use the Request Set wizard to create simple request sets. Refer to the user's guide for your Oracle Applications product to learn how to access the Request Set window.

☞ **Attention:** Some Oracle Applications products do not allow you to create request sets. These products do not have the Request Set window available.

Defining a Request Set
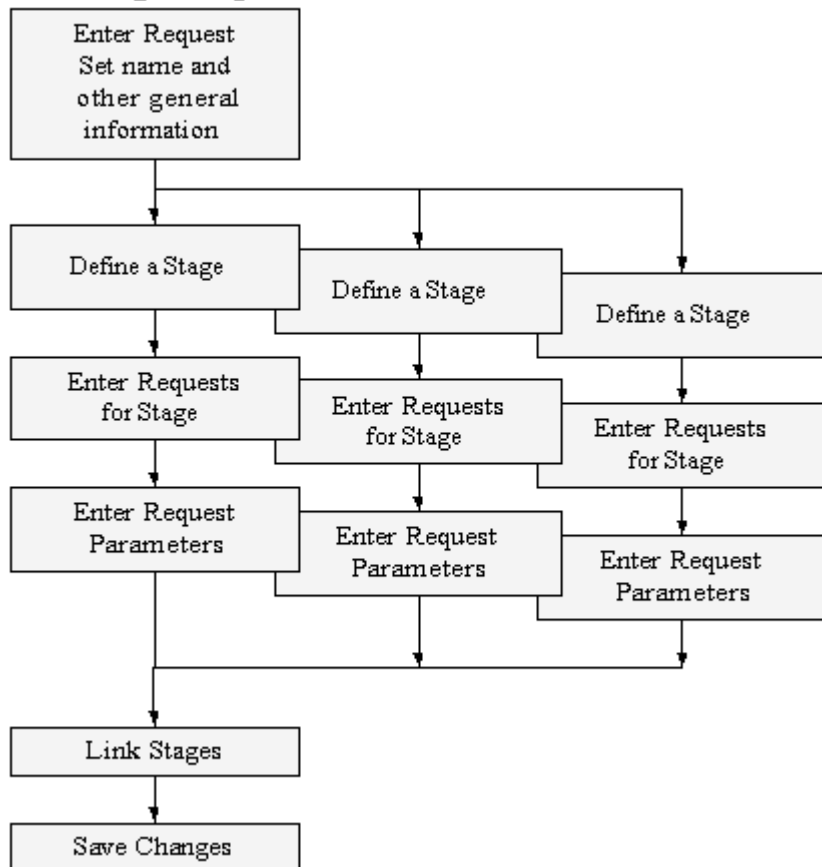
Organizing Requests with Stages

Request sets are divided into one or more "stages" which are linked to determine the sequence in which your requests are run. Each stage consists of one or more requests that you want to run in parallel (at the same time in any order). For example, in the simplest request set structure, all requests are assigned to one stage. This allows all of the requests to run in parallel.

```
Request Set
    ┌─────────────┐
    │ Stage 1     │
    │   request 1 │──► End
    │   request 2 │
    │   request 3 │
    └─────────────┘
```
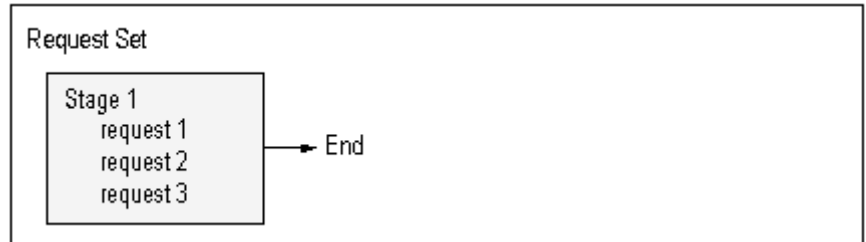
To run requests in sequence, you assign requests to different stages, and then link the stages in the order you want the requests to run.

For example, if you had three requests: Request 1, Request 2, and Request 3, that needed to run in the sequence 1, 2, 3, then you would assign each request to a different stage and link the stages in that order, as shown below.

```
Request Set
  ┌──────────┐    ┌──────────┐    ┌──────────┐
  │ Stage 1  │    │ Stage 2  │    │ Stage 3  │
  │          │─►  │          │─►  │          │──► End
  │ request 1│    │ request 2│    │ request 3│
  └──────────┘    └──────────┘    └──────────┘
```
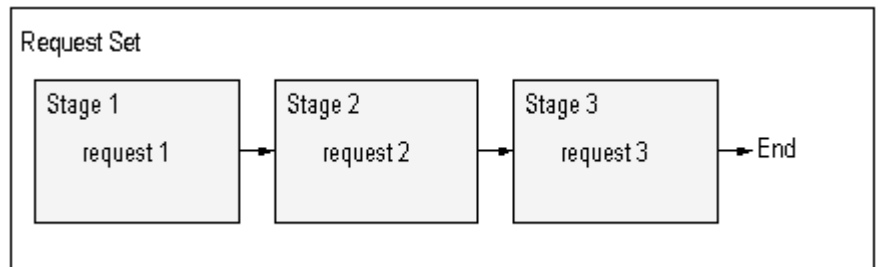
The concurrent manager allows only one stage in a request set to run at a time. When one stage is complete the following stage is submitted. A stage is not considered to be complete until all of the requests in the stage are complete. One advantage of using stages is the ability to run several requests in parallel and then move sequentially to the next stage. This allows for a more versatile and efficient request set.

For example, suppose you have three requests that can run in parallel, and a fourth request that cannot run until after all of the first three have

completed. Furthermore, you have a fifth request and sixth request that can run in parallel, but are dependent on the completion of the fourth request. Using stages you can put requests 1, 2, and 3 in Stage 1 and link it to Stage 2, which contains only request 4. Link Stage 2 to Stage 3 which contains requests 5 and 6.
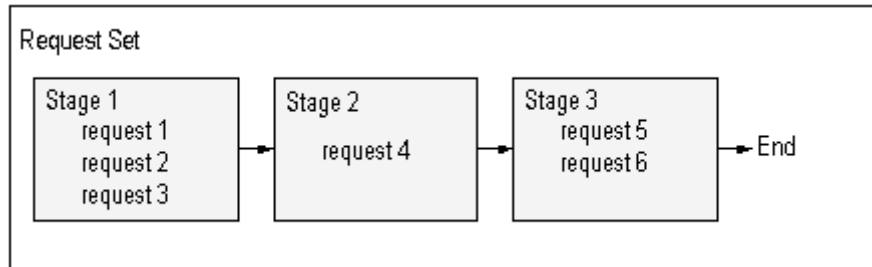
Using Stage Status

Like request sets and concurrent requests, stages can complete with different statuses. Each stage can complete with a status of Success, Warning, or Error. You can use these completion statuses to structure your request set, by defining which stage will follow the current stage based on its completion status.

For example, you could define a request set as follows: Stage 1 begins the set. If Stage 1 completes with status Success, Stage 2 is executed. If Stage 1 completes with status Warning, Stage 3 is executed. If Stage 1 completes with status Error, Stage 4 is executed. This setup is illustrated in the following diagram.

Request Set

Stage 2

request 4

Success

Stage 1
request 1
request 2
request 3

Warning

Stage 3

request 5

Error
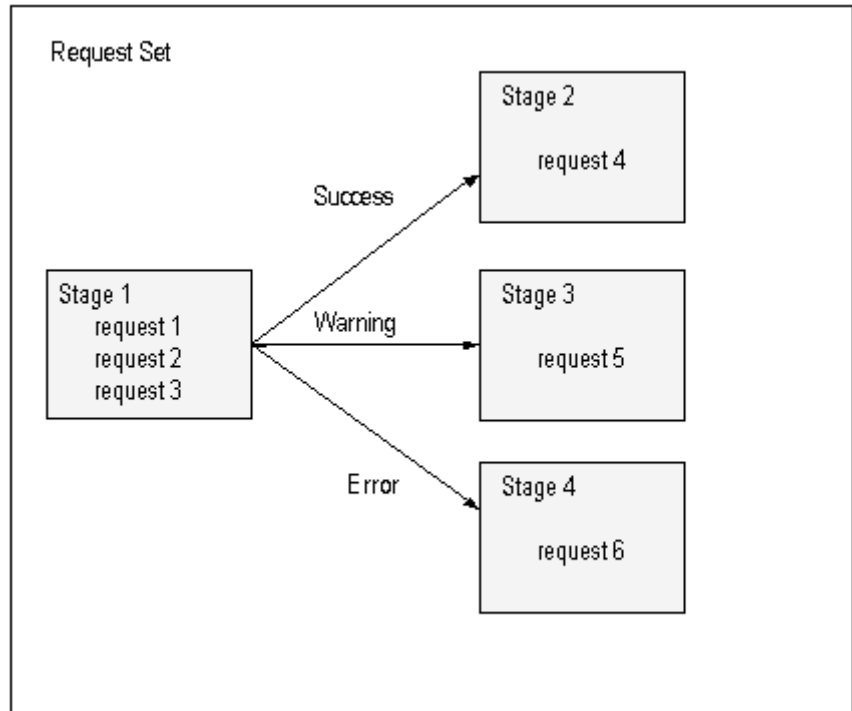
Stage 4

request 6

In this example, the "Standard" function calculates the status for a stage using the statuses of the requests within the stage. The Standard function sets the stage status to Success if all of the requests in a stage complete with a status of Success. If one or more requests complete with a status of Error, then the status of the stage is Error. For a stage's status to be Warning, one or more of the requests must have a status of Warning and no request may have a status of Error.

Linking of Stages

There are no restrictions on linking stages within a request set. Any stage may be linked to any other stage, including itself. Two or more links can point to the same stage. For example, Stage 1 can link to Stage 2 if the completion status of Stage 1 is Success or Warning, and link to Stage 3 if the status is Error.

Request Set

Stage 2 — S — Stage 4 — S — Stage 6

Success (S)

Warning (W)

Stage 1

Start Stage

Error (E)

E | W   S | W

End Request Set

E | S | W

Stage 3 — W — Stage 5

S

E

Links can point to any stage in the set. The Request Set is completed when a stage ends with a status that does not specify a stage to follow.
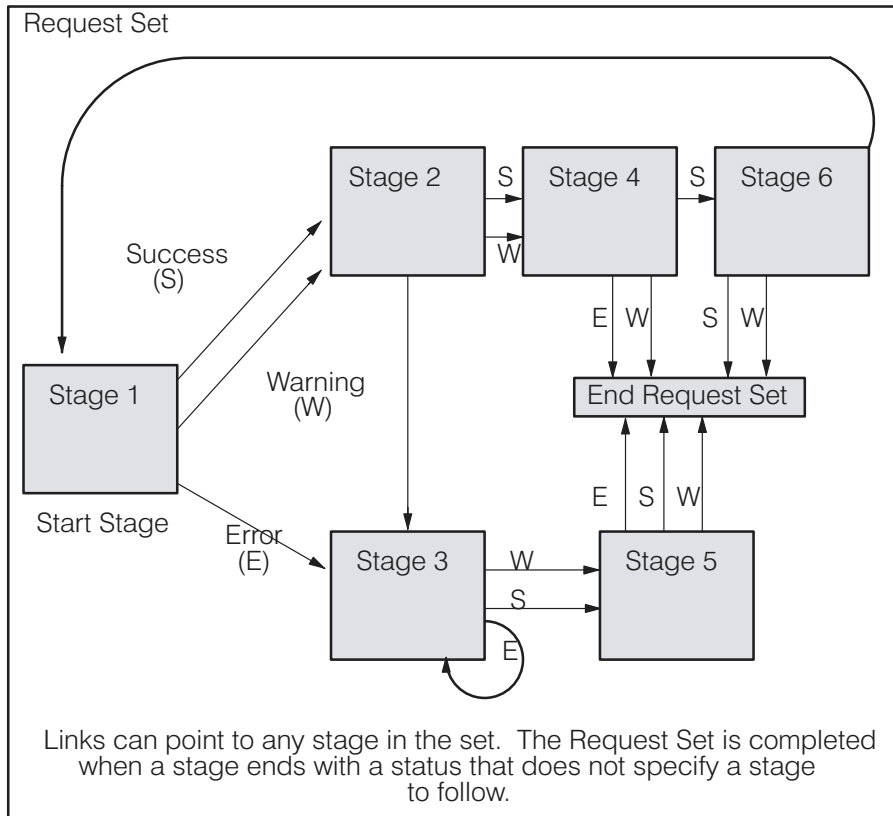
You determine the end of a request set by not specifying a followup stage for each completion status. You can end a request set after any stage in the request set. When any stage completes with a status that does not link to another stage, the request set ends.

You can use the linking of stages to control your request set. In previous releases you had three options: run in parallel, run sequentially, and run sequentially but abort on Error. All of these are easy to recreate using the request set wizard. You can use the Request Set Wizard button in the Request Set window to start the wizard. The wizard takes your input and creates the request set as follows:

Run in Parallel   Creates one stage containing all of the requests you wish to run in parallel.

Run Sequentially   Creates a separate stage containing the request or requests for each step in the sequence and link in the appropriate order.

Run Sequentially but abort on Error	Sets up your sequence the same as it did for Run Sequentially, but when it links the stages, it does not enter a follow up stage as a link in the Error completion status field.
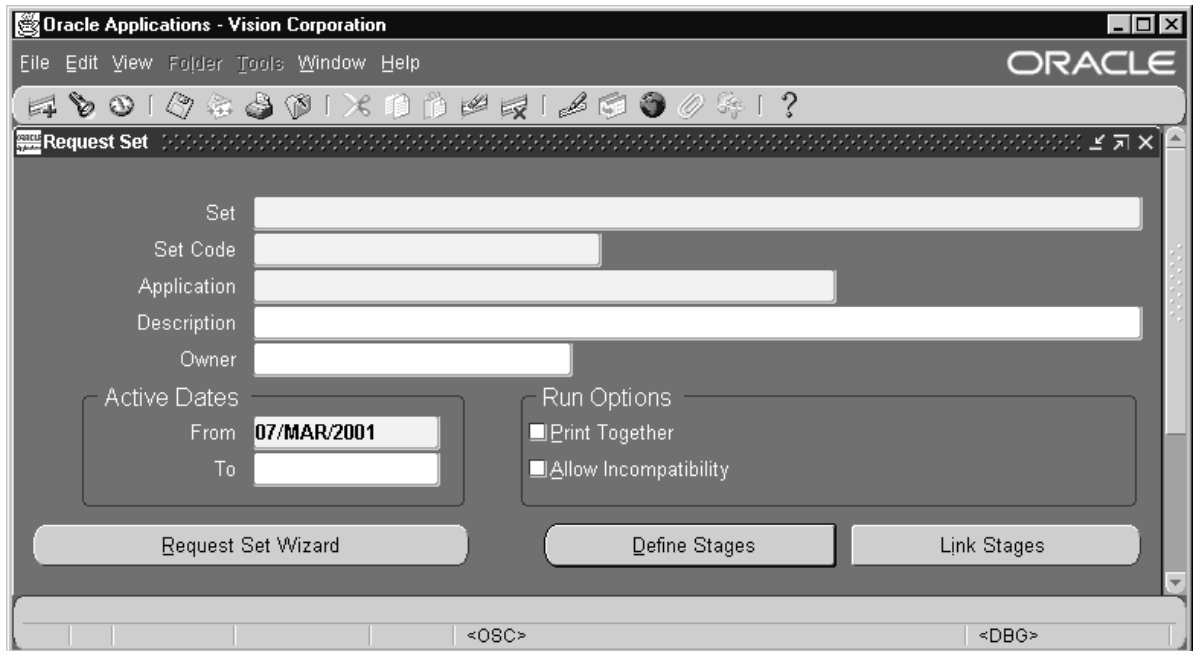
► **To create a request set:**

1. Navigate to the Request Set window.

2. Enter a Name for your request set.

3. Enter a Set Code for your request set. This name is used internally to reference your request set.

4. Enter the Application with which you want to associate your request set.

5. Enter a Description of your request set if you like.

6. The Owner field defaults to your username and can only be changed by your system administrator.

7. Enter the Active Dates From and To fields to define an effective period when you and others can run the request set. If the current date is outside the range you define, the request set will not be available in the Submit Requests window.

8. Check the Print Together check box to send all your requests to the printer together when they complete, or uncheck the check box to send each request one at a time to the printer as it completes.

9. Check the Allow Incompatibility check box to allow your system administrator to specify programs that this request is incompatible with (may not run with). Leave Allow Incompatibility unchecked to specify that this request set may run with all other concurrent requests or request sets.

10. Choose **Define Stages** or **Link Stages** if you have finished defining your stages. See Define Stages: page 6 – 35 or Link Stages: page 6 – 40
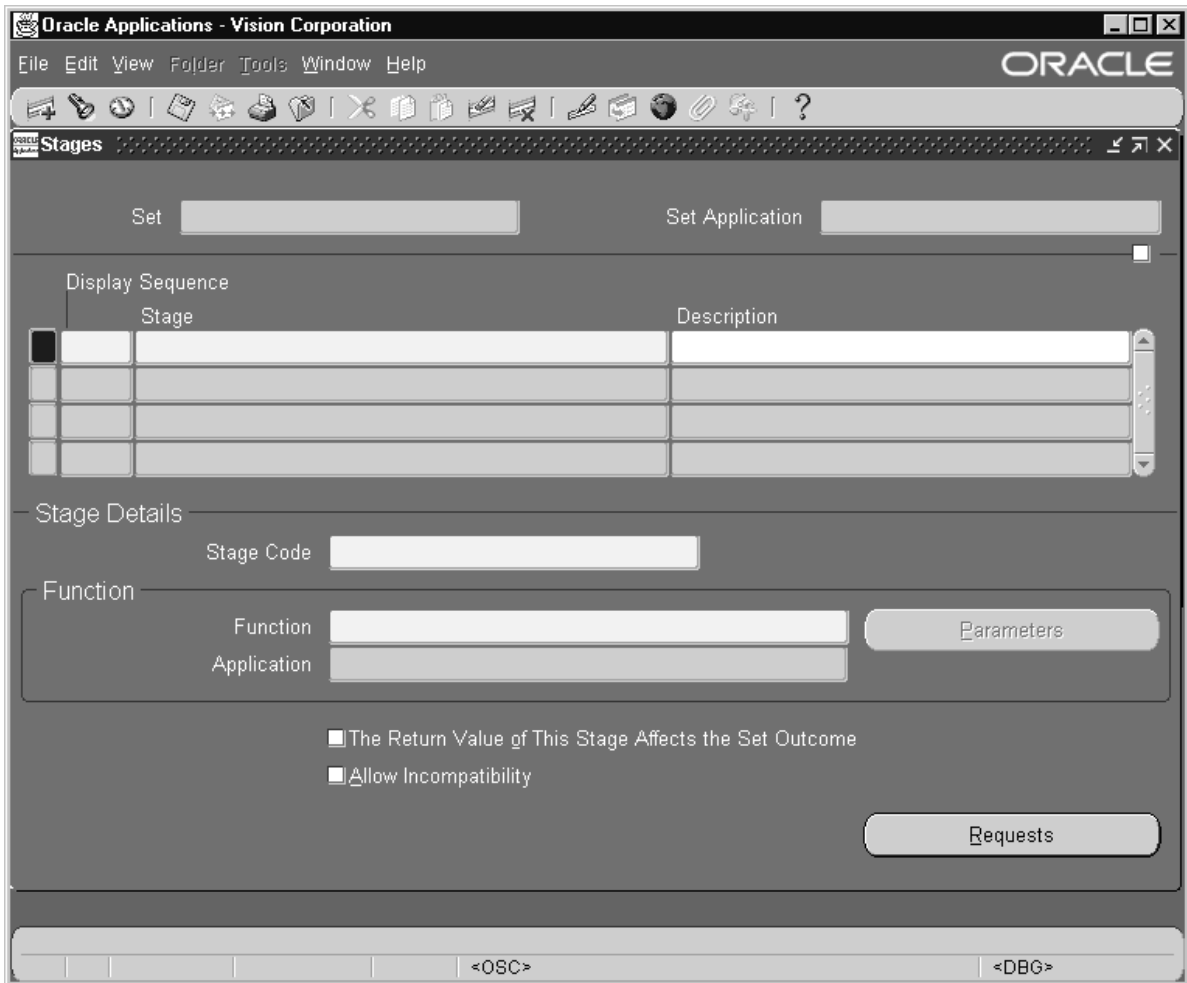
▶ **Defining Stages**

1. The value for the Display Sequence is defaulted in sequence as you enter your stages. You may change the display order of the stages by modifying this field.

2. Enter a Name for the stage.

3. Enter a Description of your stage if you like.

4. Enter a Stage Code for the stage. This code is used internally to reference the stage.

5. In the Function field of the Function region, use the List of Values to select a function. The default value for this field is the Standard Stage Evaluation function. This function bases its completion status on the normal completion status of the requests it contains. Other functions may be provided by your Oracle product. For a description of these functions, refer to the user's guide for that product.

6. Use the "The Return Value of this Stage Affects the Set Outcome" check box if you want to ensure that the request set's completion status is equal to the completion status of this stage.

   Note: If you choose this check box for more than one stage, the completion status of the request set will equal the completion status of the last of these stages to run within the set.

7. Use the Allow Incompatibility check box to allow your system administrator to specify programs that this stage is incompatible with (may not run with). Leave Allow Incompatibility unchecked to specify that this stage of the request set may run with all other concurrent requests or request sets.

8. Choose **Requests**.

Stage Requests window

In the Stage Requests window you define which requests you want to include in the stage.

9. Select the report or program you want to include in your request set. A description of the request you choose and its associated application appears in the Description and Application fields.

   The list of requests you can choose includes the requests that your responsibility's request group lets you access from the Submit Requests form.

10. Use the Allow Stage Function to Use This Program's Results check box to indicate which programs or reports should be included.

11. The Print Options region reflects the options for the current request. Specify the number of Copies of output to print, the Style to print, the Printer to print to, and whether to save the output to an operating system file.

   Standard Request Submission saves these options so you do not have to specify them again when you run the request set. If you do not wish to specify these options for each request when you define the set, Standard Request Submission uses the values of your personal profile options as the default when you submit the request set. See: Default Values of Concurrent Processing Options: page 6 – 8.

   Note: Some requests may have a required Style or Printer that you cannot change.

12. When you are done with the Print Options, choose Parameters to display the Request Parameters window.
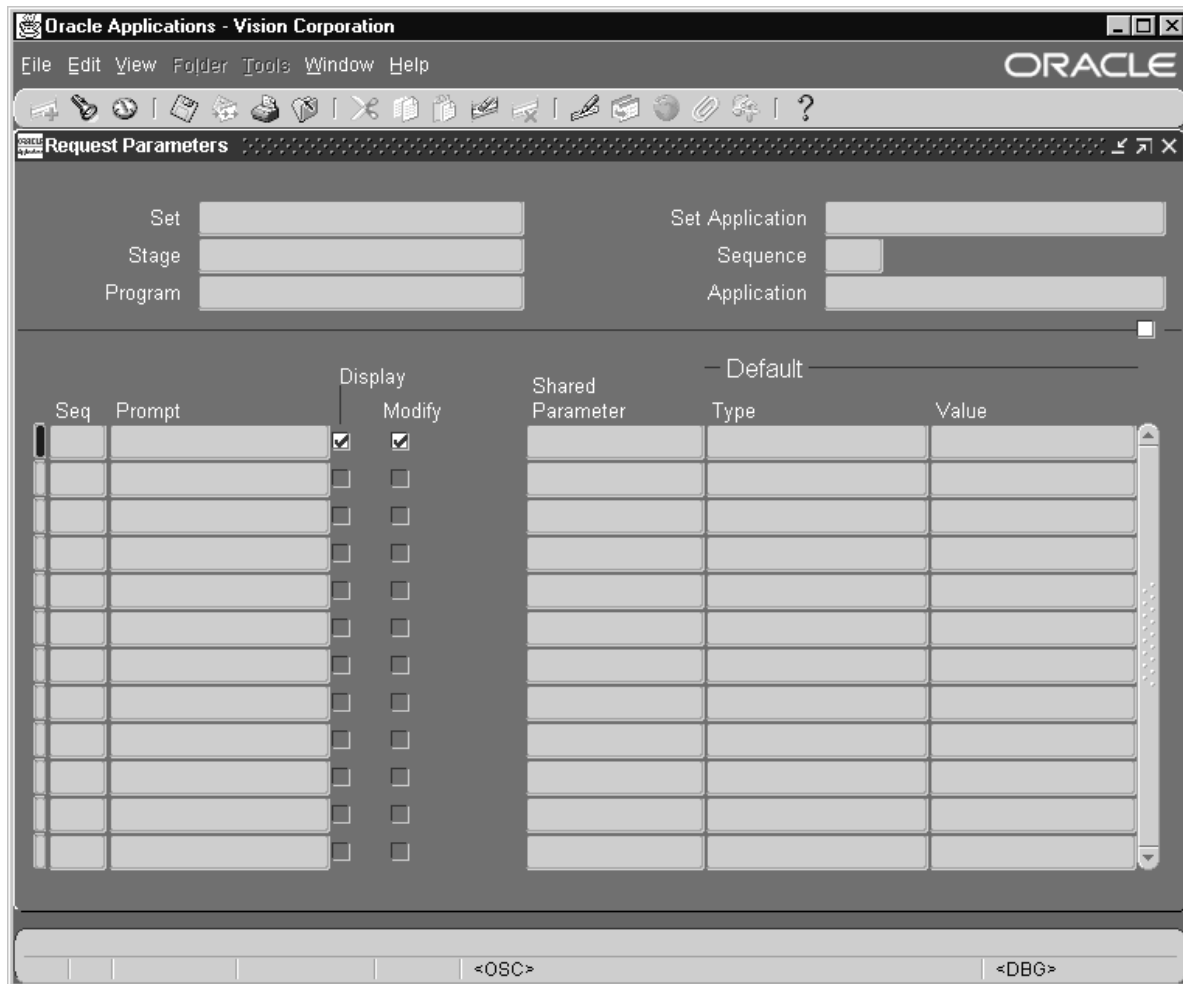
Request Parameters Window

The Request Parameters window lets you customize the parameter
values of a specific request in a request set. The fields at the top of the
Request Parameters window list general information about the current
request set and the request for which you can customize the parameter
values. The multi–row portion of the window lists the parameters for
that request.

1. The Sequence field displays the order in which each request
   parameter appears when you run the request in the Submit
   Requests window (lower numbers appear before higher numbers).
   Only your system administrator can change a parameter's order.

2. The Prompt field is a display–only field that shows the request parameter's prompt.

3. Check the Display check box to specify that you can see a request parameter at submission time, or uncheck the check box to specify that a parameter should not be displayed at submission time.

4. Check the Modify check box to specify that you can insert or change the value for a request parameter at submission time, or uncheck the check box to specify that a parameter cannot be changed at submission time.

5. Use the Shared Parameter field to set a default value for a parameter that occurs in more than one report or program of a request set. Once you enter the same parameter label in the Shared Parameter field for each occurrence of the same parameter, the value that you assign to the first occurrence of the parameter becomes the default value for all subsequent occurrences of the parameter. The shared parameter label simply enables you to set an initial default value for all occurrences of the same parameter so you can avoid typing the same value all over again for every occurrence of the parameter.

For example, suppose you define a request set that includes three reports, and all reports include a parameter called "Set of Books". You want the "Set of Books" parameter to default to the same value in all reports. To accomplish this, enter a label called "Book" in the Shared Parameter field for the first occurrence of this parameter. You can also assign a value in the Default Value field of this parameter now, or wait until you run the request set to assign a default value when the parameter first appears. Enter the label "Book" in the Shared Parameter field of all other occurrences of the "Set of Books" parameter in your request set. When you submit this request set from the Submit Requests window, every parameter that you label "Book" defaults to the value you assign to the first occurrence of the "Set of Books" parameter.

☞ **Attention:** Note that if you later change the value of a parameter that contains a shared parameter label, you change only the value for that instance of the parameter, and not the value for all other occurrences of that labelled parameter.

We recommend that if you make a parameter with a shared parameter label modifiable, that you also display the parameter so you can always see what the parameter's current value is. This helps reinforce the understanding that a later value change to one labelled parameter cannot propagate a value change to all other similarly labelled parameters.

6. Optionally enter a Default Type and Value for the parameter.

7. Save your work.

8. Go back to the Stage Requests window and repeat Steps 9 through 11 to add more requests to the request set stage.

   You can select a request more than once if you want to run the same request with different default parameter values.

9. To start a new stage, return to the Stage window and choose New Record from the File Menu.
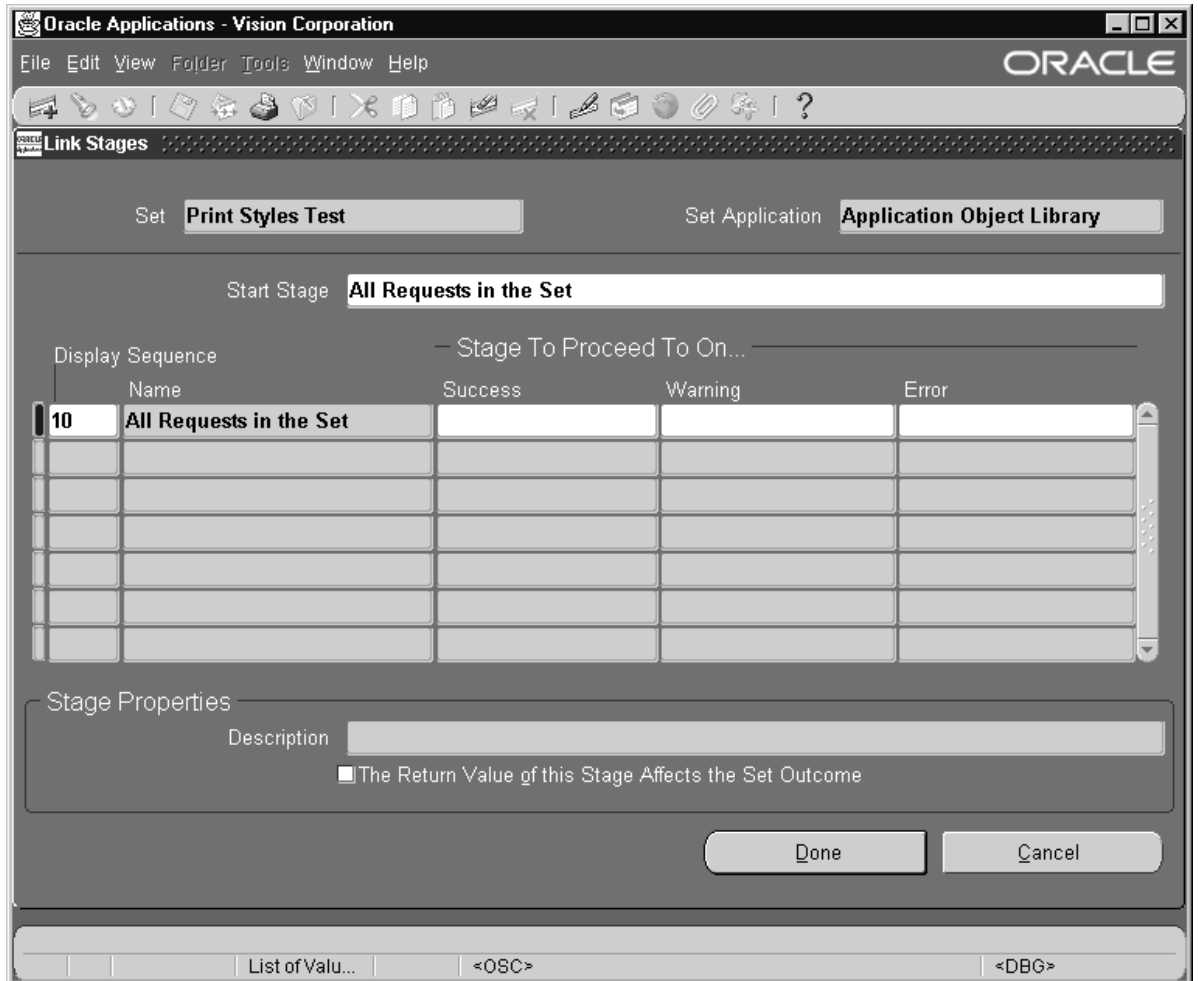
▶ **Link Stages**

1. Enter the Start Stage. The stage you enter here is the first stage submitted for the request set.

2. Enter the stages you want to run following the first stage in the Success, Warning, and Error columns. To ensure that a particular stage follows the preceeding stage regardless of the completion status, enter the desired stage in all three columns. To stop the request set if a stage ends in Error, leave the Error column blank. Any time you do not specifically indicate which stage should follow for a completion status, the request set will exit on that completion status.

   In the example shown in the following table, the request set will always exit if any stage returns a completion status of error. In addition, stages C and D will terminate the request set regardless of their completion status. If Stage A returns a status other than Error, Stage B will be submitted. Finally, when Stage B completes with a status of Success, it is followed by Stage C, or if the status is Warning, Stage D will follow.

   Example:

Display Sequence	Name	Success	Warning	Error
1	**Stage–A**	Stage–B	Stage–B	
2	**Stage–B**	Stage–C	Stage–D	
3	**Stage–C**			
4	**Stage–D**			

3. Choose **Done.**

Who Can Use a Request Set

After you define a request set, it becomes your private request set. You can run it as long as you have access to a standard Submit Requests window that does not limit access to specific requests.

Other users can run the request set only if your system administrator assigns the request set to their responsibility's request group. It is possible to have a request set in your request group that contains individual requests that are not in your request group.

You can only edit request sets that you own. You can add any requests in your request group to the request set. You can delete any request from the request set, regardless of whether that request is in your request group. To update information about an individual request in the request set, however, the request must be in your request group.

Use the Request Sets window to edit a request set, and the Submit Requests window to submit a request set to be run.

See Also

Submitting a Request Set: page 6 – 23

Monitoring Oracle Applications Reports and Programs

This chapter tells you how to view and monitor your requests. Specifically, this chapter tells you how to:

- Use the Find Requests window
- Use the Requests window
- View the progress of a concurrent request
- Cancel a request or change its processing options

Viewing Requests

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.

Monitoring Requests: page 7 – 9

Using the Requests Window

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, or find the position of your request in the queues of available concurrent managers.

You can navigate to the Requests window using the Navigate window. Different Oracle Applications products use different menu paths in the Navigate window to access the Requests windows.

Suggestion: Refer to the Menu Paths appendix of your application's user's guide to learn how to access this window from your application.

Attention: If your system administrator sets the profile option Concurrent:Report Access Level to "User," the Requests window displays the concurrent requests for the current user. If your system administrator sets the profile option to "Responsibility," the Requests window displays the concurrent requests for the current responsibility in addition to requests for the current user.

▶ **To use the Find Requests window:**

1. Upon initial navigation to the Requests window, you are directed to the Find Requests window.

    Use the Find Requests window to specify the types of requests you want to see. You can choose to view your completed requests, your requests in progress, or all of your requests by selecting the appropriate option group.

    In addition, you can look for a particular request using the Specific Requests option group. Use the find criteria fields as you would for any other find window to specify as many or as few details as you need to locate the desired request information.

Note: You can use the Specific Requests region to view requests that you did not submit by entering a requestor other than yourself or using wildcards such as the "%" to query all requests.

Note: Depending on the value of the profile option Concurrent: Report Access Level, some concurrent requests may not be shown.

Note: Although you can list all submitted concurrent requests, you can generally only view detail, report output, and request log file information for your own concurrent requests. However, if the user profile *Concurrent:Report Access Level* is set to *Responsibility,* you can review the details of all requests submitted for the current responsibility and username.

2. Use the Order By poplist to specify the order in which you want your requests displayed.

▶ **To use the Requests window:**

1. Move your cursor to the record that represents the request you want to examine in detail.

Each record shows you the the request ID, request name, phase and status of the request, as well as the parameters used by the request. If the request is part of a request set, the request ID for the parent request is provided in the Parent column.

From the Requests window you can Cancel a request or put it on hold if the status of the Request is pending. If the status is completed, you can view the output or the logs generated by the request. Lastly you can always review the details of the request submission.

2. Choose **View Details...**

▶ **To review and update a request's schedule:**

The Date Started and Date Completed are displayed in thewindow's upper region.

1. Choose **Schedule...** to see more detailed information.

You can update the scheduling information for your request if it meets all of the following criteria:

  – you made the initial request.

  – the request has not yet run.

  – the program does not prevent request updates.

▶ **To review and update a request's completion options:**

Choose **Options...** from the **Upon Completion...** region to see:

- Names of people to notify
- Name of printer used
- Number of copies to print
- Print Style

You can update the completion option information for your request if it meets all of the following criteria:

    – you made the initial request.

    – the request has not yet run.

    – the program does not prevent request updates.

▶ **Tracking your request in the concurrent manager's queue:**

1. With your cursor on a record of interest in the Requests window, choose **Managers** from the Tools menu.

   This window lets you view your request's position within each available concurrent manager's queue, if the request has not run yet.

   Note: The Manager Log entry on the Tools menu is disabled for all users except the system administrator. This choice lets the system administrator open a window displaying the concurrent manager's log file for the request.

2. Choose the Manager Queue button to display the Concurrent Manager Queue window. This window displays the queue of requests waiting to be processed by the concurrent manager you select in the Concurrent Managers window.

▶ **To reprint your request:**

With your cursor on a record of interest in the Requests window, choose **Reprint...** from the Tools menu to reprint a request's output. When you choose Reprint..., a window appears allowing you to enter a printer, number of copies, and style for reprinting of the request. Choose **OK** in the Reprint window to reprint the request.

Note: This menu entry is disabled if the request has not yet run.

▶ **To view Request Diagnostics:**

With your cursor on a record of interest in the Requests window, choose **Diagnostics** to display a window containing information about when the request completed and if it did not complete, a message explaining why not.

See Also

Monitoring Requests: page 7 – 9

Viewing Request Output and Log Files

Oracle Applications allows you to view your log and report output files online with the Report File Viewer. The viewer provides navigational buttons that enable you to go directly to the first or last page of your report, or to move to the next or previous page. In addition, you can use **Go To Page** button to specify the page of the report you want to view. You can activate the viewer from the Requests window.

> **Note:** Some reports have special formatting characters that printers use to print special effects, such as boldfacing or underlining. If your computer does not support such special characters, you may see these characters when you view your report online. However, the report still prints correctly without displaying these characters.

▶ **To View Request Output:**

Choose **View Output**

▶ **To view requests log files:**

Choose **View Log** to display the request's error log file. If your request ends in error, you can view a log of the error messages. The log also contains information about the print options used and

a listing of child request IDs, if the original request is a parent request.

▶ **To save Request Output:**

Choosing **Copy File...** from the Tools menu displays the **Viewer Option** window which presents a poplist of output file formats for you to select from. Selecting one opens your browser window. From the browser window, you can use the native browser tools to save your request output to a file.

> **Note:** When you save the file, give the file an appropriate name and the correct extension. You must provide the correct extension to save and view the file properly.

Viewing Reports in HTML

Reports that produce an output other than a text file (for example HTML or PDF) are displayed in a browser. If you set the profile option VIEWER: TEXT to Browser, your text files are also displayed in a browser as opposed to the Report Viewer. VIEWER: TEXT may also be set to display your output in a text editor such as Microsoft Word, or in a spreadsheet such as Microsoft Excel.

You can use the Save As functionality of your browser to save an HTML report to your desktop. If your system supports multiple languages, you may have trouble with the saved output. Ask your system administrator for assistance with character set conversion from the server to your browser.

The name of the output/report file passed to the browser is created dynamically. The concurrent program name and the date on which the request was run are used to create the name of the file. The file extension is based on the Output Type" attribute of the concurrent program.

For example:

Request 1234 for the "Year End Exception Report" is run on September 27, 2001 and has an output file named o1234.out.

When you view this report online, 'Year End Exception Report_270901.html' is passed as the name of the file to the browser in the content header in addition to the mime–type. You can then save the file locally using this name.

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.

This section tells you how to monitor your concurrent requests and modify their options after you submit them to run.

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*. The table below lists each phase/status combination and describes its meaning in relation to a request.

If a request is pending, you can determine when it will start by using the Concurrent Managers For the Request window to review the request's position in the queues of current managers that can run that request (see Tracking your request in the concurrent manager's queue: page 7 – 4).

Concurrent Request Phase and Status

Phase	Status	Description
PENDING	Normal	Request is waiting for the next available manager.
PENDING	Standby	Program to run request is incompatible with other program(s) currently running.
PENDING	Scheduled	Request is scheduled to start at a future time or date.
PENDING	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.
RUNNING	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.
RUNNING	Resuming	All requests submitted by the same parent request have completed running. The Parent request resumes running.
RUNNING	Terminating	Request is terminated by choosing the *Cancel Request* button in Requests window.
COMPLETED	Normal	Request completed successfully.
COMPLETED	Error	Request failed to complete successfully.
COMPLETED	Warning	Request completed with warnings. For example, a request is generated successfully but fails to print.
COMPLETED	Cancelled	Pending or Inactive request is cancelled by choosing the *Cancel Request* button in the Requests window.
COMPLETED	Terminated	Request is terminated by choosing the *Cancel Request* button in the Requests window.
INACTIVE	Disabled	Program to run request is not enabled. Contact your system administrator.
INACTIVE	On Hold	Pending request is placed on hold by choosing the *Hold Request* button in the Requests window.
INACTIVE	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 run–alone requests.

Table 7 – 1 (Page 1 of 1)

Individual Request Progress

Generally when you submit a request, its phase is Pending, which means that it has not yet started running. When it does start running, its phase changes to Running. Upon completion the status of the request becomes either Success, Warning or Error. If your request ends in warning or error, you can use the Diagnostics button in the Requests window to view any diagnostic messages stored in the log file.

Request Set Progress for Stages

When you submit a request set, all the requests in a stage run simultaneously and the phase and status of the set begins as Pending Normal until an available concurrent manager can process it. When a concurrent manager becomes available, the stages's phase and status change to Running Paused as the stage waits for all of its requests to finish. Then the stage changes from Running Paused to Running Normal to write completion information in the report and log files. Finally, the stage phase changes to Completed and its status becomes Success, Warning, or Error.

Progress of Individual Requests in a Stage

When a stage submits its requests, all requests start as Pending Normal, then change to Running Normal, and finally end as either Completed Success, Completed Warning, or Completed Error.

Progress of Linked Stages

When you submit a request set with more than one stage, the request set submits all the stages but only runs one stage at a time, ensuring that each stage completes before submitting the next. Each stage shows a phase of Pending and a status of Normal while it waits for a concurrent manager to process it. As the next available concurrent manager processes the stage, the request set phase and status changes to Running and Paused, as the first stage begins to run. After each stage finishes, the request set temporarily changes to a Normal status to check whether the stage ended in error and to determine whether to stop or which stage should be processed next based on how you linked the stages when you defined the request set.

Once the check is done for a completed stage, the set goes back to Paused status during which the next stage runs. The set alternates between Normal and Paused status for each stage in the set. The set itself resumes running (Running Normal), after all the requests finish, to write completion information in the report and log files. The set

ends in a Completed phase, either with Success, Warning or Error status. A request set ends when a stage ends with a completion status that does not link to a subsequent stage.

See Also

Monitoring Requests: page 7 – 9

Cancelling Requests

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:**

1. Navigate to the Find Requests window.

2. Check My Requests in Progress.

3. Choose **Find.**

4. 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.

☞ **Attention:** If you cancel a request set, Oracle Applications automatically cancels all requests in the set.

☞ **Attention:** 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.

5. Select Save from the File menu.

See Also

Monitoring Requests: page 7 – 9

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.

▶ **To change the request options of a request or request set that has not yet started running:**

1. Navigate to the Find Requests window.

2. Check Specific Requests.

3. Enter the Request ID for the Request you want to modify.

4. Choose **Find.**

5. From the Requests window, you can cancel a request or request set, put a request or request set on hold, or take a request or request set off hold using the buttons in the window. A request or request set on hold does not run until you take it off hold.

☞ **Attention:** The cancel or hold action does not go into effect until you choose Save from the File menu or the toolbar.

6. With your cursor on the request you wish change and choose View Details.

   If the request is pending or scheduled, you can change the request parameters, language and territory of the output, and if you want to save your output.

7. Choose **Schedule** to change:

   • start and end dates for recurring requests

   • schedule dates

8. Choose **Options** to change:

   • people notified and the associated language.

   • printers

   • number of copies

☞ **Attention:** For requests in a request set, you can change the values of the request options if the requests are in your responsibility's request group.

See Also

Monitoring Requests: page 7 – 9

Working with Attachments

This chapter teaches you how to use the Attachments feature to link data such as images and word processing documents to your application data. Specifically, this chapter tells you how to:

- Attach a document to an Oracle Applications record

- View an attachment

- Copy or delete an attachment

About Attachments

To illustrate or clarify your application data, you can link
non–structured data such as images, word processing documents,
spreadsheets, web pages, or video to more structured application data.
For example, you could attach images to inventory items or video to
manufacturing operations.

Invoke the Attachment form to view an attachment by pressing the
Attachment toolbar button.

The toolbar Attachment icon indicates whether the Attachments feature
is enabled in a form block. When the button is dimmed, the Attachment
feature is not available. When the Attachment feature is enabled in a
form block, the icon becomes a solid paper clip. The icon switches to a
paper clip holding a paper when the Attachment feature is enabled in a
form block and the current record has at least one attachment. There is
also a profile option, Indicate Attachments, that allows you to turn off
indication of attachments when querying records for performance
reasons.

> **Note:** The current version of the Attachments feature supports
> attachments to a restricted set of applications data. Check your
> product–specific documentation to determine if the Attachments
> feature is enabled for your Oracle Applications product, and if so,
> for what data.

Attachments Window
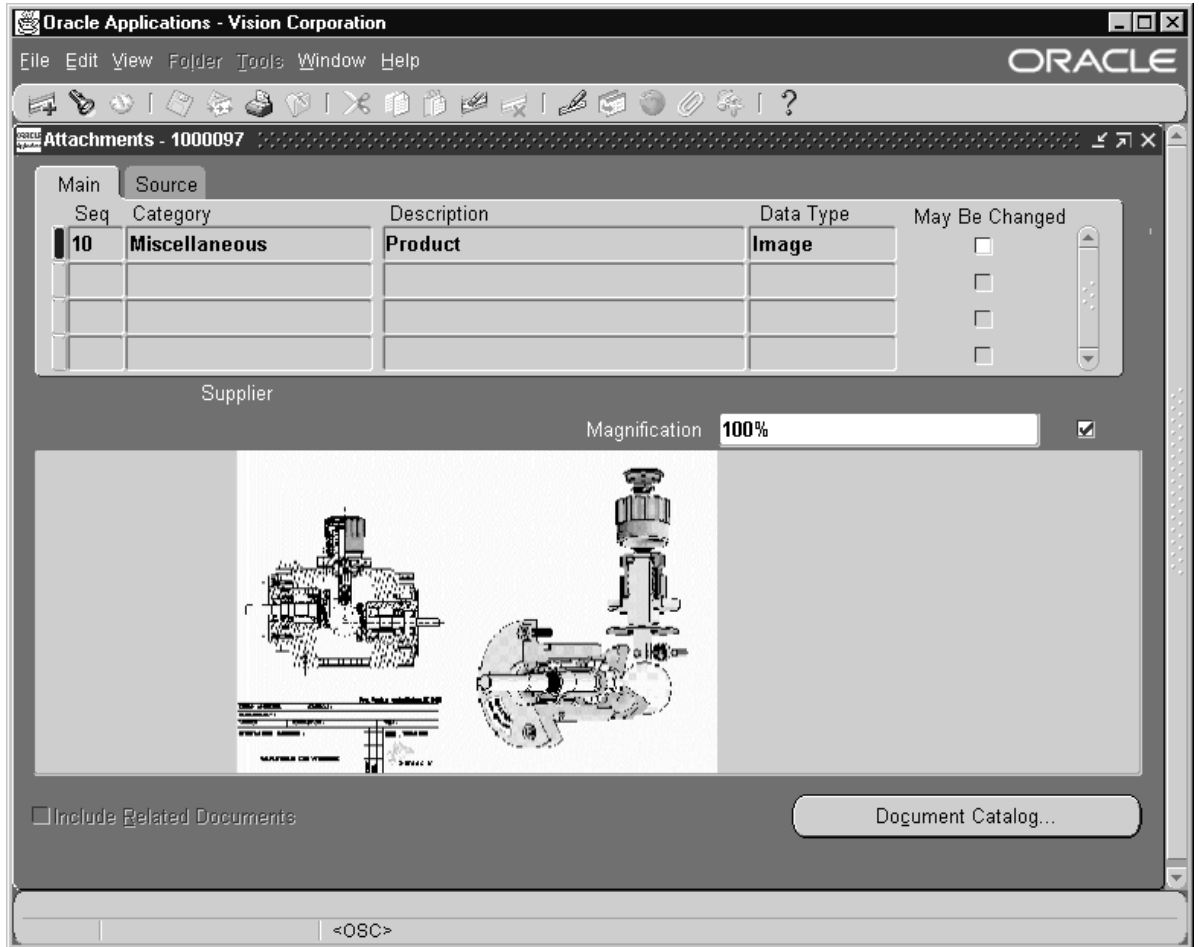
Use the Attachments window to view or delete existing attachments, and create new attachments. You must provide the following information when you create an attachment:

Category

The category controls which forms can access the document. Each form that enables Attachments must list which document categories it can access. A "Miscellaneous" category will be assigned to each form registered for Attachments to facilitate "cross–form" visibility of Attachments.

Datatype

An attached document can be:

Document Reference	A reference to any type of document stored in a database that is accessed through a Document Management system.
Short Text	Text stored in the database containing less than 2000 characters.
Long Text	Text stored in the database containing 2000 characters or more.
File	A file that requires other server applications to view, such as Microsoft Word or Microsoft Excel, image files such as .JPG files, or other types of files. When you attach or create a File type document, the document is loaded into the database. When a File document is selected, the lower half of the Attachments window displays an "Open Document" button that invokes a web browser and passes the file to the browser.
Web Page	A URL reference to a web page that you can view with your web browser. You must define your web browser in the profile option *Web Browser* to view a web page attachment.

File or URL

If the document is a file, specify the location of the document. The document will then be loaded into the database. If the document is a web page, specify the web page URL, such as http://www.oracle.com.

May be Changed

The May be Changed checkbox indicates if you are able to edit the attachment.

Document Block

The document block is the section of the window below the multi–line attachment block. The document block displays the current document in the attachments block, or it displays an Open Document button that opens your document for viewing with a browser.

To improve performance while scrolling through lists of attachments, uncheck the coordination checkbox. The document block will not update until you turn coordination on again.

☞ **Attention:** If you maximize the document block window, no other operations can be performed until you restore the block to its original state.

Adding an Attachment

You can attach a document to any record for which attachments are enabled, such as a supplier definition or an Order Line.
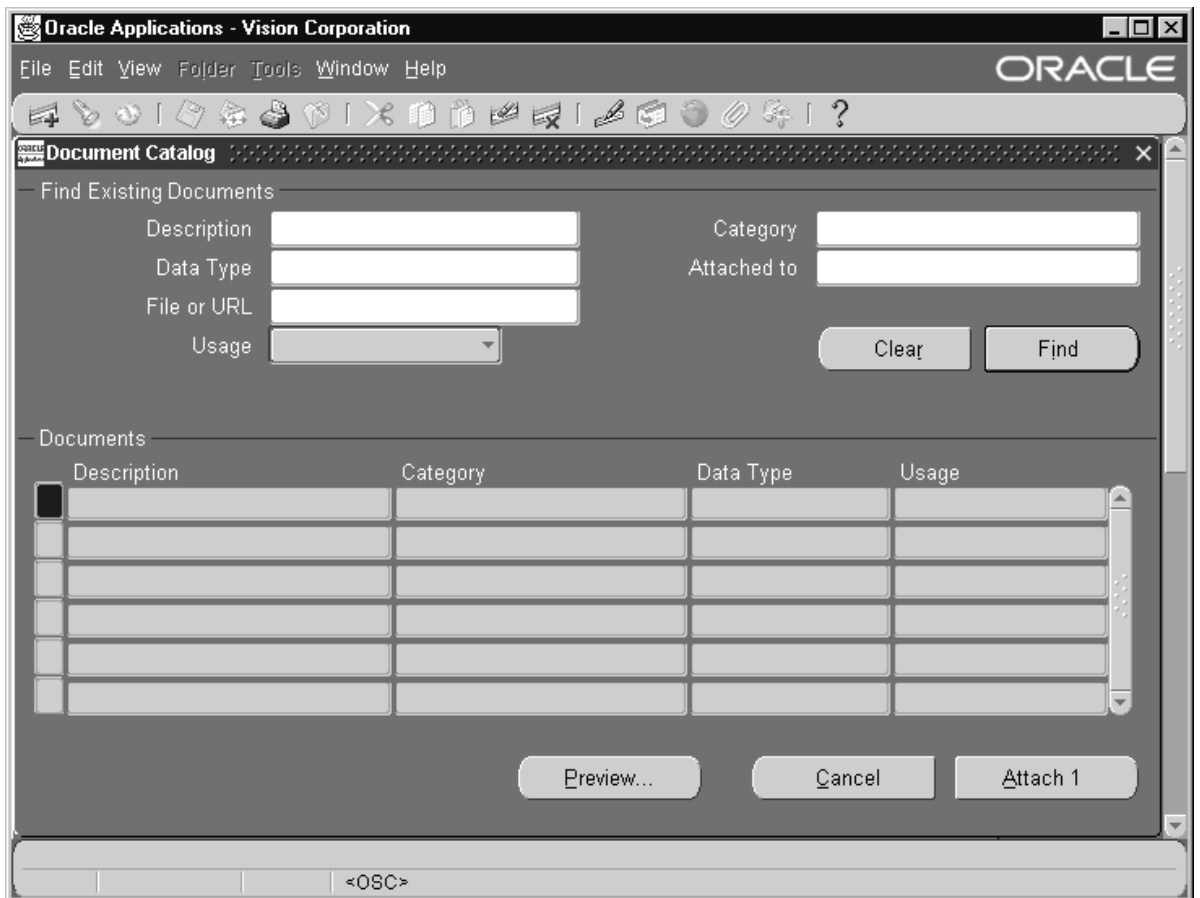
▶ **To attach a new document to an Oracle Applications record:**

1. In an application window, query or enter a data record.

2. Choose the Attachment toolbar icon. The Attachments window opens.

3. Enter a category, a description, and a data type.

4. Type in your document text, or specify a file name or web page URL.

5. Save your work.

▶ **To attach an existing document to an Oracle Applications record:**

1. In an application window, query or enter a data record.

2. Choose the Attachment toolbar icon. The Attachments window opens.

3. Choose the **Document Catalog...** button. The Document Catalog window opens.

4. Query an existing document.

5. Check one or more documents.

6. Choose the **Attach (number of documents)** button.

7. Save your work.

Viewing an Attached Document

▶ **To view an attached document:**

1. Query a record.

2. Press the Attachment toolbar icon.

3. Move your cursor to the document you want to view. The attachment appears in the document block or you must press the Open Document button to see the document in a browser.

Deleting an Attachment

When you delete an attachment, you merely remove the association between a record and a document. The document itself is not removed from your file system or database.

▶ **To delete a record's attachment:**

1. In an application window, query a data record.

2. Choose the Attachment toolbar icon.

3. Move your cursor to the document you want to delete.

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

5. Save your work.

Copying an Attachment from Another Record

Oracle Applications keeps a catalog of documents that have been attached to applications data records so far; therefore, you can take advantage of this catalog if you want to attach an existing document to another data record.

▶ **To copy an attachment from another record:**

1. In an application window, query the record that you want to attach a document to. (Don't query the record that already has the attachment.)

2. Choose the Attachments toolbar icon.

3. Choose **Document Catalog....**

4. Enter query criteria in the Attached To: field for the application object you want to copy attachments from.

5. Choose **Find**.

6. Check one or more documents.

7. Choose the **Attach (number of documents)** button.

8. Save your work.

Uploading and Downloading Attachment Files

▶ **To attach an existing file to an Oracle Applications record:**

1. In an application window, query or enter a data record.

2. Choose the Attachment toolbar icon. The Attachments window opens.

3. Use the List of Values to choose a Category.

4. Optionally enter a Description.

5. Use the List of Values to choose a Data Type.

6. Use the Tab key to open the Upload window in a separate browser window.
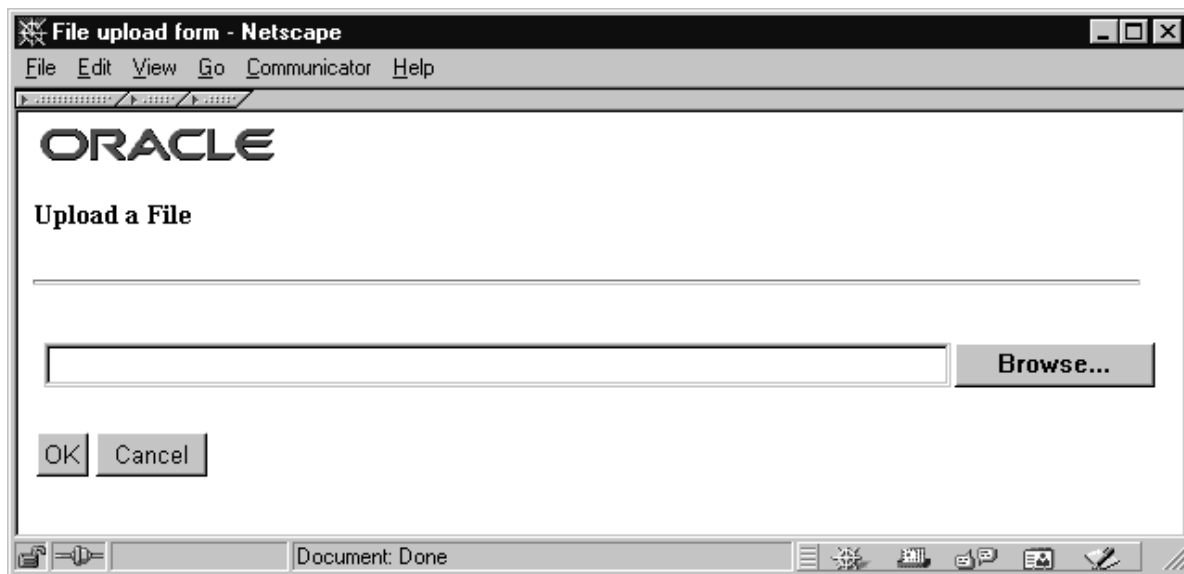
7. You can either enter the path for the file you want to attach or use the Browse button to choose a file.

8. Choose OK and follow the instructions in the browser window.

9. Click on Yes in the Decision window.

▶ **To open an uploaded attachment:**

Choose the Open Document ... button

Documents Window

Use the Documents window to add existing documents, or create new attachments in the Document Catalog. These documents will then be available for use as attachments from the Attachments window. Creating a document in the Documents window is much like creating an attachment in the Attachments window with the addition of security, usage, and effective date information.

Category

The category controls which forms can access the document. Each form that enables Attachments must list which document categories it can access. A "Miscellaneous" category will be assigned to each form registered for Attachments to facilitate "cross–form" visibility of Attachments.

Datatype

An attached document can be:

Document Reference	A reference to any type of document stored in a database that is accessed through a Document Management system.
Short Text	Text stored in the database containing less than 2000 characters.
Long Text	Text stored in the database containing 2000 characters or more.
File	A file that requires other server applications to view, such as Microsoft Word or Microsoft Excel, image files such as .JPG files, or other types of files. When you attach or create a File type document, the document is loaded into the database. When a File document is selected, the lower half of the Attachments window displays an "Open Document" button that invokes a web browser and passes the file to the browser.
Web Page	A URL reference to a web page that you can view with your web browser. You must define your web browser in the profile option *Web Browser* to view a web page attachment.

File or URL

If the document is a file, specify the location of the document. The document will then be loaded into the database. If the document is a web page, specify the web page URL, such as http://www.oracle.com.

Usage

Specify how this document may be used.

Standard	Allows this document to be used until its Effective Date expires.
Template	Use this option if you are creating a document that is meant to be modified before use.
One–Time	This option limits the use of the document to one time.

Security Type

Your attachment may be secured, so that it may only be used as an attachment by other users that share the same Organization ID, Set of Books, or Business Unit as those of the Owner.

☞   **Attention:** Assigning security to an Organization ID limits the access of the document to that Organization only. Child Organizations will not have access.

Security Owner

Enter the name of the Owner of the document. You can also limit the use of the document to a single user by entering the user's name in the Owner field and not selecting the Share checkbox. If you want other users to have access to the document you must check the Share checkbox.

Using User Profiles

This chapter teaches you about Oracle Applications user profiles. User profiles give you control over the behavior of certain Oracle Applications features. Specifically, this chapter tells you:

- How to set user profile options

- Which user profiles are common to all Oracle Applications products

Overview of User Profiles

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.

Oracle Applications uses a set of user profile options that are common to all the application products. In addition, 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.

Basic Business Needs

Oracle Applications user profiles help you satisfy the following business needs. You should be able to:

- 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

Major Features

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. Each user profile option ordinarily exists at each level. For example, Oracle Applications provides a Site–level Printer option, an Application–level Printer option, and so on. Oracle Applications enforces the level hierarchy to ensure that a higher–level option value overrides a lower–level value. For example, if your Site–level Printer value is "New York", but your

User–level Printer value is "Boston", you can be assured that your reports print to the Boston printer.

Definitions

User Profile Options

Changeable options that affect the way your applications run.

User Profile Levels

User profile options exist at four different levels: Site, Application, Responsibility, and User levels. 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. Higher–level option values override lower–level option values.

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.

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.

Determining User Profile Option Values

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. For example, suppose your system administrator initially set your Printer option only at the Site and Responsibility levels. When you sign on to Oracle Applications, the Printer option assumes the value set at the Responsibility level, since it is the highest–level setting for that option. If you are not satisfied with that setting, you can set your own preference at the User–level, since your User–level setting overrides the Responsibility–level setting.

> **Note:** Some option values can only be changed by the system administrator. You can view the value of such a user profile option, but you cannot modify that value. For example, you can view the value of the user profile option Concurrent:Request Priority, which is set at the User–level, but only your system administrator can modify its value for you.

If the default value of a user profile option at any level is inappropriate, your system administrator can change it at any time. Any change your system administrator makes takes effect as soon as you log on again or change responsibilities.

Setting Your Personal User Profile

You can change a user profile option value using the Profile Values window. The Menus appendix in your product's reference guide tells you how to navigate to this menu.

Using this window, you can display all your options and review the values your system administrator has set for them. You can also change those options that are updatable if you like. Changes you make to a User–level profile option take effect when you either change responsibilities or close and re–login into the application. If changes are made in character mode you must follow the same steps to apply the changes to applications running in GUI mode. Changes you make to your User–level options are still in force when you log in again.

If you never set your own User–level option values, your user profile options assume the Site–, Application–, Responsibility–, or User–level values your system administrator has set for them.

Oracle Applications - Vision Corporation

File Edit View Folder Tools Window Help

ORACLE

Personal Profile Values

Profile Name	Default Value	User Value

ord: 1/1   <OSC>
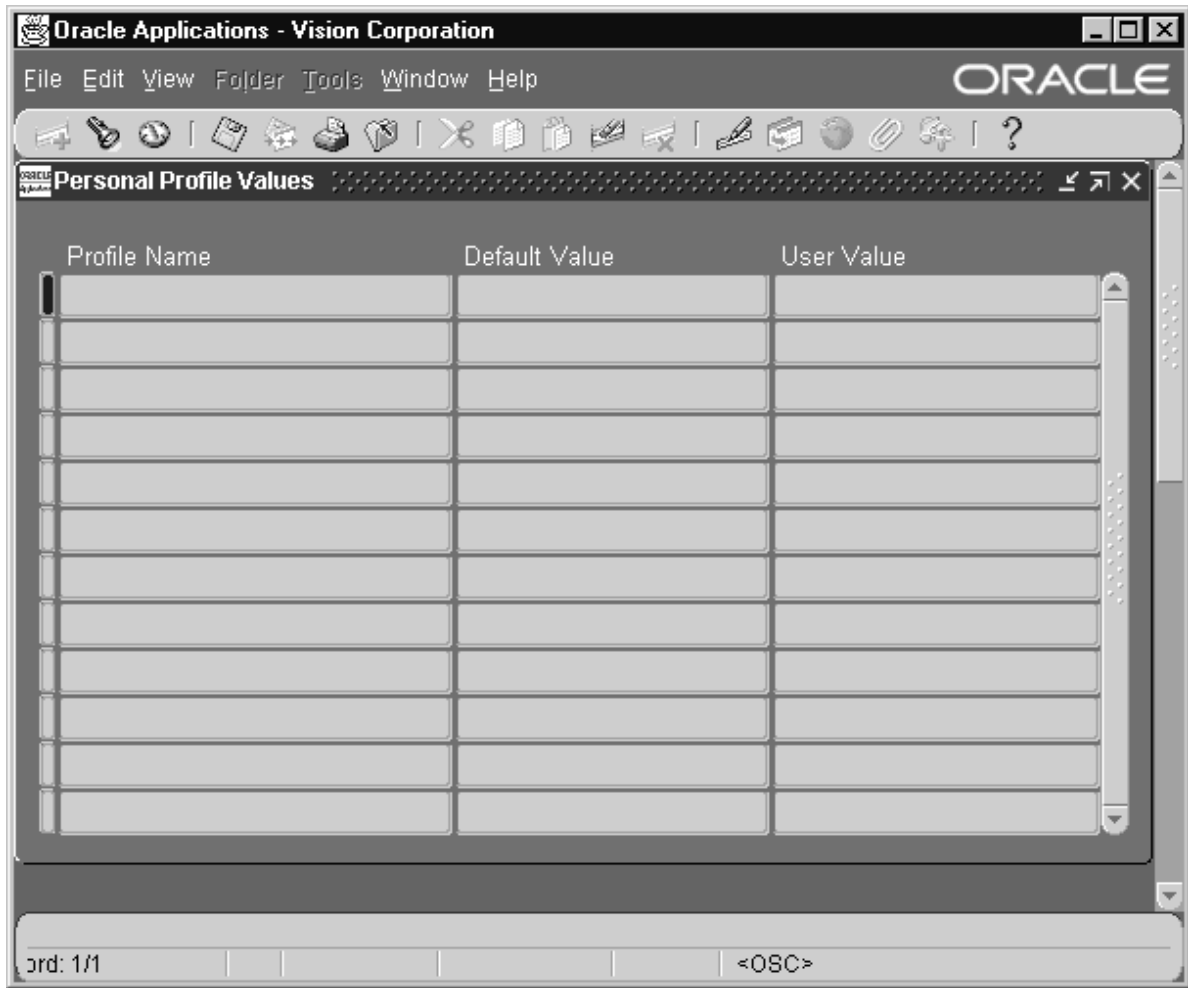
▶ **To change a profile option value:**

1. Navigate to the Profile Values window.

   This window displays all your user profile options and their values. If you wish to display only specific user profile options, first choose Enter from the View, Query by Example menu to enter search criteria in the Profile Name field, then choose Run from the View, Query by Example menu to run the search.

   The name of the user profile option appears in the Profile Name field while the Default Value field displays the run–time value of that option. The System Administrator sets default values for

many of the profile options. Some profile options may not display a default value.

2. Move your cursor to the User Value field of the option whose value you wish to modify.

3. Enter a new value for the option if it is updatable, or if the <List> lamp appears, choose a value from the list of available values.

   If the profile option is not updatable, the message "Item is protected against update," appears on the message line when you try to change the value. You can change most of your user profile options; values you enter in the User Value field override values preset by the System Administrator. A few profile options cannot be changed, but are displayed for informational purposes only.

   For most personal profile options, Oracle Applications automatically checks the value you enter to ensure it is valid.

☞ **Attention:** Number or date values are not validated, therefore, you must make sure that you enter a valid value for profile options that require a number or date; otherwise, your personal profile option may not work as you expect.

   Though you cannot delete a profile option from your personal profile, you can clear its value (if it is updatable) by highlighting the field and pressing [Backspace] or by choosing Clear, Field from the Edit menu. If you clear the value, the change does not take effect until you sign on again or change responsibilities.

4. Choose Save from the File menu to save your change.

   Your change will take effect when you either change responsibilities or log out and log back in.

Common User Profile Options

The following list of user profile options affects all Oracle Applications products. The alphabetical list includes only those options that can be viewed and/or changed by you at the User–level using the Personal Profile Values window. These user profile options affect your user interface and the behavior of Oracle Applications features, such as concurrent processing and flexfields.

Attachment File Upload Directory

Provides the directory path used to upload attachment files. Your System Administrator sets this profile option during the install process.

Only the System Administrator can update this profile option.

Concurrent:Attach URL

Setting this option to "Yes" causes a URL to be attached to request completion notifications. When a user submits a request, and specifies people to be notified in the Defining Completion Options region, everyone specified is sent a notification when the request completes. If this profile option is set to Yes, a URL is appended to the notification that enables them to view the request results on–line.

Only the System Administrator can update this profile option.

Concurrent:Hold Requests

You can automatically place your concurrent requests on hold when you submit them.

The default is "No." The concurrent managers run your requests according to the priority and start time specified for each.

Changing this value does not affect requests you have already submitted.

"Yes" means your concurrent requests and reports are automatically placed on hold. To take requests off hold, you:

- Navigate to the Requests window to select a request
- Click on the "Remove Hold" button

Concurrent:Multiple Time Zones

"Yes" sets the default value to "Sysdate–1" for the "Scheduled Start Date" used by request submissions. Sysdate–1 ensures that your request is scheduled immediately regardless of which time zone your client session is running in. You should use this profile option when the client's session is running in a different time zone than the concurrent manager's session.

Concurrent:Report Access Level

Determines access privileges to report output files and log files generated by a concurrent program. This profile option can be set by a System Administrator to User or Responsibility.

If your Concurrent:Report Access Level profile option is set to "User" you may:

- View the completed report output for your requests online.

- View the diagnostic log file for those requests online (the system administrator also has this privilege).

- Reprint your completed reports, if the Concurrent:Save Output profile option is set to "Yes."

- If you change responsibilities, then the reports and log files available for online review do not change.

If your Concurrent:Report Access Level profile option is set to "Responsibility," access to reports and diagnostic log files is based on your current responsibility.

- If you change responsibilities, then the reports and log files available for online review change to match your new responsibility. You can always see the output and log files from reports you personally submit, but you also see reports and log files submitted by any user from the current responsibility.

Only the System Administrator can update this profile option.

Concurrent:Report Copies

You can set the number of output copies that print for each concurrent request. The default is set to 1.

- Changing this value does not affect requests that you have already submitted.

Concurrent:Request Priority

This displays the default priority number for your concurrent requests. Only a system administrator can change your request priority.

Requests normally run according to start time, on a "first–submitted, first–run" basis. Priority overrides request start time. A higher priority request starts before an earlier request.

Priorities range from 1 (highest) to 99 (lowest). The standard default is 50.

Only the System Administrator can update this profile option.

Concurrent:Request Start Time

You can set the date and time that your requests are available to start running.

- If the start date and time is at or before the current date and time, requests are available to run immediately.

- If you want to start a request in the future, for example, at 3:45 pm on June 12, 1998, you enter 12–JUN–1998 15:45:00 as the profile option value.

- You must include both a date and a time.

- Changing this value does not affect requests that you have already submitted.

Concurrent:Save Output

The Concurrent: Save Output profile is used to determine whether the default behavior of certain concurrent programs should be to save or to delete their output files. This only affects concurrent programs that were created in the character mode versions of Oracle Applications and that have a null value for "Save Output."

- "Yes" saves request outputs.

- Some concurrent requests do not generate an output file.

- If your request output is saved, you can reprint a request. This is useful when requests complete with an Error status: for example, the request runs successfully but a printer malfunctions.

- Changing this value does not affect requests you have already submitted.

Concurrent:Sequential Requests

You can force your requests to run one at a time (sequentially) according to the requests' start dates and times, *or* allow them to run concurrently, when their programs are compatible.

- Concurrent programs are incompatible if simultaneously accessing the same database tables incorrectly affects the values each program retrieves.

- When concurrent programs are defined as incompatible with one another, they cannot run at the same time.

"Yes" prevents your requests from running concurrently. Requests run sequentially in the order they are submitted.

"No" means your requests *can* run concurrently when their concurrent programs are compatible.

Changing this value does not affect requests you have already submitted.

Concurrent: Show Requests Summary After Each Request Submission

Using this new profile option, you can choose to either have the Requests Summary displayed each time you submit a request, or retain the request submission screen.

The default is "Yes". "Yes" means the Requests Summary screen is displayed each time you submit a request.

If you choose "No", a decision window is opened asking you if you wish to submit another request. When you choose to submit another request you are returned to the submission window and the window is not cleared, allowing you to easily submit copies of the same request with minor changes.

Concurrent:Wait for Available TM

You can specify the maximum number of seconds that the client will wait for a given transaction manager (TM) to become available before moving on to try a different TM.

Concurrent:URL Lifetime

The numeric value you enter for this profile option determines the length of time in minutes a URL for a request ouput is maintained. After this time period the URL will be deleted from the system. This

profile option only affects URLs created for requests where the user has entered values in the notify field of the Submit Request or Submit Request Set windows.

☞ **Attention:** All request ouput URLs are deleted when the Purge Concurrent Requests and Manager... program is run even if the URL liftime has not expired.

Currency:Negative Format

You can use different formats to identify negative currency. The default identifier is a hyphen (–) preceding the currency amount, as in "–xxx". You can also select:

Angle brackets < >	< xxx >
Trailing hyphen –	xxx –
Parentheses ( )	(xxx)
Square Brackets [ ]	[xxx]

If you use the negative number formats of "(xxx)" or "[xxx]," in Oracle Applications Release 11 and after, your negative numbers appear as "<xxx>".

> **Note:** Currency:Negative Format only affects the display currency. Non–currency negative numbers appear with a preceding hyphen regardless of the option selected here.

Currency:Positive Format

You can use different formats to identify positive currency values. The default condition is no special identifier.

Currency:Thousands Separator

You can separate your currency amounts in thousands by placing a thousands separator. For example, one million appears as 1,000,000.

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.

The profile can be set to any valid country listed in the Maintain Countries and Territories form and can be set to a different value for each user.

Flexfields:AutoSkip

You can save keystrokes when entering data in your flexfields by automatically skipping to the next segment as soon as you enter a complete valid value into a segment.

- "Yes" means after entering a valid value in a segment, you automatically move to the next segment.

- "No" means after entering a valid value in a segment, you must press [Return] to go to the next segment.

  Note: You may still be required to use tab to leave some segments if the valid value for the segment does not have the same number of characters as the segment. For example, if a segment in the flexfield holds values up to 5 characters and a valid value for the segment is 4 characters, AutoSkip will not move you to the next segment.

Flexfields:BiDi Direction

This profile option controls the appearance of the flexfields window in Applications running in Semitic languages. Possible values are "Left To Right" and "Right To Left". If the profile option is not defined on a particular installation, the default value is "Right To Left", where the window appears in a normal, left to right fashion, and the text and layout are reversed to accommodate the right–to–left nature of the Semitic language environment.

Flexfields:LOV Warning Limit

Use Flexfields:LOV Warning Limit to improve efficiency when retrieving a list of values.

Sometimes, particularly when no reduction criteria has been specified, an LOV can take a very long time to run if there is a very significant amount of data in it. Set this profile option to the number of rows to be returned before the user is asked whether to continue retrieving the entire list.

Flexfields:Open Descr Window

You can control whether a descriptive flexfield window automatically opens when you navigate to a customized descriptive flexfield.

- "Yes" means that the descriptive flexfield window automatically opens when you navigate to a customized descriptive flexfield.

- "No" means that when you navigate to a customized descriptive flexfield, you must choose **Edit Field** from the Edit menu or use the List of Values to open the descriptive flexfield window.

  Note: This profile option does not apply to descriptive flexfields in folders.

Flexfields:Shorthand Entry

If shorthand flexfield entry is defined for your flexfield, you can use a shorthand alias to automatically fill in values for some or all of the segments in a flexfield.

Not Enabled   Shorthand Entry is not available for any flexfields for this user, regardless of whether shorthand aliases are defined.

New Entries Only   Shorthand Entry is available for entering new records in most foreign key forms. It is not available for combinations forms, updating existing records, or entering queries.

Query and New Entry   Shorthand Entry is available for entering new records or for entering queries. It is not available for updating existing records.

All Entries   Shorthand Entry is available for entering new records or updating old records. It is not available for entering queries.

Always   Shorthand Entry is available for inserting, updating, or querying flexfields for which shorthand aliases are defined.

Flexfields:Show Full Value

If an alias defines valid values for *all* of the segments in a flexfield, and Flexfields: Shorthand Entry is enabled, when you enter the alias the flexfield window does not appear.

"Yes" displays the full flexfield window with the cursor resting on the last segment.

Flexfields:Validate On Server

This profile option is set to "Yes" to enable server side, PL/SQL flexfields validation for Key Flexfields. This improves performance when using Key Flexfields over a wide area network by reducing the number of network round trips needed to validate the entered segment combinations.

FND: Indicator Colors

The default for this profile option is null, which means "Yes." When this profile option is set to Yes:

- Required fields are displayed in yellow.

- Queryable fields are displayed in a different color while in enter–query mode.

- Fields that cannot be entered (read–only) are rendered in dark gray.

Folders:Allow Customization

Your system administrator controls whether you can create or customize a folder definition layout in folder block.

- "Yes" means that you can create or customize a folder definition, that is, the entire Folder menu is enabled in the folder block.

- "No" means that you can only open an existing folder definition in a folder block, that is, only the Open option is enabled in the Folder menu.

Only the System Administrator can update this profile option.

Forms Keyboard Mapping File

Use this profile option to define the path of the Keyboard Mapping File.

The "Keyboard Help" window displays the keystrokes to perform standard Forms operations, such as "Next Block" and "Clear Record." This window can be viewed at anytime by pressing [Ctrl]+[K]. The keyboard mappings can be customized as desired by your System Administrator.

Forms Runtime Parameters

Use this profile to specify certain runtime parameters. The profile value must be entered in as `parameter=value` with each parameter–value pair separated by a single space. For example:

```
record=collect log=/tmp/frd.log debug_messages=yes
```

In order for the parameters updated in this profile option to take effect, you must exit and log back in to Oracle Applications.

Indicate Attachments

This profile option allows you to turn off indication of attachments when querying records (for performance reasons).

Only the System Administrator can update this profile option.

Java Color Scheme

If the Java Look and Feel profile option is set to Oracle, the Java Color Scheme can be specified as one of the following:

- Teal
- Titanium
- Red
- Khaki
- Blue
- Olive
- Purple

The Java Color Scheme profile setting has no effect if the Java Look and Feel is set to Generic.

Java Look and Feel

Your Oracle Applications Professional User Interface can be run with either the Oracle Look and Feel or the Generic Look and Feel. The Oracle Look and Feel consists of a new look and feel for each item, and a predefined set of color schemes. The Generic Look and Feel adheres to the native interface and color scheme of the current operating system.

To specify the look and feel set this profile to Generic or Oracle.

If the Oracle Look and Feel is used, the profile Java Color Scheme can be set.

MO: Operating Unit

Determines the Operating Unit the responsibility logs onto.

Printer

You can select the printer which prints your reports. If a printer cannot be selected, contact your system administrator. Printers must be registered with Oracle Applications.

Sequential Numbering

Sequential Numbering assigns numbers to documents created by forms in Oracle financial products. For example, when you are in a form that creates invoices, each invoice document can be numbered sequentially.

Sequential numbering provides a method of checking whether documents have been posted or lost. Not all forms within an application may be selected to support sequential numbering.

Sequential Numbering has the following profile option settings:

Always Used   You may not enter a document if no sequence exists for it.

Not Used   You may always enter a document.

Partially Used   You will be warned, but not prevented from entering a document, when no sequence exists.

Only system administrators can change this profile option.

Session ID

This runtime profile option contains the session ID number of the last database session that was created.

Sign–On:Notification

"Yes" displays a message at login that indicates:

- If any concurrent requests failed since your last session,

- How many times someone tried to log on to Oracle Applications with your username but an incorrect password, and

- When the default printer identified in your user profile is unregistered or not specified.

Viewer: Default Font Size

Using this new profile option, you can set the default font size used when you display report output in the Report Viewer.

The valid values for this option are 6, 8, 10, 12, and 14.

Viewer: Text

The Viewer: Text profile option has been enhanced to allow you to send report output directly to a browser window. Enter "Browser" in this profile option to take advantage of this new feature.

See: Profile Options in Oracle Applications Object Library: *Oracle Applications System Administrator's Guide*

Viewer: PostScript, PDF, and HTML

You can use the viewer of your choice when reviewing online the log and output files from your concurrent requests. In almost all cases, you need to specify different viewers for reviewing postscript (bitmap) files, PDF files, and HTML files.

To link the Oracle Applications concurrent processing facility with a postscript, PDF, or HTML, with the appropriate application installed on your computer, enter as the profile option value one of the following:

- Name of the application's executable file, when the file can be found in your computer's default path (for example, **write.exe**).

- Full path to the application's executable file, when the file is not found in your computer's default path (for example, **c:\windows\bin\write.exe**).

You should also enter any required parameters that may be necessary to invoke the application in a particular mode.

☞ **Attention:** In a client–server environment, PC clients can access log and output files on the servers by using either a Report Review Agent or a PC–NFS mount.

Only system administrators can change this profile option.

Oracle Applications Menus

This appendix provides you with a description of each menu item listed on the menus of the main menu bar.

Oracle Applications Pulldown Menu Bar

The Oracle Applications main menu bar includes the following menus:

- File
- Edit
- View
- Folder
- Tools; Special A and Special B
- Window
- Help

File Menu

File
New
Open
Save
Save and Proceed
Next Step
Export
Place on Navigator
Log on as a Different User...
Switch Responsibility...
Print...
Close Form
Exit Oracle Applications

The File menu lets you perform several actions in Oracle Applications:

New	Opens a new record in the active form.
Open	Opens the detail screen for the current selection.
Save	Saves any pending changes in the active form.
Save and Proceed	Saves any pending changes in the active form and advances to the next record.
Next Step	Updates the Process workflow in the Navigator by advancing to the next step in the process.
Export	Exports information in the active block to a tab–separated file which can be opened in a web browser or spreadsheet.
Place on Navigator	Creates an Icon in the Documents tab of the Navigator which can be used to recall the active form and its current record.
Log on as a Different User	Exits the application and displays the Oracle Applications Logon window. This feature is not available when you sign on using the Personal Homepage.
Switch Responsibility	Closes all active windows and displays the Responsibility window.

Print...	Prints your current window. An application may override this action to allow printing of one or more specific reports.	
Close Form	Closes all windows of the current form.	
Exit Oracle Applications	Quits Oracle Applications.	

Edit Menu

Edit
Undo Typing
Cut
Copy
Paste
Duplicate
Record Above
Field Above
Clear
Record
Field
Block
Form
Delete
Select All
Deselect All
Edit Field...
Preferences
Change Password...
Profiles
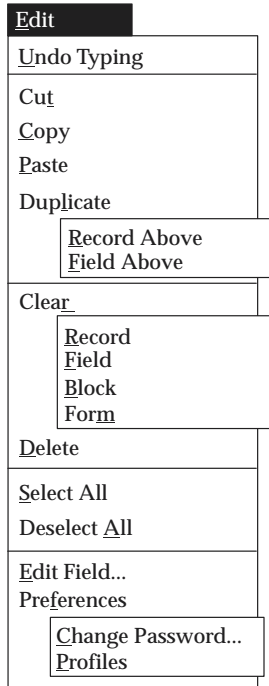
Use the Edit menu to edit your data in Oracle Applications:

Undo Typing	Returns the field to the value it had when it gained focus.
Cut	Cuts the current selection to the clipboard.
Copy	Copies the current selection to the clipboard.
Paste	Pastes the contents of the clipboard into the current field.
Duplicate: Record Above	Copies all values from the prior record to the current record.
Duplicate: Field Above	Copies the value of the current field from the prior row.
Clear Record	Erases the current record from the window.
Clear Field	Clears the data from the current field.
Clear Block	Erases all records from the current block.
Clear Form	Erases any pending changes from the current form.
Delete	Deletes the current record from the database.
Select All	Selects all records (for blocks with multi–select).
Deselect All	Deselects all selected records except for the current record (for blocks with multi–select).
Edit Field...	Displays the Editor window for the current field.
Preferences: Change Password	Displays the Change Password dialog box.
Preferences: Profiles	Displays the Profiles window.

View Menu

```
┌─────────────────────────┐
│ View                    │
├─────────────────────────┤
│ Show Navigator          │
│ Zoom                    │
├─────────────────────────┤
│ Find...                 │
│ Find All                │
│ Query by Example ┌──────────────────────────┐
├──────────────────│ Enter                    │
│ Record           │ Run                      │
│                  │ Cancel                   │
│                  ├──────────────────────────┤
│                  │ Show Last Criteria       │
│                  │ Count Matching Records   │
├──────────────────┴──────────────────────────┤
│ Record ┌────────────────┐
│        │ First          │
│        │ Last           │
├────────┴────────────────┘
│ Translations...         │
│ Attachments...          │
├─────────────────────────┤
│ Summary/Detail          │
├─────────────────────────┤
│ Requests                │
└─────────────────────────┘
```
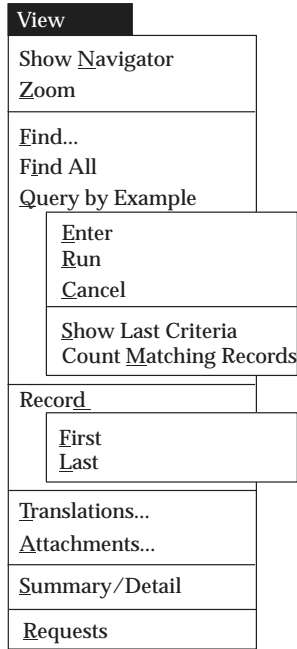
The View menu provides you with the following options:

Show Navigator	Displays the Navigator window.
Zoom	Invokes custom defined zooms.
Find...	Displays the Find window to retrieve records.
Find All	Retrieves all records.
Query by Example: Enter	Invokes "Enter Query" mode to enter search criteria for a query–by–example.
Query by Example: Run	Executes the query–by–example.
Query by Example: Cancel	Cancels the query–by–example by exiting from 'Enter Query' mode.
Query by Example: Show Last Criteria	Recovers the search criteria used in the previous query–by–example.
Query by Example: Count Matching Records	Counts the number of records that would be retrieved if you ran the current query–by–example.
Record First	Moves the cursor to the first record.
Record Last	Moves the cursor to the last record.
Translations...	Displays the Translations window.
Attachments...	Displays the Attachments window.
Summary/Detail	Switches between the summary and detail views of a combination block.
Requests	Displays the Request window.

See Also

Searching for Information: page 3 – 22

Folder Menu

Folder
New...
Open...
Save
Save As...
Delete...
Show Field...
Hide Field
Move Right
Move Left
Move Up
Move Down
Widen Field
Shrink Field
Change Prompt...
Autosize All...
Sort Data...
View Query...
Reset Query
Folder Tools

The Folder menu lets you customize the presentation of data in a folder:

New...	Creates a new folder definition.
Open...	Opens an existing folder definition.
Save	Saves changes to the current folder definition.
Save As...	Saves current folder definition to a new name.
Delete...	Deletes an existing folder definition.
Show Field...	Displays a field that is currently hidden.
Hide Field	Hides the current field.
Move Right	Moves the current field to the right.
Move Left	Moves the current field to the left.
Move Up	Moves the current field up.
Move Down	Moves the current field down.
Widen Field	Increases the width of the current field.
Shrink Field	Decreases the width of the current field.
Change Prompt...	Changes the prompt for the current field.
Autosize All...	Adjusts all field widths to completely show their data.
Sort Data...	Specifies sort order for the first three fields by ascending, descending and no ordering.
View Query...	Displays the query criteria for the current folder definition.
Reset Query	Erases the current query criteria.
Folder Tools	Displays the folder tool palette.

See Also

Customizing the Presentation of Data in a Folder: page 4 – 2

Tools and Special Menus

Tools
Expand
Collapse
Expand Branch
Expand All
Collapse All
Add to List
Remove from List
❏ Close Other Forms

Special
special1
special2
special3
special4
...

The Tools menu displayed on the left represents the pulldown options available when the Navigator window is active.

Special menus A and B (default set to Reports and Actions) used in addition to the Tools menu are user configurable to allow the addition of application–specific commands. These menus can be removed if they are not needed by the application.

The menus may contain up to fifteen product–specific entries. Examples of product–specific entries may include a list of commonly used Inquiry windows in the application, or a commonly used window that a user may want to display for a quick reference.

Window Menu

Window
Cascade
Tile Horizontally
Tile Vertically
○ 1 (Open Window)
○ 2 (Open Window)
○ 3 (Open Window)

The Window menu displays the names of all open application windows and window placement options.

Cascade	Displays any open windows in a "cascaded" or stair–stepped fashion.
Tile Horizontally	Displays any open windows in a horizontally "tiled" (non–overlapping) fashion.
Tile Vertically	Displays any open windows in a vertically "tiled" (non–overlapping) fashion.
1 (Open Window)	Displays a list of open windows titles in the order in which they are stacked.

Help Menu

Use the Help menu to get additional information about Oracle Applications:

Window Help	Displays help for the current window.
Oracle Applications Library	Displays a window that lists all available Oracle Applications help text.
Keyboard Help...	Displays the current key mappings of specific functions and menu options.
Diagnostics	All of the entries in these menus are used for debugging. You may be asked to use some of these functions if you need to contact Oracle Support. You may not have access to all of these functions. See your System Administrator for additional information.

Display Database Error	Displays the last database error.
Examine	Displays the underlying Oracle Forms block and item corresponding to a field on the form.
Logging	Launches the generic logging system pages.
Test Web Agent	Performs a check of the Web Agent to determine if it is configured properly.
Trace	Turns SQL*Trace on and off with different parameters. SQL*Trace provides performance information on individual SQL statements.
Debug	Turns on the Oracle Forms Debugger, provided the form you are currently in was started in debug mode.
Properties	The Properties submenu provides diagnostic

		information for Items and Folders.
	Item	Displays the values for properties of the current item.
	Folder	Writes diagnostic information about the current folder to a file in the temporary directory.
	Custom Code	The Custom Code submenu is an option group, allowing you to change the mode of the custom library.
	Normal	The custom library is used. This is the default.
	Off	Turns the custom library off, disabling Zooms and any other custom code.
	Core Code Only	When this option is set, APPCORE will bypass branching into the custom libraries and bypass branching into the vertical libraries.
	Show Custom **E**vents	This option will display messages at runtime to indicate which events are passed to the custom library.
Record History		Displays information about the current record.
About **O**racle Applications...		Displays information about the current application, including version and environment information.

Menu Mapping from Release 11 to 11*i*

The following tables cross–refererence the Release 11 menu functions to the new Release 11*i* menu functions.

The Action Menu

Release 11	Release11i
Action > Navigate To...	View > Show Navigator
Action > Zoom	View > Zoom
Action > Save	File > Save
Action > Save and Proceed	File > Save and Proceed
Action > Print...	File > Print...
Action > Export...	File > Export
Action > Refresh	Not Available
Action > Close Window	(Other) > Use native controls
Action > Close Form	File > Close Form
Action > Exit Oracle Applications	File > Exit Oracle Applications

The Edit Menu

Release 11	Release11i
Edit > Cut	Edit > Cut
Edit > Copy	Edit > Copy
Edit > Paste	Edit > Paste
Edit > Clear Field	Edit > Clear > Field
Edit > Duplicate Field Above	Edit > Duplicate > Field Above
Edit > List of Values...	(Other) > Use LOV button next to field
Edit > Edit Field...	Edit > Edit Field
Edit > New Record	File > New
Edit > Delete Record	Edit > Delete
Edit > Clear Record	Edit > Clear > Record
Edit > Duplicate Record Above	Edit > Duplicate > Record Above
Edit > Translations...	View > Translations...
Edit > Attachments...	View > Attachments...
Edit > Select All	Edit > Select All

Release 11	Release11i
Edit > Deselect All	Edit > Deselect All
Edit > Clear Block	Edit > Clear > Block
Edit > Clear Form	Edit > Clear > Form

The Go Menu

Release 11	Release11i
Go > Next Field	(Other) > Tab
Go > Previous Field	(Other) > Shift>Tab
Go > Next Record	(Other) > Down Arrow on keyboard
Go > Previous Record	(Other) > Up Arrow on keyboard
Go > First Record	View > Record > First
Go > Last Record	View > Record > Last
Go > Next Block	(Other) > Use Cntrl>K for keyboard mapping
Go > Previous Block	(Other) > Use Cntrl>K for keyboard mapping
Go > Summary/Detail	File > Open

The Folder Menu

Release 11	Release11i
Folder	
Folder > Unchanged	Folder > Unchanged

The Query Menu

Release 11	Release11i
Query > Find...	View > Find...
Query > Find All	View > Find All
Query > Enter	View > Query by Example > Enter
Query > Run	View > Query by Example > Run

Release 11	Release11i
Query > Cancel	View > Query by Example > Cancel
Query > Show Last Criteria	View > Query by Example > Show Last Criteria
Query > Count Matching Records	View > Query by Example > Count Matching Records
Query > Get More Records	(Other) > Use the slide control on the scroll bar

The Special Menu

Release 11	Release11i
Special > first special	Tools > first tools

The Window Menu

Release 11	Release11i
Window > Cascade	Window > Cascade
Window > Tile	Window > Tile
Window > Arrange Icons	Not Available
Window > first window	Window > first window

The Help Menu

Release 11	Release11i
Help > Window Help	Help > Window Help
Help > Oracle Applications Library	Help > Oracle Applications Library
Help > Keyboard Help...	Help > Keyboard Help...
Help > Display Database Error...	Help > Diagnostics > Display Database Error...
Help > Tools	Help > Diagnostics
Help > View My Requests	View > Requests
Help > About This Record...	Help > Record History
Help > About Oracle Applications	Help > About Oracle Applications

New for Release 11i

Release 11*i* provides several new menu functions. The following table lists these menu items and their actions:

Menu Item	Action
Edit > Undo Typing	Undoes any typing done in a field before the field is exited and returns the field to the most recent value.
Edit > Preferences > Change Password	Displays the Change Password dialog box.
Edit > Preferences > Profiles	Displays the Profiles window.
File > Next Step	Saves and pending changes in the active form and updates the Process workflow in the Navigator.
File > Place on Navigator	Creates and icon in the Documents Tab region of the Navigator which can be used to recall the active form and its current record.
File > Change Log On	Exits the applicaitons and displays the Oracle Applications Logon window.
File > Switch Responsibility	Displays the Responsibility window.

Personal Homepage in Oracle Applications

This appendix describes features of the Personal Homepage including:

- Using the Personal Homepage in Oracle Applications
- Customizing the Personal Homepage

Personal Homepage in Oracle Applications

The Personal Homepage provides a customizable point of entry into Oracle Applications.

Welcome Toolbar

The Welcome toolbar contains icons for the following functionality:

The **Help** icon opens the online help window

The **Create and Modify Pages** icon opens the Maintain Pages window where you can create and modify tab pages within the Personal Homepage

The **Exit** icon returns you to the login screen

Tab Pages

The Personal Homepage consists of one or more tab pages. Each tab page is laid out in regions. The content of each region consists of "plugs" (for example, Favorites, Navigate, and Ask Oracle).

The default tab page is called "Main Menu" and it cannot be deleted.

To add, delete, or edit the tab pages, click on the "Create and Modify Pages" icon on the Welcome toolbar.

Some plugs allow customization. These will display a Customize icon on the title bar of the plug. Click on the icon to view and select options for the plug.

Navigation and Favorites

The Navigate plug provides 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.

The Favorites plug allows you to place links to your favorite web destinations in a single region of the tab page. You can place your favorite reports, news services, corporate intranet sites, or other systems you may need in this region.

Worklist

The Worklist includes notifications that are of interest to you, based on criteria you specify by customizing this feature. Each message is time and date stamped. You can sort your notifications by subject, due date, sent date, type, or priority.

Ask Oracle

Using **Ask Oracle** you can search for reports of interest to you, since an important decision–making dynamic is to consider related subjects while reviewing specific facts. Enter keywords or questions in the Ask Oracle text box and click on the **Ask Oracle** button. A list of reports and business questions that meet your criteria will be displayed.

The Oracle Business Intelligence System presents information from a complete enterprise–wide perspective on an up–to–date basis without staff spending time filtering the data and preparing one–time reports.

Business Views Catalog

Business Views Catalog allows you to search for business views of interest to you. Enter keywords in the Business Views Catalog text box and click on the Search Views button. A list of business folders and business areas with descriptions that meet your criteria will be displayed.

Performance Measures

The Performance Measure feature allows you to view BIS measurements of interest to you. The Target value and the Actual value are displayed for each measure.

See Also

Customizing the Personal Homepage: page B – 5

Customizing the Personal Homepage

You can configure your homepage by creating regions and specifying the content of each region.

Use the icons provided to modify the content, location, and size of each region.

Maintaining Tab Pages

To add, delete, or edit the tab pages, click on the "Create and Modify Pages" icon on the Welcome toolbar.

You then see the Maintain Pages window. In this window you can perform the following functions:

▶ **To create a new page:**

■ Use the **New** button and enter in a new page name in the proper field.

▶ **To edit an existing page:**

■ Select a page from the list, and click the **Edit** button. This button opens up the Customize page window. See Customizing a Tab Page: page B – 5.

▶ **To rename a page:**

■ Select a page from the list, and click the **Rename** button.

▶ **To delete a page:**

■ Select a page from the list, and click the **Delete** button.

▶ **To copy a page as a template for a new page:**

■ Use the **Copy Template** button. You will then be prompted to select which page you wish to copy and to enter a name for the new page.

▶ **To change and save the ordering of your pages:**

■ By selecting a page name in the list and using the up and down arrows, you can change the order of the pages. The pages appear in this order on your Personal Homepage.

■ To save your changes, click the **Save Order** button.

Customizing a Tab Page

To customize a tab page, click on the Modify Page Content and Appearance icon in the corner of the tab. This will open the Customize Page window.

The following icons will be displayed for each region on the tab page:

Click the **Edit Content** icon to open up a window listing available plugs. You can add one or more of these plugs to a region.

Click the **Edit Appearance** icon to change the width of the region and specify whether to show a border around it.

Click the **Add Row** icon to add a region as a new row beneath the selected region. You can delete a region by using the Delete icon.

Click the **Add Column** icon to add a region as a new column beside the selected region. You can delete a region by using the Delete icon.

Click the **Delete** icon to delete a plug or a region.

Click the **Rename** icon to rename the instance of the plug within a region.

Preferences

There are several choices you can make about how you want to view information in Oracle Applications. These choices include languages, date formats, and number formats.

To access your preferences, choose the Preferences link. For information on your preference options, see Preferences: page 1 – 12.

Extensible Links Forms

Extensible links allow the user to customize each Related Information section within each report with the information they choose. When using a particular report, the user can navigate to other related reports, workbooks, or URL links, which can provide different perspectives.

The extensible links design is intended to externally model and configure a web of links metaphor in Oracle Applications UI. The extensible links architecture uses a generic repository–based approach to handle this. The extensible links component has a set of tables that stores information about the various reports and their related reports. Parameter values can be stored in these tables as well.

Parameter Passing

Parameter Passing allows the user to enter specific parameters for a particular report. Those parameters are then stored in a runtime repository, and can be passed or saved to another report or workbook. Reports pass parameters between each other. A drill–down report receives all parameters that are applicable to its parameter and dimension level. For example, a report could receive the value USA and know that this corresponds to the Geography dimension and country level. The View–By value is also passed for use by the child report, when applicable.

When a child (drill–down) report does not receive enough values to run, it displays the parameter form prefilled with any provided values. If the parent report provides values that the child report does not use, the values are ignored. If the report needs more parameters for the user to determine in which mode the report is running, the report may be set not to run automatically.

At any point, the user should be able to change the set of parameters being used. This change will be reflected in any downstream reports.

User–Defined Links to BIS Reports

BIS Reports include links to related reports to which the user can navigate. The user can define these links and configure them dynamically without rewriting the reports.

User–Defined Links to Discoverer Workbooks

Users can define and configure links to Discoverer workbooks from a report.

Indicators Region

The Indicators region is the management navigation area for your business information. From here you can monitor items of ongoing interest and personal accountability. From this area, you can select from the full collection of enterprise–wide KPIs.

Authorized users define targets that are stored in the Performance Management Framework. They represent current performance objectives for the overall enterprise or a specific business unit. If the performance deviates from the acceptable defined targets, then notifications are sent to the manager.

Monitoring PMF Actuals on the Personal Home Page

To monitor Actuals (that is, a performance measure's value):

1. Click on "Customize" on the Performance Monitor region.

2. Click on "Available Target Levels" from the "Target Level" screen that you want to monitor.

3. Click on "Continue."

4. Choose all dimension level values (from the list of values).

5. Choose the appropriate "Business Plan."

6. Input your personalized label in the "Display Label Field."

7. Click on the "Edit" button if corrections need to be made (via pop–up windows).

8. Click on "Done" when finished.

   This will return you to the Personal Homepage where you can see your newly customized PM region.

9. Follow the same steps as above to customize a label on the Performance Measure region.

Trends Region

You can view trends of particular interest to your business. You can
drill down into the detail of each graph simply by clicking on it. The
graph will bring you to the corresponding report. You can personalize
your homepage to include as many graphs as you like.

Accessibility

This appendix discusses the features available in Oracle
Applications to enhance user accessibility.

Oracle Applications Accessibility Features

General Features

The Look and Feel of the User Interface

The Oracle Applications Professional User Interface can be run with either the Oracle Look and Feel or the Generic Look and Feel. The Oracle Look and Feel consists of a new look and feel for each item, and a predefined set of color schemes. The Generic Look and Feel adheres to the native interface and color scheme of the current operating system. The choice of look and feel has an impact on accessibility features. In general, the Oracle Look and Feel is the more accessible of the modes. Only low–vision users should find it necessary to use the generic look and feel.

To specify look and feel, set the profile option "Java Look and Feel" to either "generic" or "oracle". If the oracle look and feel is used, the profile option "Java Color Scheme" can be specified as follows: blue, khaki, olive, purple, red, teal, or titanium. The Java Color Scheme profile option has no effect if Java Look and Feel is set to generic.

Navigating the Interface

Oracle Applications offers a feature that can render the current screen in a compressed, text–only fashion. By invoking the "KEY–F9" function, all of the prompts and values of items in the current window (but just the current row for multi–row blocks) are displayed within a popup window in a text–only format. Each row can be spoken by a screen reader. Included in this list are the values of display items or disabled items that otherwise would not be easily discernible with a screen reader because they are not keyboard–navigable.

Similarly, the "KEY–F8" function shows a list of all buttons within the window and their access keys, which otherwise would not be obtainable if they were not navigable.

> **Note:** The KEY–F8 and KEY–F9 functions may not be mapped to the corresponding function keys in your system. Use the Keys window (Help > Keyboard Help... or Ctrl+k) to view the current mappings for your system.

Specific Accessibility Techniques

Techniques for Low–Vision Users

Low–vision users may find it necessary to control the overall colors of the application, either to increase or decrease the contrast. They can set the desired colors using the operating system's provided schemes, then specify "generic" in the Java Look and Feel profile option so that Oracle Applications will use these colors.

Oracle Applications by default renders required fields in yellow, queryable fields in a different color while in enter–query mode, and fields that cannot be updated (read–only fields) in gray. To turn off these features when running Oracle Applications Professional User Interface, set profile FND: Indicator Colors to "No".

Techniques for Physically Disabled Users

Tabs in Oracle Applications can be switched from the keyboard by using the "List Tab Pages" function (typically F2).

Oracle Applications includes a feature that renders an iconic button next to each field that has an LOV. The LOV can also be invoked from the keyboard by pressing the "List of Values" access key (typically Ctrl+l).

The "Keys" window displays the keystrokes to achieve normal Applications operations, such as "Next Block" and "Clear Record." This window can be viewed any time by pressing Ctrl+k.

Oracle Applications provides the profile option "Forms Keyboard Mapping File" to allow a customized keyboard mapping file to be used through the Professional User Interface. The keyboard mappings can be customized as follows:

1. Locate the Oracle Forms resource file on the middle tier, typically called `fmrweb.res` (This step will typically be performed by a System Administrator)

2. Copy the file, renaming it as appropriate, and locate it in the same directory as the original.

3. Open the new file in any text editor and make the desired keystroke mapping changes. Comments at the top of the file explain how the mappings are performed.

4. To run this new mapping file, specify the complete path in addition to the filename in the profile "Forms Keyboard Mapping File."

Glossary

Accounting Flexfield The code you use to identify a general ledger account in an Oracle Financials application. Each Accounting Flexfield value corresponds to a summary or rollup account within your chart of accounts.

Action Set A sequence of alert actions that are enabled for a particular alert. You can assign a sequence number to each action you include in an action set to specify the order in which the actions are performed.

Alert A mechanism that checks your database for a specific exception condition. An alert is characterized by the *SQL SELECT statement* it contains. A SQL SELECT statement tells your application what database exception to identify as well as what output to produce for that exception.

Alert Action An action you want your alert to perform. An alert action can depend on the output from the alert. An action can include sending an electronic mail message to a mail ID, running an Oracle Applications program, running a program or script from your operating system, or running a SQL script to modify information in your database. You can have more than one action for an alert, and an action can incorporate the output of the alert.

alternative region An alternative region is one of a collection of regions that occupy the same space in a window where only one region can be displayed at any time. You identify an alternative region by a poplist icon that displays the region title, which sits on top of a horizontal line that spans the region.

AutoReduction An Oracle Applications feature in the list window that allows you to shorten a list so that you must scan only a subset of values before choosing a final value. Just as AutoReduction incrementally reduces a list of values as you enter additional character(s), pressing [Backspace] incrementally expands a list.

AutoSelection A feature in the list window that allows you to choose a valid value from the list with a single keystroke. When you display the list window, you can type the first character of the choice you want in the window. If only one choice begins with the character you enter, AutoSelection selects the choice, closes the list window, and enters the value in the appropriate field.

AutoSkip A feature specific to flexfields where Oracle Applications automatically moves your cursor to the next segment as soon as you enter a valid value into a current flexfield segment. You can turn this feature on or off with the user profile option Flexfields:AutoSkip.

balancing segment An Accounting Flexfield segment that you define so that Oracle General Ledger automatically balances all journal entries for each value of this segment. For example, if your company segment is a balancing segment, Oracle General Ledger ensures that, within every journal entry, the total debits to company 01 equal the total credits to company 01.

block Every Oracle Applications window (except root and modal windows) consists of one or more blocks. A block contains information pertaining to a specific business entity. Generally, the first or only block in a window assumes the name of the window. Otherwise, a block name appears across the top of the block with a horizontal line marking the beginning of the block.

business entity A person, place, or thing that is tracked by your business. For example, a business entity can be an account, a customer, or a part.

button 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.

check box You can indicate an on/off or yes/no state for a value by checking or unchecking its check box. One or more check boxes can be checked since each check box is independent of other check boxes.

child request A concurrent request submitted by another concurrent request (a parent request.) For example, each of the reports and/or programs in a report set are child requests of that report set.

combination block A combination block displays the fields of a record in both multi–record (summary) and single–record (detail) formats. Each format appears in its own separate window that you can easily navigate between.

combination of segment values A combination of segment values uniquely describes the information stored in a field made up of segments. A different combination of segment values results when you change the value of one or more segments. When you alter the combination of segment values, you alter the description of the information stored in the field.

combination query See *Existing Combinations.*

concurrent manager A unique facility that manages many time–consuming, non–interactive tasks within Oracle Applications for you, so you do not have to wait for their completion. When you submit a request in Oracle Applications that does not require your interaction, such as releasing shipments or running a report, the Concurrent Manager does the work for you, enabling you to complete multiple tasks simultaneously.

concurrent process A non–interactive task that you request Oracle Applications to complete. Each time you submit a non–interactive task, you create a new concurrent process. A concurrent process runs simultaneously with other concurrent processes (and other interactive activities on your computer) to help you complete multiple tasks at once.

concurrent queue A list of concurrent requests awaiting completion by a concurrent manager. Each concurrent manager has a queue of requests waiting to be run. If your system administrator sets up your Oracle Application to have simultaneous queuing, your request can wait to run in more than one queue.

concurrent request A request to Oracle Applications to complete a non–interactive task for you. You issue a request whenever you submit a non–interactive task, such as releasing a shipment, posting a journal entry, or running a report. Once you submit a request, Oracle Applications automatically takes over for you, completing your request without further involvement from you or interruption of your work.

current record indicator Multi–record blocks often display a current record indicator to the left of each record. A current record indicator is a one character field that when filled in, identifies a record as being currently selected.

descriptive flexfield A field that your organization can extend to capture extra information not otherwise tracked by Oracle Applications. A descriptive flexfield appears in your window as a single character, unnamed field. Your organization can customize this field to capture additional information unique to your business.

Detail Action An alert action that represents one exception found in the database.

dynamic insertion A feature specific to key flexfields that allows you to enter and define new combinations of segment values directly into a flexfield pop–up window. The new combination must satisfy any cross–validation rules, before your flexfield accepts the new combination. Your organization can decide if a key flexfield supports dynamic insertion. If a flexfield does not support dynamic insertion, you can only enter new combinations of segment values using a combinations form (a form specifically used for creating and maintaining code combinations).

Existing Combinations A feature specific to key flexfields in data entry mode that allows you to enter query criteria in the flexfield to bring up a list of matching predefined combinations of segment values to select from.

field A position on a window that you use to enter, view, update, or delete information. A field prompt describes each field by telling you what kind of information appears in the field, or alternatively, what kind of information you should enter in the field.

flexfield An Oracle Applications field made up of segments. Each segment has an assigned name and a set of valid values. Oracle Applications uses flexfields to capture information about your organization. There are two types of flexfields: key flexfields and descriptive flexfields.

folder A flexible entry and display window in which you can choose the fields you want to see and where each appears in the window.

form A logical collection of fields, regions, and blocks that appear on a single screen. Oracle Applications forms look just like the paper forms you use to run your business. All you need to do to enter data is type onto the form. See *window.*

function security An Oracle Applications feature that lets you control user access to certain functions and windows. By default, access to functionality is *not* restricted; your system administrator customizes each responsibility at your site by including or excluding functions and menus in the Responsibilities window.

key flexfield An intelligent key that uniquely identifies an application entity. Each key flexfield segment has a name you assign, and a set of valid values you specify. Each value has a meaning you also specify. You use this Oracle Applications feature to build custom fields used for entering and displaying information relating to your business. The Accounting Flexfield in your Oracle General Ledger application is an example of a key flexfield used to uniquely identify a general ledger account.

lamp A single word message that appears on the message line to indicate whether a function such as <Insert> or <List> is available for the current field.

listing An organized display of Oracle Applications information, similar to a report, but usually showing setup data as opposed to transaction data.

lookup code An internal name of a value defined in a lookup type.

lookup type A predefined list of values. Each value in a lookup type has an internal and a display name.

master–detail relationship A master–detail relationship is an association between two blocks—a master block and its detail block. When two blocks are linked by a master–detail relationship, the detail block displays only those records that are associated with the current (master) record in the master block, and querying between the two blocks is always coordinated. Master and detail blocks can often appear in the same window or they can each appear in separate windows.

message line A line on the bottom of a window that displays helpful hints or warning messages when you encounter an error.

multi–org See *multiple organizations.*

multiple organizations The ability to define multiple organizations and the relationships among them within a single installation of Oracle Applications. These organizations can be sets of books, business groups, legal entities, operating units, or inventory organizations.

Multiple Reporting Currencies An Oracle General Ledger feature that allows you to report in your functional currency and in one or more foreign currencies.

No Exception Action An alert action that represents no exceptions found in the database.

option group An option group is a set of option buttons. You can choose only one option button in an option group at a time, and the option group takes on that button's value after you choose it. An option button or option group is also referred to as a radio button or radio group, respectively.

parent request A concurrent request that submits other concurrent requests (child requests). For example, a report set is a parent request that submits reports and/or programs (child requests).

Periodic Alert An alert that periodically reports key information according to a schedule you define. Rather than notify you of immediate exceptions in the database like an event alert, a periodic alert scans for specific database information specified by its SQL SELECT statement at scheduled intervals.

pop–up window An additional window that appears on an Oracle Applications form when your cursor enters a particular field.

poplist A poplist lets you choose a single value from a predefined list. To choose a value, press your left mouse button while on the poplist icon to display the list of choices, then drag your mouse through the list to the desired value. Release your mouse button to choose the value you highlight and display it in the poplist field. A poplist is also sometimes known as a list.

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

record 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.

region A collection of logically–related fields set apart from other fields by a dashed line that spans a block. Regions help to organize a block so that it is easier to understand.

report An organized display of Oracle Applications information. A report can be viewed online or sent to a printer. The content of information in a report can range from a summary to a complete listing of values.

report security group A feature that helps your system administrator control your access to reports and programs. Your system administrator defines a report security group which consists of a group of reports and/or programs and assigns a report security group to each responsibility that has access to run reports using Standard Report Submission. When you submit reports using Standard Report Submission, you can only choose from those reports and programs in the report security group assigned to your responsibility.

report set A group of reports that you submit at the same time to run as one transaction. A report set allows you to submit the same set of reports regularly without having to specify each report individually. For example, you can define a report set that prints all of your regular month–end management reports.

responsibility A level of authority in an application. Each responsibility lets you access a specific set of Oracle Applications windows, menus, reports, and data to fulfill your role in an organization. Several users can share the same responsibility, and a single user can have multiple responsibilities.

root window The root window displays the main menu bar and tool bar for every session of Oracle Applications. In Microsoft Windows, the root window is titled "Oracle Applications" and contains all the Oracle Applications windows you run. In the Motif environment, the root window is titled "Toolbar" because it displays just the toolbar and main menu bar.

row One occurrence of the information displayed in the fields of a block. A block may show only one row of information at a time, or it may display several rows of information at once, depending on its layout. The term "row" is synonymous with the term "record".

scrollable region A region whose contents are not entirely visible in a window. A scrollable region contains a horizontal or vertical scroll bar so that you can scroll horizontally or vertically to view additional fields hidden in the region.

segment A single sub–field within a flexfield. You define the structure and meaning of individual segments when customizing a flexfield.

shorthand flexfield entry A quick way to enter key flexfield data using shorthand aliases (names) that represent valid flexfield combinations or patterns of valid segment values. Your organization can specify flexfields that will use shorthand flexfield entry and define shorthand aliases for these flexfields that represent complete or partial sets of key flexfield segment values.

shorthand window A single–segment customizable field that appears in a pop–up window when you enter a key flexfield. The shorthand flexfield pop–up window only appears if you enable shorthand entry for that particular key flexfield.

sign–on An Oracle Applications username and password that allows you to gain access to Oracle Applications. Each sign–on is assigned one or more responsibilities.

Standard Request Submission A standard interface in Oracle Applications in which you run and monitor your application's reports and other processes.

status line A status line appearing below the message line of a root window that displays status information about the current window or field. A status line can contain the following: ^ or **v** symbols indicate previous records before or additional records following the current record in the current block; **Enter Query** indicates that the current block is in Enter Query mode, so you can specify search criteria for a query; **Count** indicates how many records were retrieved or displayed by a query (this number increases with each new record you access but does not decrease when you return to a prior record); the <**Insert**> indicator or *lamp* informs you that the current window is in insert character mode; and the <**List**> lamp appears when a list of values is available for the current field.

structure A structure is a specific combination of segments for a key flexfield. If you add or remove segments, or rearrange the order of segments in a key flexfield, you get a different structure.

Summary Action An alert action that represents multiple exceptions found in the database.

Summary Threshold The number of exceptions Oracle Alert can find before it changes an alert action from a detail action to a summary action.

toolbar The toolbar is a collection of iconic buttons that each perform 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. You can display a hint for an enabled toolbar button on the message line by holding your mouse steadily over the button. The toolbar generally appears below the main menu bar in the root window.

user profile A set of changeable options that affect the way your applications run. You can change the value of a user profile option at any time.

window 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.

window title A window title at the top of each window indicates the name of the window, and occasionally, context information pertinent to the content of the window. The context information, contained in parenthesis, can include the organization, set of books, or business group that the window contents is associated with.

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