Oracle Utilities Application Framework

Version 25.4

Business Process Guide

Revision 18.0

G59564-01

October 2026

ORACLE

Notices

Oracle Utilities Application Framework Version 25.4 Business Process Guide

G59564-01

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Preface

About this Document

This document explains how to get acquainted with the user interface. It explains the different types of pages or portals that you may come across in the application. It describes how to set the user preferences and how to create, manage, assign, and complete a To Do in the application. It also explains how to submit reports and view historic reports in the application.

Intended Audience

This document is intended for the following audience:

- End-users
- System Administrators
- Consulting Team
- Implementation Team
- Development Team

Organization of the Document

The information in this document is organized into the following chapters:

Chapter Number	Chapter Name	Chapter Description
Chapter 1	User Interface Standard Features	Explains how to get acquainted with the user interface. It explains the different types of pages or portals that you may come across in the application. It describes how to set the user preferences and initiate scripts in various ways from the user interface.
Chapter 2	To Do Processing	Explains the different concepts related to To Do. It explains how to create, manage, assign, and complete a To Do in the application.
Chapter 3	Reports	Explains how to submit the reports through a third party reporting tool, such as BI Publisher, which is integrated with the application.

Related Documents

You can refer to the following documents for more information:

Document Name	Description
Oracle Utilities Application Framework Version 25.4 Administrative Guide	Explains the general, security, user, designing, developing, and scripting options available in Oracle Utilities Application Framework (OUAF). It describes the user interface, database, configuration, and reporting tools available in OUAF. In addition, it provides information on how to configure incoming and outgoing messages and how to integrate

Document Name	Description
	Lightweight Directory Access Protocol (LDAP), Oracle Identity Manager (OIM), and Batch Scheduler with Oracle Revenue Management and Billing (ORMB).

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Chapter 1

User Interface Standard Features

Topics:

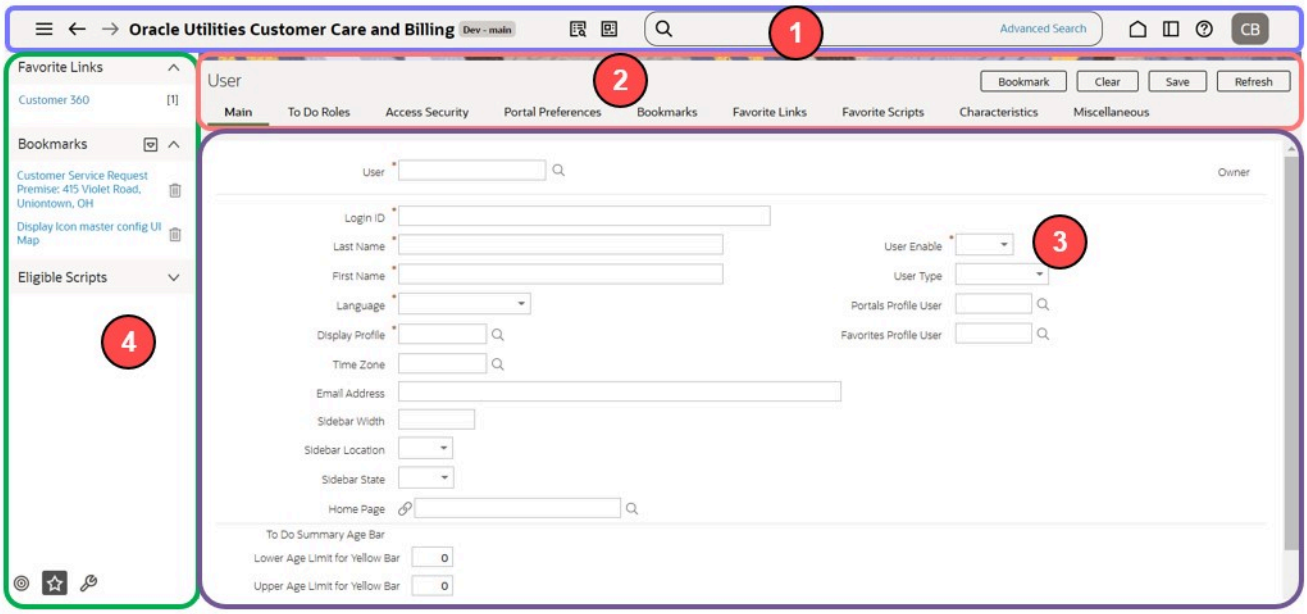
- Page Components
- Portal Pages
- Fixed Pages
- User Preferences
- Initiating Scripts
- Shortcut Key Summary

This section describes basic system concepts, features, and standards of the user interface.

Page Components

Oracle Utilities Application Framework screens are comprised of the following main areas:

1. The Application Toolbar
2. The Page Title Area
3. The Object Display Area
4. The Sidebar Area



Keyboard Shortcuts	Description
`Alt+[`	Moves the cursor focus to the next main page component based on the standard browser keyboard navigation "order".
`Shift+Alt+[`	Moves the cursor focus to the previous main page component based on the standard browser keyboard navigation "order".

Note: The look and feel of the application may be modified after the product is installed. See Custom Look and Feel Options for customization information, including how to change colors, fonts, and other system features. The information provided in this document represents features and functionality available only in the delivered product.

The next topics provide more information about each component and the Script area, which appears in the Object Display area when applicable.

The Application Toolbar

The application toolbar includes the product's name along with several features described in the subsequent sections.

Note: Your specific application may introduce additional icons or features to the toolbar.

Note: If a domain name is configured for your environment, it is listed after the product name.

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> **Note:** The toolbar is responsive to window resizing or zooming in. When there is less room, the product name and the domain name are the initial elements to be reduced or removed altogether.

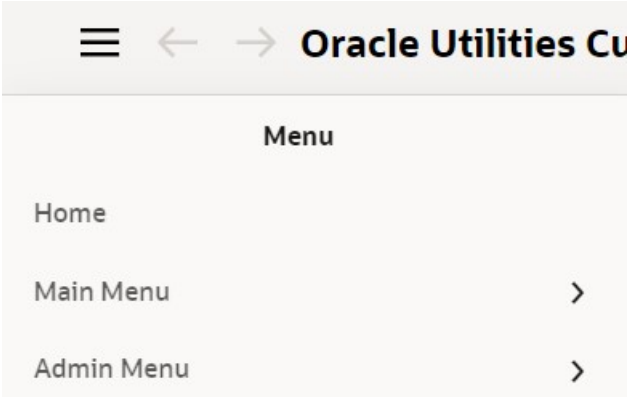
Menu

The Menu icon, , is available in the application toolbar to help you navigate to the different pages of the system.

You only see the menu items that you have security access for. In turn if you do not have access to any menu items in a submenu, the whole submenu is suppressed.

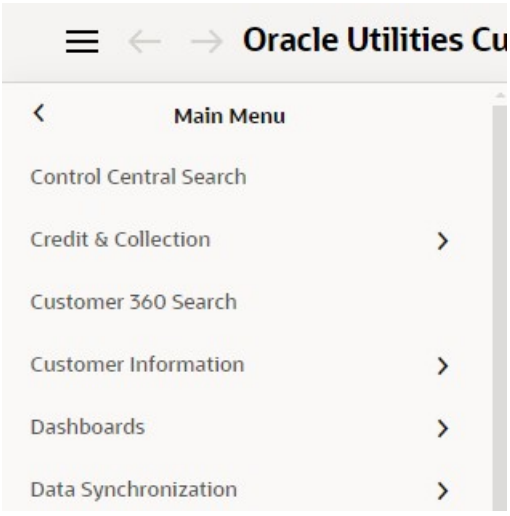
Keyboard Shortcut
`Ctrl+Alt+M`

The initial view of the menu includes a link to the Home page, plus entries for the Main Menu and Admin Menu.



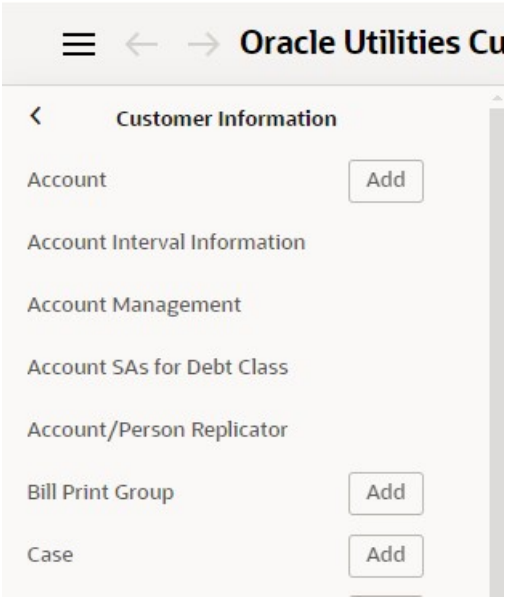
Main Menu

Clicking the Main Menu entry displays a submenu organized by functional area.



Clicking any functional area in turn displays a submenu that contains pages within that area.

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Some entries have an Add button adjacent. For these entries, clicking the menu item text opens the Search for that menu time. Click the Add button to add a new record for that search item. For entries without an Add option, select the menu item itself to launch that page.

How the Search and Add option behaves depends upon whether the maintenance page is fixed or portal-based.

Fixed:

- **Search:** Navigates to the page and displays a pop-up search window for the user to enter the search criteria and select the entity to display. Once the entity is selected, the maintenance page is displayed with the data populated in the fields.
- **Add:** Displays the maintenance page with empty fields so that the user can complete the information and save the entity.

Portal-Based:

- **Search:** Displays a search portal where the user can enter the search criteria and select the desired entity. Once the entity is selected, the user is typically taken to a maintenance portal or the information is broadcasted to other zones within the same portal.
- **Add:** Either navigates to a page where the user can select the entity type or business object, or directly to the input map where the user can enter and save the entity.

Users may also opt to use Menu Item Search to find a page.

Admin Menu

The admin menu functionality is analogous to the Main Menu functionality. One difference is that your implementation may opt to organize the admin menu alphabetically rather than by functional area.

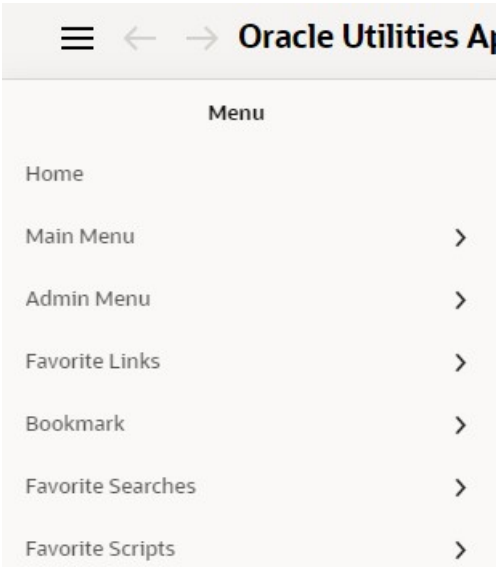
Note: Refer to Installation Options for information about the admin menu configuration options.

Note: Menu navigation paths referenced in the administrative user guide provide the functional grouping. If your implementation uses the alphabetic grouping, the page can be found in the alphabetic letter that is the first letter of the page name.

Favorites, Bookmarks

If you have any Favorite Links, Favorite Scripts, Favorite Searches or Bookmarks, entries to open those options are also visible when initially opening the menu.

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Clicking any of those menu entries displays you configured favorites or your saved bookmarks. The information is the same as what you see in the equivalent sidebar zone.

Back and Forward Arrows

The back and forward arrows, , in the application toolbar allow you to navigate between the most recently viewed pages.

Back

Click the **Back** arrow to open the previously visited page.

Keyboard Shortcut
Alt+B

Click and hold the **Back** arrow to open a list of pages previously visited that you can choose from.

Forward

Click the **Forward** arrow to return to the page that was most recently dismissed.

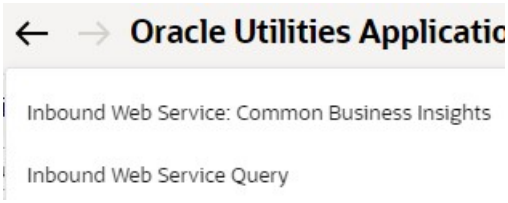
Keyboard Shortcut
Alt+G

Click and hold the **Forward** arrow to open a list of pages that you had visited but went 'back' from that you can choose from.

The **back** and **forward** arrows are enabled in the toolbar only when page use warrants their appearance.

Note that if the page has been configured to display an information string in the page title area, that information will also be visible in the dropdown of previous pages listed.

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Note: Under certain circumstances, such as revisiting a page that was left unsaved after being loaded with default data, a page may not appear as it did when you left it.

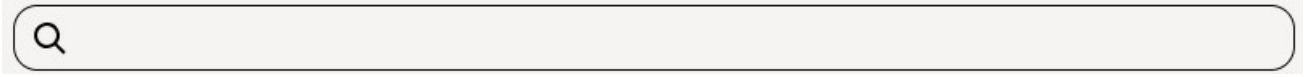
Search

The toolbar Search field and search icon provide the ability to search for specific menu items or, depending on your product, certain business entities.

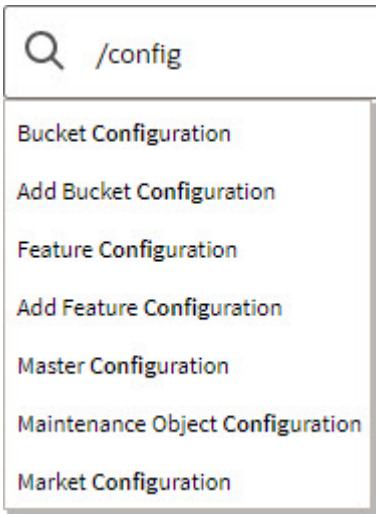
Menu Item Search

This search allows a user to enter the description of a menu item entry to navigate directly to the corresponding page or BPA script rather than using the menus to navigate to the desired page or script. If you start the search text with a slash "/", the search is confined to menu items. If you search for a menu item without a slash, the menu items are searched along with other unified search results.

Keyboard Shortcut
Ctrl+Alt+F



Typing text in the field preceded by a slash shows menu items whose descriptions include the typed text.



Note that only menu items within the Main Menu on page 3 and Admin Menu on page 4 that the user has security access for are included in the results. The text included in the search is taken from the menu item description. As described in Main Menu on page 3, menu lines often have options for search and Add. In most instances, the description of the "search" menu item is simply the menu entry text, for example **To Do Entry**. The description of the "Add" menu entry includes the word Add in front of the menu entry text, for example **Add To Do Entry**.

As mentioned in Menu Item Suppression, menu items will not appear if it is associated with a module that is suppressed.

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Note: When operating in debug mode, the description of the parent menu is displayed in parentheses after the menu item description.

Note: The toolbar is responsive to window resizing or zooming in. The search field may be removed when the toolbar area is reduced.

Unified Search

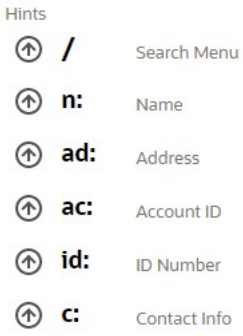
If your product has implemented unified search, you may use the toolbar search box to search for business entities. The unified search feature is a simplified version of your product's main search that allows you to lookup up records using free form text without leaving your current page. For more complex queries, use the link provided as part of the search box to navigate to your product's advanced search portal.



The type of business entities you may query and the filters you may use depend on the specific unified search implementation of your product. For example, if your product supports a search for customers based on their name or address, you may type in part of a name or an address to find matching results. If a unified search option is not configured for your product or you do not have security access to use it then the search box may only be used for searching for menu items.

To search for business entities, you may enter your search criteria in the following ways:

- Type in your search text in **free form**. For example, if your product's unified search option supports a search for customers by name or address, the text you enter may be considered as part of a name or an address.
- Depending on your product's unified search configuration, you may use specific **hints** to explicitly identify your filtering criteria. For example, an address filter may be associated with the hint name "ad:" allowing you to be more explicit and enter "ad: main" to find records by their address. Click the search icon in the search input area to view the hints that are configured for this search. You can also click the up arrow adjacent to the hint to automatically populate the hint text into the search.

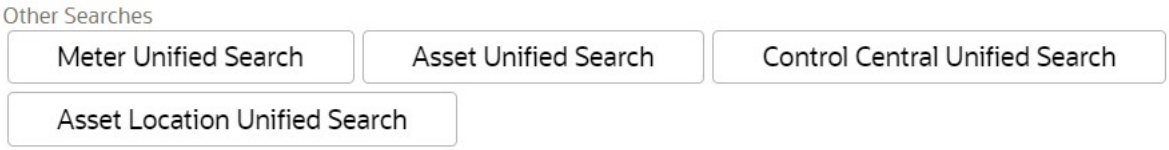


- You may use free form text or hints but not both.

As you type in your text, the application attempts to find matching records and presents the top most results for your review. You may select a record from the results list to navigate to the corresponding portal.

If your product has configured more than one unified search that you are allowed to use, one of the searches is the default search. Click the search icon in the search input area to choose a different search option. After selecting a different option, the hints for the selected search are shown and the Advanced Search link will navigate to the query portal configured for the selected search.

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Refer to your specific product documentation for more information about your product's unified search features.

Refer to Understanding Unified Search to better understand unified search configuration.

Home Icon

Click the **Home** icon, , on the Application Toolbar to open your home page. Your home page is defined on the main tab in User Preferences.

Keyboard Shortcut	Alternate Shortcut
`Alt+O`	`Alt+Shift+O`

Note: Refer to Shortcut Key Summary for information about the alternate shortcut.

Note: The toolbar is responsive to window resizing or zooming in. The home icon may be removed when the toolbar area is reduced.

Sidebar Toggle

Click the **Sidebar Toggle** icon on the application toolbar to open or close the Sidebar Area on page 25. The image displayed depends on your sidebar's configured location and whether it's visible or collapsed.

Table 1: Sidebar icon list

Location / State	Icon
Left / Visible	
Left / Collapsed	
Right / Visible	
Right / Collapsed	

Keyboard Shortcut
`Alt+J`

Note: Refer to Shortcut Key Summary for information about the alternate shortcut.

Closing the sidebar suppresses the refresh of the zones within the sidebar based on updates to the context. Opening the sidebar bar restores the display of the sidebar portal. Maximizing the sidebar then refreshes the zones with the latest appropriate content.

Your user preferences record is updated with the current state of the sidebar.

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Help Menu

The Help menu is available in the application toolbar to provide access to the following product support options. Open the menu by clicking the Help icon .

Help

Select the **Help** entry in the menu to launch the Oracle Help Center in a new tab. The application will automatically navigate to the context-sensitive help information within the help center. Alternatively, use the following shortcut key to launch help directly.

Keyboard Shortcut
`Alt+F1`

Prepare Issue Details

Select the **Prepare Issue Details** entry in the menu to launch a script to capture details of an error that needs to be reported. Refer to Prepare Issue Details for more information on this option.

Release Notes

Select the **Release Notes** entry in the menu to launch in a new tab the What's New content (for cloud customers) or the Release Notes (for on premises customers), for your product and version.

Enable | Disable Debug

If you have security access to the application service **F1OUDBUG**, you will see an option in the menu related to debug mode depening on its current state. If debug mode is currently not enabled, the entry says Enable Debug, otherwise it says Disable Debug.

About

Select the **About** entry in the menu to display a window that describes the current release information for your version of your product.

The about window shows a variety of information including:

- The logged in user ID
- The list of products installed in the application along with the release ID. This information comes from the installation record. Note that in a Cloud installation, only the Cloud product name and release ID are displayed. The details of the products that make up the Cloud installation are not displayed (but are still visible on the installation record).

User Menu

The User menu is available in the application toolbar to provide access to user-specific options. Open the menu by clicking the User icon 

.

Note: Configurable Menu. Additional menu entries may be visible in your implementation as this menu configuration allows for additional options to be defined.

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Preferences

Select the **Preferences** entry in the menu to view or modify your settings in a form that appears in the **Main** tab in the object display area. Alternatively, use the following shortcut key to access preferences directly.

Keyboard Shortcut
Ctrl+Alt+P

Refer to User Preferences for more information.

Logout

Select the **Logout** entry in the menu to complete your current session of the application. Clicking this item logs the current user out and displays the Welcome page so that another user can login. Alternatively, use the following shortcut key to logout.

Keyboard Shortcut
Ctrl+Alt+L

Page Title Area

The Page Title Area displays the page title and the page actions toolbar.

For certain pages in the system, the page title may be followed by an information string. It is only applicable to portal-based pages that display a single record. This information is only visible if the portal has been configured to display the primary key's information string. Typically only "stand alone" maintenance portals are configured to show the information string, whereas "all-in-one" portals are not configured this way.

Fastpath: Refer to Common Base Portals and Zones on page 41 for more information about standard base product portals.

Note: If an information string is long and would interfere with a page actions button, the information string will automatically be truncated and suffixed by an ellipsis, "…", indicating that more information is available. In this situation, the missing text can be viewed if the user hovers their mouse over the string.

Note: A portal-based page may be configured to suppress the page title altogether, including the page actions toolbar.

The Page Actions Toolbar displays standard control options, such as Save and Duplicate. More detail about the actions that may appear are described in the following section.

Page Actions Toolbar

In the Page Title Area, control functions appear in the Page Actions Toolbar; such as, Clear, Save, Duplicate, Delete and Refresh buttons.

Note:

Buttons in the Page Title Area appear as the function is available to the user; for example, the Delete button will not appear if the user has made any changes to the page's content, or does not have the necessary security rights for this action.

In addition, other functions that are specific to a portal-based page may appear in the toolbar, if configured. For example, the ability to navigate to the Search zone for a specific maintenance object may be visible on the maintenance portal.

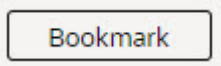
A portal-based page may be configured to suppress the page title altogether, including the page actions toolbar.

This section describes the standard features that are available in the Page Actions Toolbar.

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Bookmark Button

Click the Bookmark button on the Page Actions Toolbar to save the current page and context to the bookmarks list.



Keyboard Shortcut
Ctrl+Alt+B

Note: Secured. This button is secured using the application service **F1-BOOKMARKS**. Users that do not have security for the application service will not see the Bookmark button (or the corresponding sidebar zone).

After clicking the Bookmark button, you are prompted to provide a name for the bookmark. After saving, it is visible in the Bookmarks Zone, as well as through the Menu on page 3, allowing you to return to this page with this context loaded with one click.

Note: Unsaved data will not be included in the bookmark. If you view a record and make changes to data without saving the changes and then bookmark the page, the unsaved changes are not included in the bookmark information.

You may change the name of the bookmark or change the sequence of the bookmarks by navigating to the User - Bookmarks in the user preferences.

Next/Previous Item Buttons



The **Previous Item** and **Next Item** buttons appear in the Page Actions Toolbar under these conditions:

- You access a fixed page, meaning that it is not portal-based.
- You use a search page to display an item.
- There are multiple items in the search results list *below* or *above* the selected item.

If, for example, you enter search criteria of "Smith" on the User Search page, you might see the following results:

- Smith, Albert
- Smith, Peter
- Smith, Zane

If you select **Smith, Peter**, Peter's user information is displayed on the User page. If you then click the **Next Item** button, **Smith, Zane** will be displayed. In addition, because **Smith, Zane** is the last entry in the search results, the **Next Item** button is no longer needed and will not appear in the Page Actions Toolbar.

If you then click the **Previous Item** button, **Smith, Peter** will be displayed; click again and the **Smith, Albert** record will appear, and, because **Smith, Albert** is the first entry in the search results, the **Previous Item** button is no longer needed and will not appear in the Page Actions Toolbar.

Keyboard Shortcut	Alternate Shortcut
Alt+P	
Alt+N	Alt+Shift+N

Note: Refer to Shortcut Key Summary for information about the alternate shortcut.

Duplicate Button

Click the **Duplicate** button in the Page Actions Toolbar to create a duplicate of the currently selected object.

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Before the new object is added to the database, a dialog appears in which you must enter the unique identifier for the duplicate object. When you click OK, the system creates the record by copying the original record. It may be helpful to think of the duplication function as the equivalent of a "save as" action.

Keyboard Shortcut
`Ctrl+Alt+D`

Note: Copying ancillary information for a record sometimes requires confirmation during a duplication request. If so, you may also be asked if you also want to duplicate ancillary information. If, for example, you duplicate a user group, besides supplying the ID of the new user group, you are asked if all users in the original user group should be linked to the new user group.

This button does not appear in the Page Actions Toolbar when:

- Duplication is not supported for the current object.
- You are on a portal based page. (For these types of pages, if duplication is supported, the actions are defined in a zone on the portal.)
- You have made changes to the object without committing the changes to the database by clicking Save. (After making changes, you must either discard them using the **Refresh** button, or save them.)

Delete Button

Not all transactions have the capability to be deleted. Deletion is related to the business impact of the action. In some transactions, Delete is present for some scenarios and unavailable for others; for example, you may not be able to delete a record at a certain status level.

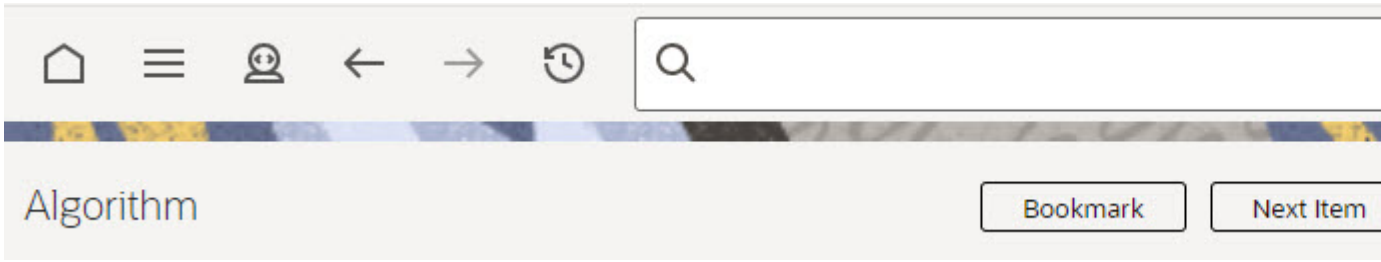
Note:

If you make a change to an object and do not save the changes to the database, you cannot delete the object until you either save the changes or refresh the object with the contents on the database.

Before you delete an object, the system verifies that the object is not referenced anywhere in the system. If it is, you cannot delete it. If, for example, you attempt to delete a user, the system ensures this user has not been referenced in a user group or on a To Do.

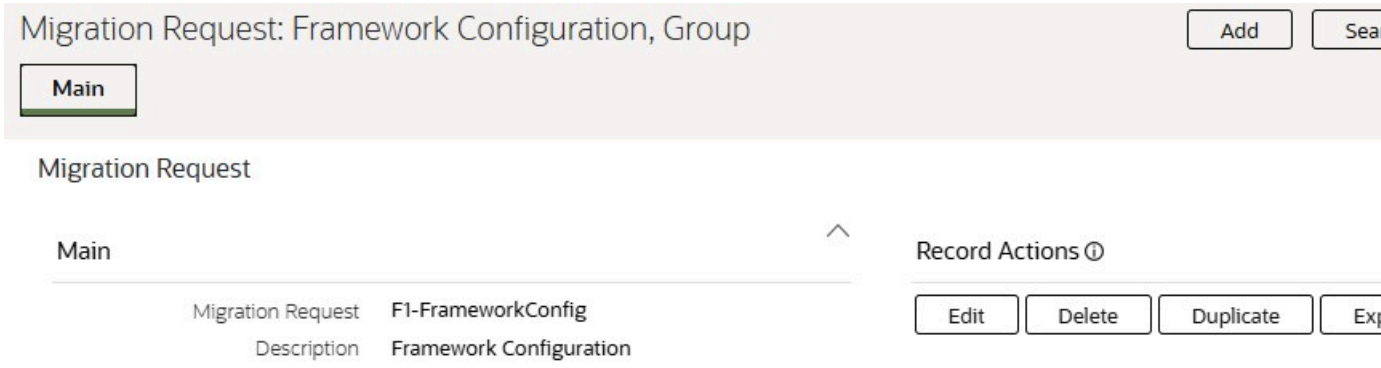
Depending on the type of page that you are using, the option to delete may vary.

- Fixed pages display a Delete button in the page actions toolbar when the option is available.

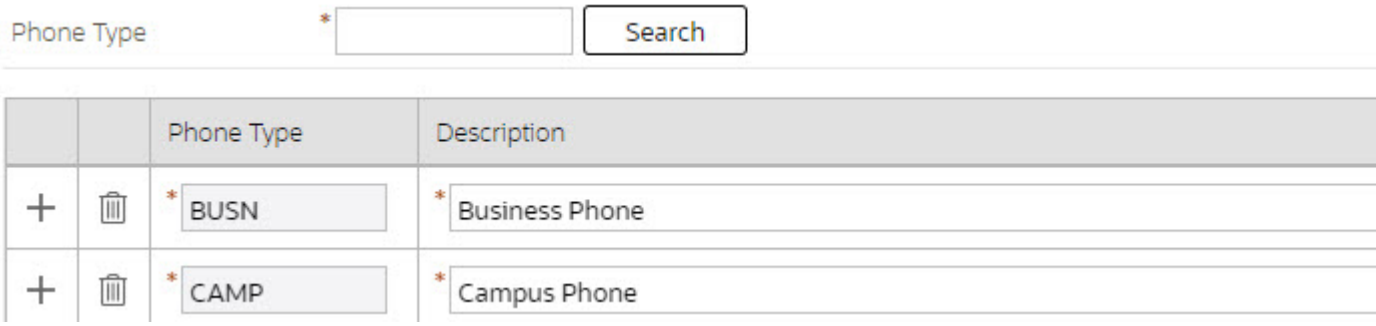


- Portal-based pages display the Delete button in the object-related map.

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- List style fixed pages commonly display the Delete button (garbage can icon) next to the entity in the list.



In all cases, before the object is deleted, a confirmation dialog is displayed.

CAUTION: A timeout situation could occur as the system attempts to verify the use of the deleted object if the object is referenced in many places *and* involves large volumes of production data. If this timeout situation occurs, you must with your database administration group to delete the offending object.

Clear Button

Click the **Clear** button to remove the values from the currently displayed object's fields. This action is typically used to clear input fields when adding a new object.



Keyboard Shortcut
Ctrl+Alt+C

Save Button

Clicking the **Save** button saves any changes you have made in the data on the current object.

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Keyboard Shortcut	Alternate Shortcut
Alt+S	Alt+Shift+S

Note: Refer to Shortcut Key Summary for information about the alternate shortcut.

The button does not appear unless:

- You enter a page in add mode and default values are loaded.
- You make changes to an object after it is displayed (note that you must tab or click out of the field before the Save button appears).

Refresh Button

Click the Refresh button to reload the values on the page with those from the database.



CAUTION: All unsaved changes are discarded.

Keyboard Shortcut
Alt+R

Object Display Area

The Object Display Area contains the details of the object(s) currently being viewed or maintained. For example, if you display a portal, its zones are displayed in this area.

Because many of the page components follow Internet standards of operation, the behavior of these types of components are not explicitly described. This section focuses on special features that are unique to the application framework.

Multiple Tabs

When a page in the application includes a lot of information, the page may be implemented with vertical scrolling to allow the user to view all the information. Or alternatively, the page may be implemented with several tabs, allowing the user to navigate between tabs to view or update information. The following image is a section of the User page showing the multiple tabs.

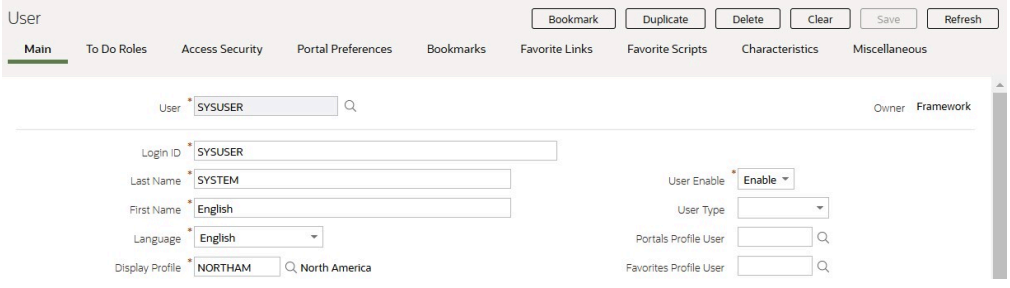


Figure 1: Multiple Tabs Example

The names of the tabs describe the type of information that will be displayed in the page when the tab is clicked. For example, if you click on the **Favorite Links** tab, the contents of the page show the favorite links configured for the user.

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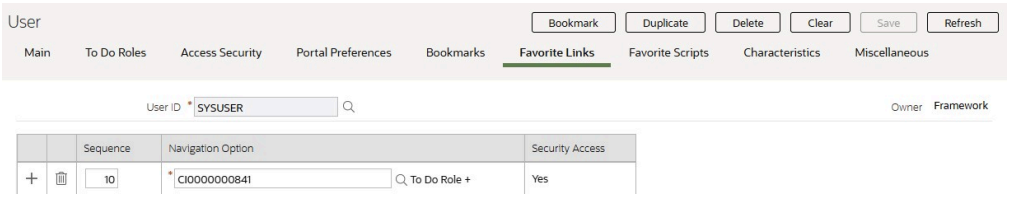


Figure 2: Multiple Tabs Example (After Favorite Links Tab Is Clicked)

Note: Hot key options. Rather than clicking on a tab, you can click `Alt+F2` or `Alt+Shift+F2` to scroll through the tabs. `F2` moves you through the tabs from left to right. `Shift+F2` moves you through the tabs from right to left.

Note: Hot key options. Use `Alt+` a number to navigate to the tab page whose relative position corresponds with the number. For example, if you press `Alt+6` on the above page, the **Favorite Links** tab will be displayed. `Alt+0` may be used to navigate to the tenth tab. If there are more than 10 tabs on a page, you must use the mouse or `F2` / `Shift+F2` to display additional tabs. Note that the numeric keypad on your keyboard cannot be used to implement this function.

Note: Returning to a page that contains multiple tabs. If you return to a page (by clicking the Back arrow, the page will be positioned on the last tab that was opened.

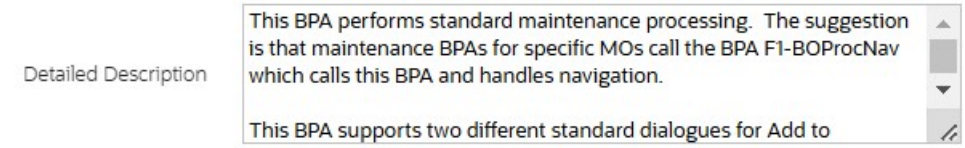
Note: Page versus Tab nomenclature. The documentation frequently refers to the contents of a given tab as a page. However, the page actually comprises the entire collection of tabs.

Text Box

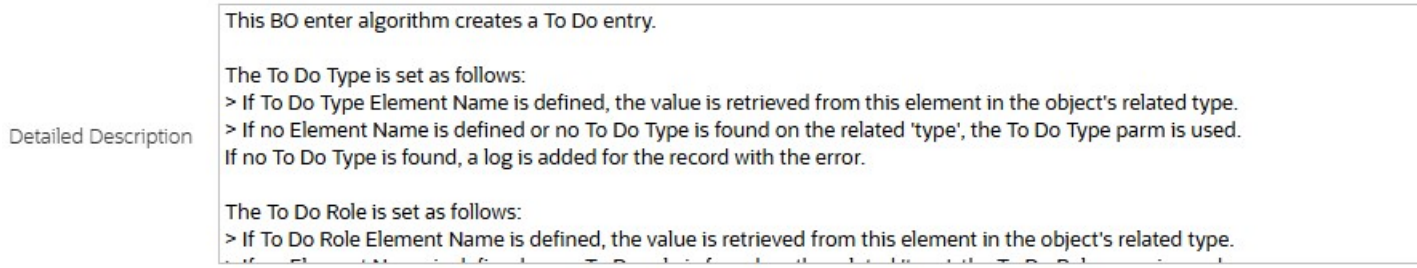
The following is an example of a basic text box:



If the text box is a large field, the text box may be configured to enable scrolling. In this situation, most browsers offer a widget in the bottom outer corner that allows you to resize the editable window.

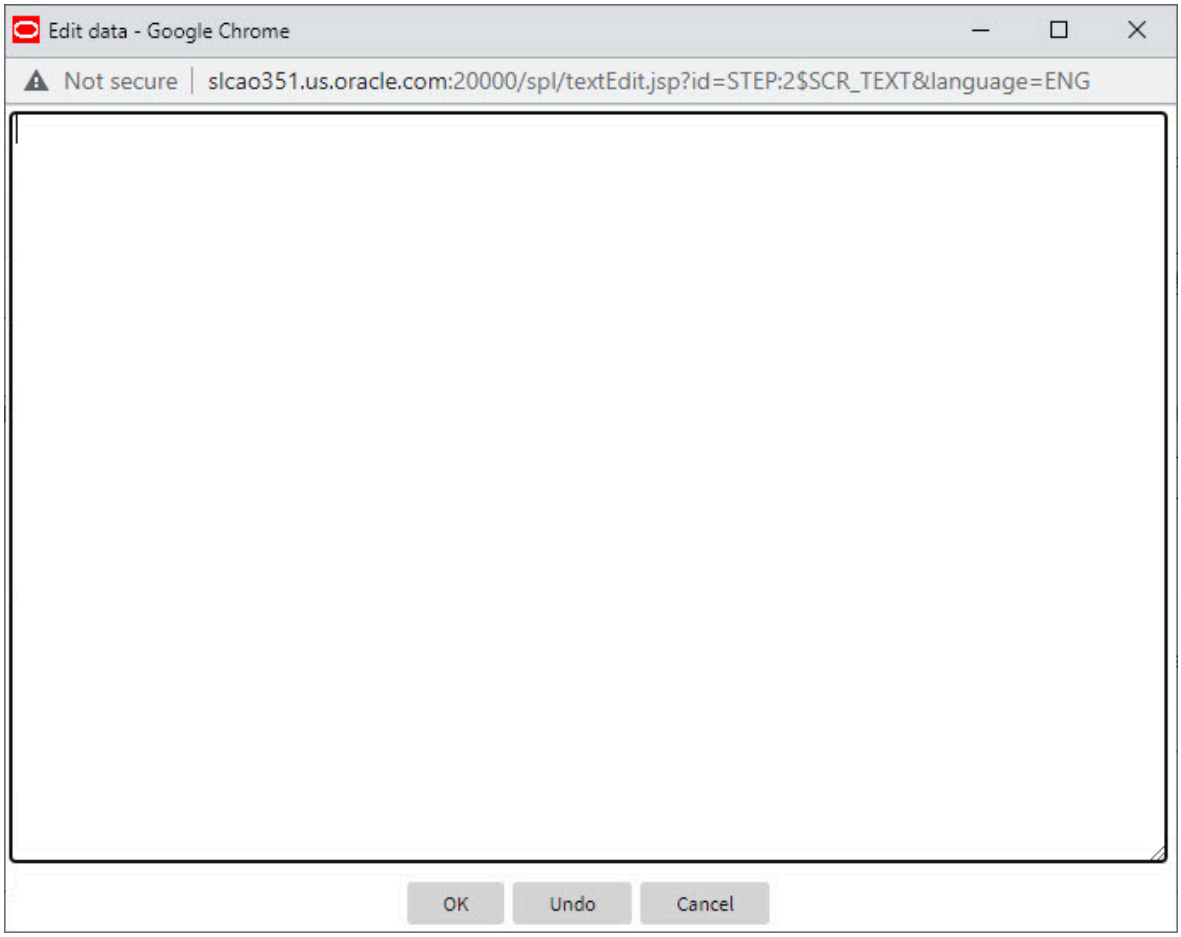


In our fixed pages, this type of text box also offers an expanded edit icon, (a pencil), that will appear adjacent to it.



- If you click the expanded edit icon, an editable pop-up window appears. If the field is not protected as a result of business rules for the page, you may modify the text in this window.

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Note: The following table highlights special characters that are converted to equivalent standard characters when entered in a text box.

Entered Character Description	**Unicode**	**Converted Character Description**
Curly left double quote.	U+201D	Straight double quote.
Curly right double quote.	U+201C	Straight double quote.
Curly left single quote.	U+2019	Straight single quote.
Curly right single quote.	U+2018	Straight single quote.
En dash.	U+2013	Simple hyphen.
Em dash.	U+2014	Simple hyphen.
Ellipse	U+2026	Three dots.
Middle dot (bullet / centered dot)	U+00B7	Asterisk.
Fraction 1/4 (using 1 character).	U+00BC	1/4 (using three separate characters).

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Entered Character Description	Unicode	Converted Character Description
Fraction 1/2 (using 1 character).	U+00BD	1/2 (using three separate characters).
Fraction 3/4 (using 1 character).	U+00BE	3/4 (using three separate characters).

Date and Time Fields

When both the date and time are required, the Date and Time fields typically look as follows:



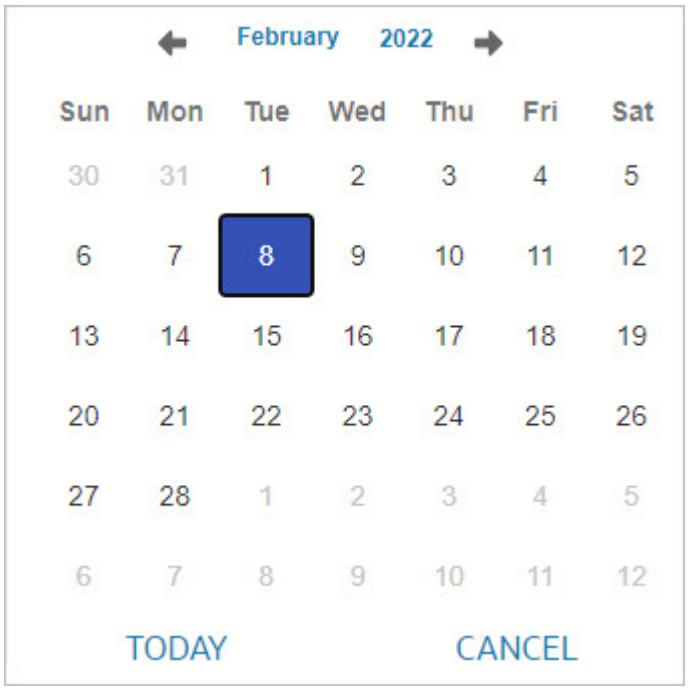
When only the date is required, the Date field looks as follows:



When only the time is required, the Time field looks as follows:



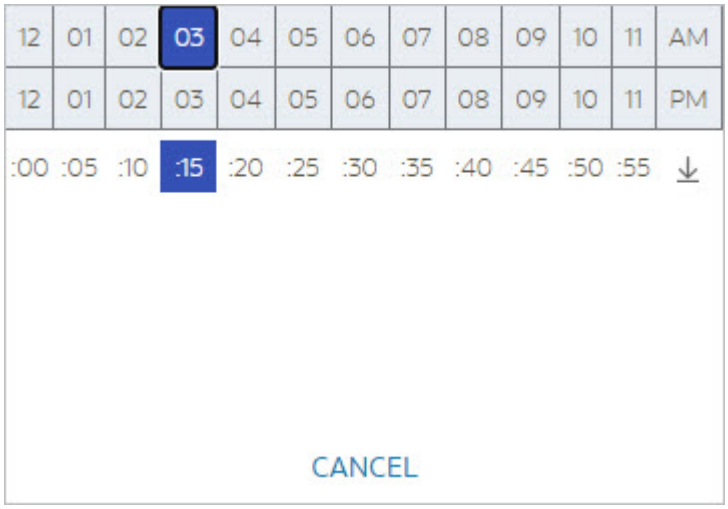
If you click on the calendar icon or press the Enter key while the cursor is positioned to the left of the icon in a Date or Date and Time field, the following window appears:



Click or press enter to select the date and populate the input field. Use the left and right arrows to scroll back or forward a month. Click on the 'Month' text to bring up a range of months to select from. Click on the year to bring up a range of years to select from.

If you click on the clock icon or press the Enter key while the cursor is positioned to the left of the icon in a Time or Date and Time field, the following window appears:

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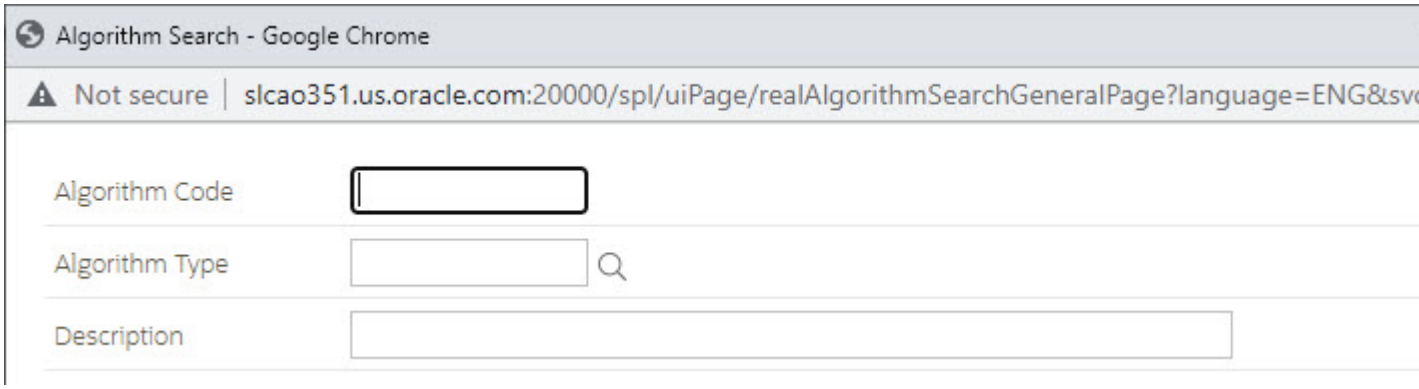
Select the hour then click or press enter on the minutes to select the time and populate the input field.

Search Button

The search button appears primarily as a magnifying glass.



When using a pop-up search window, the search button can appear as a button with its function labeled.



You can have the system search for an item that matches the data you entered using any of the following methods:

- Enter a value in the search field and press **Enter** while the cursor is in the search field. The system assumes you want to search for the value entered and pre-populates it in the search window's search criteria. If a unique match can be found, the system automatically populates the field with details corresponding to the record found. If a unique match cannot be found (either no matches or multiple matches), a search page opens containing selectable items.
- Click the Search button without entering a criteria. This will typically cause a pop-up search window to appear so that you can further refine your search.
- Enter a value and tab out of the search field. The system looks for a value that exactly matches what you entered. If it cannot find such a value, the search dialog will not be presented.

When an item is selected in the search page, the search page closes and the input field is populated with the value selected.

Note: Sorting columns within the search grid. You may click on the column heading of columns in a search grid to cause the contents of the grid to be sorted. Refer to Sorting Functionality for more information.

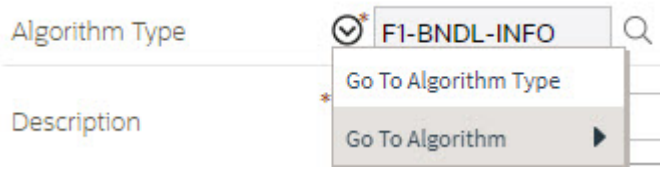
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Context Menu Button

The Context Menu button is a small arrow that appears adjacent to an object's value or information string. An example is shown below:



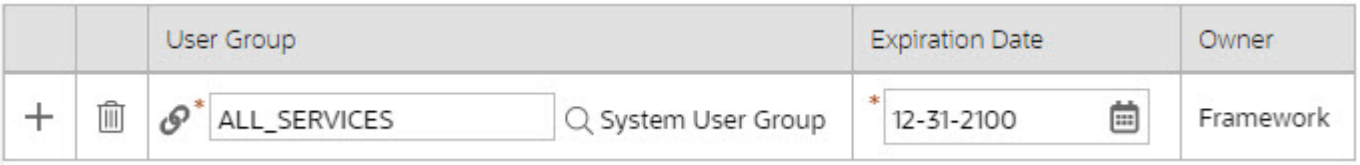
Context menus exist to help you navigate to other pages and populating the page with the current context (by passing the ID of the related object). In addition, the menu items offered in a Context Menu differ depending on the entity that the menu is related to; for example, when you click the Algorithm Type context menu, a pop-up menu similar to this appears:



Different context menus exist for each of the major objects in the system; for example, in Customer Care and Billing, the context menu for Premise contains premise-oriented menu items, whereas the context menu for Account contains account-oriented menu items.

Go To Button

Clicking a Go To button, , opens the page for the related object - it functions like a hyperlink.



Broadcast Button

Some zones have been configured to "broadcast" unique identifiers to other zones within the portal; if so, you'll see a broadcast icon, , in the first column. Clicking the icon causes specific zones to reload - these zones that have been configured to rebuild when the unique identifier is received. For example, you might have configured a zone to display the image of a bill when a bill ID is broadcast from an info zone.

Embedded Help Icon

The icon containing a small 'i' is an Embedded Help icon.

When an embedded help icon is clicked, a tool tip appears containing additional information.

Work Lists

The work list buttons can appear in a zone's column heading, .

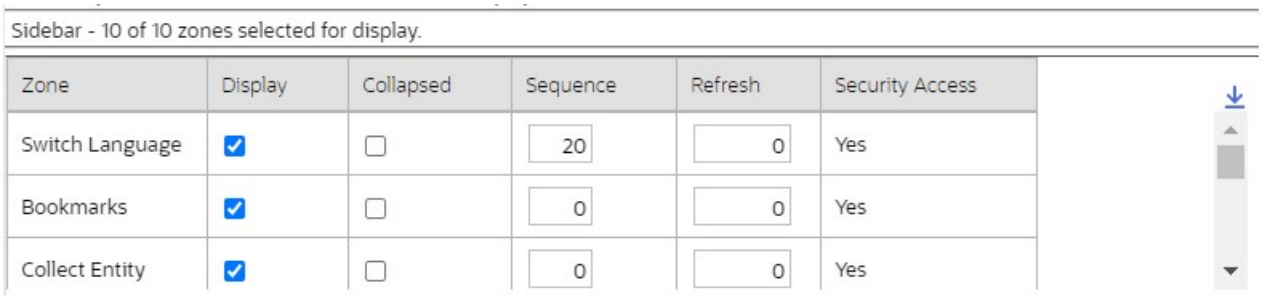
Clicking the icon results in populating the sidebar Work List Zone with the entire column. The user may use the Work List zone to easily process entries one at a time without returning back to the source query zone.

Note: The Work List zone is populated only upon user request.

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Scroll Bars with Dynamic Height

Sometimes the height of a grid isn't sufficient to display a grid's rows. When this occurs, a vertical scroll bar appears and an "expand button" appears above this bar, . For example, the following grid is not high enough to show all of a the available sidebar zones:



If you want to view all of the available zones without using the vertical scroll bar, you can you click the expand button. When clicked, the height of the grid expands to show all rows in the grid:



Notice, after the grid is expanded, the grid's vertical scroll bar disappears and the button in the upper corner becomes a Collapse Button, . If you click the collapse button, the grid will return to its original height.

Note: Search grids. Expand all functionality is not available in search grids.

Sorting Functionality

Grids have a heading row that contains labels for the columns. By clicking a column heading, you cause the rows to be sorted in the order of the selected column. By clicking on a column more than once, you cause the rows to be sorted in reverse order. Clicking the heading a third time removes the sorting function and returns the grid to its default display organization.

The following shows how information look after organizing the grid, clicking the column heading, by algorithm type (notice the icon in the column name).

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	Algorithm	Description	Algorithm Type
1	F1-OVRDT-ALG	Validates date in format YYYY-MM-DD	ADHV-DTD
2	F1-ACTIVEWS	Web Service - Verify Active Operations	F1-ACTIVEWS
3	F1-ATCHM-INF	Attachment Information	F1-ATCHM-INF
4	F1-ATSZCLVL	Attachment Size Class Validation	F1-ATSZCLVL
5	F1-BAT-LSDEF	Timed Batch - Service Level Based on 1.5 Timer Interval Factor	F1-BAT-LVSVC
6	F1-BFEMOLOG	Add Business Flag Error MO Log	F1-BFEMOLOG
7	F1-BFSTDNMVA	Business Flag Standard Name Validation	F1-BFSTDNMVA

Note: Sorting on dropdown values. If you attempt to sort a column that contains a dropdown value, the information is sorted in the order of the unique identifier associated with the dropdown value, not the description you see on the screen; for example, if you sort on a column containing unit of measure, the information will be sorted in the order of the unit of measure code, not the description that appears in the drop down. This means that the resultant sort will appear incorrect and therefore we discourage you from doing this.

Get More Functionality

Grids in fixed pages that can potentially contain a large number of rows have special processing that we refer to as Get More functionality. Rather than show every row, the system retrieves the first X records (where X varies from grid to grid, and from release to release) and appends a Get More button to the bottom of the grid:



When you click the **Get More** button, the system appends the next X rows to the bottom of the grid.

Note: The absence of a "get more" button. For pages configured to include Get More, if no button appears at the bottom of the grid, this means all of the rows are displayed.

Note: Search grids. The Get More function is not available in search grids.

Adding and Removing Rows Using Arrows

In some editable grids, a new row can be added to another editable grid (the grid on the left) by clicking the Add item button, , of the desired row in the grid on the right:

	Sequence	Description
	10	Winter kWh charge, first 500
	20	Winter kWh charge, remaining

	Sequence	Description
	5	Service Charge

When the Remove item button is clicked, , the row is transferred from the grid on the right to the grid on the left. This change will not be committed to the database until you save the object being maintained

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Reorganizing Items Using the Up and Down Arrows

Occasionally, rows can be repositioned in an editable grid by clicking up and down arrows. The following is an example of such a grid:

		Merge Type	Sequence	SQ Rule
		Original	10	DA Credits
		Original	20	Calc. Number of Days In Bill Period
		Original	30	Copy SQs from Master SA to sub SA

Notice the following about such a grid:

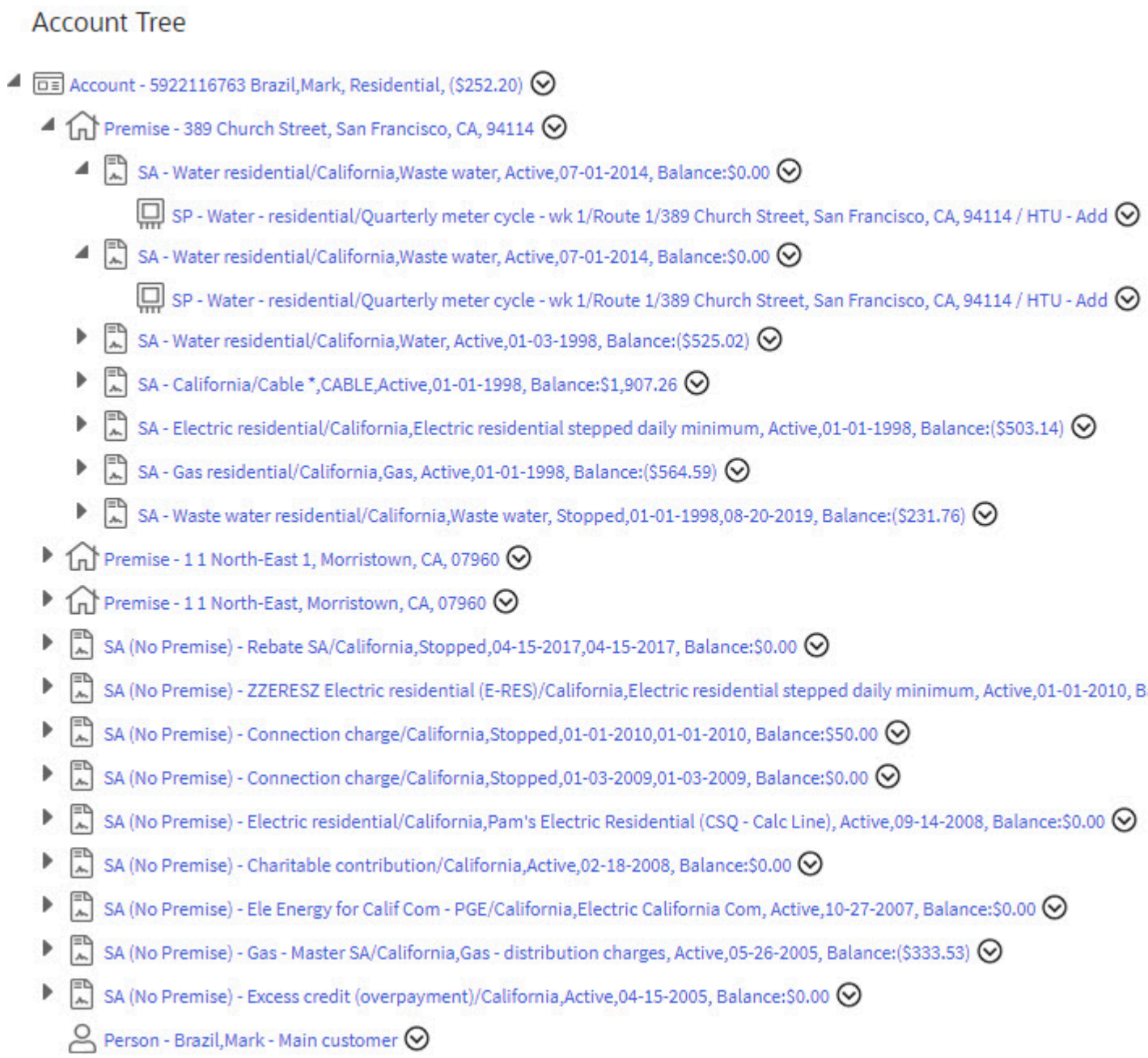
- The up arrow is dim in the first row. This is because it can't be moved further to the top.
- The down arrow is dim in the last row. This is because it can't be moved further down.
- The up and down arrows are usable in all other rows. Each time you click one of these arrows, the respective row is moved up or down one row.

Note: Reminder. When you move rows into a grid, the system does not apply the change to the database until you click the Save button (which commits the entire object to the database).

Trees

Trees are used to illustrate complex relationships between objects. The following is an example from Oracle Utilities Customer Care and Billing of a page with a tree that is expanded:

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The following points describe how to use trees:

You can expand and contract the nodes in a tree by clicking on the icon that prefixes the node (you can also click the arrows to expand and contract a node).

Note: Expand all. If you press `Ctrl` while clicking on an icon that prefixes a node, all child nodes (and their children) expand.

You can click the context menu button to cause a context menu to appear. You can navigate to any of the pages that are presented on this menu. Refer to Context Menu Button for more information.

You can click on the information that appears in an underlined node to drill into the page in which the object is maintained. For example, if you click on the account information, you will be transferred to the Account - Main page.

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Note: Important! If you make changes after expanding a tree's nodes (e.g., by drilling down on a Premise and changing the premise's address), the tree will contract to the first node if you return to the page.

Nodes in trees fit into two broad categories:

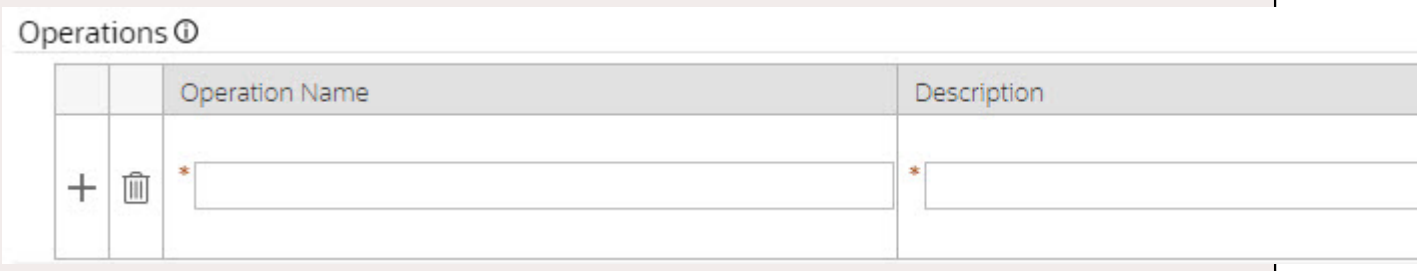
- **Information nodes.** Information nodes highlight the existence of other data. For example, on the Control Central - Bill Payment Tree, a node exists to highlight the existence of new financial transactions that were created since the last bill was completed.
- **Data nodes.** Data nodes show information about objects in the system. For example, data nodes exist on the Control Central - Bill Payment Tree that show bills and payments.

Required Field Indicator

An asterisk (*) is used to indicate that a field is required. The system determines this based on the field's configuration. When a field becomes required because of an algorithm and not the field's configuration, however, the system will not add an asterisk.

Note:

If a page includes a grid, fields within a row may be marked as required.

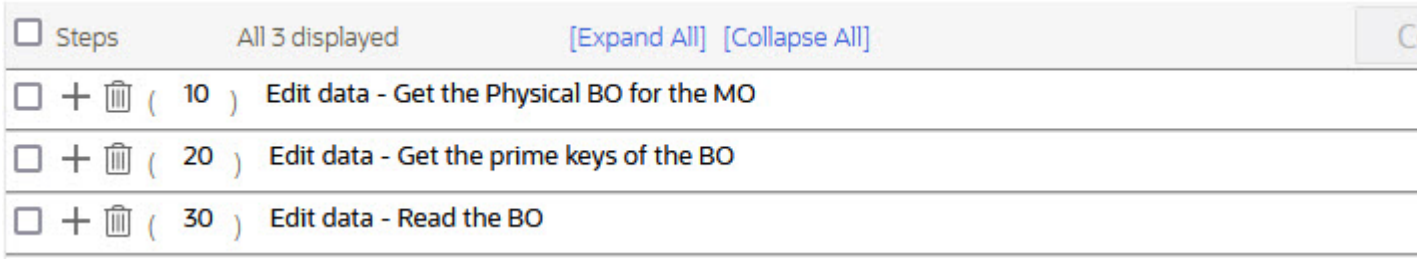


In this situation, the fields within the grid are **only** required if the row is being populated.

Accordion Windows

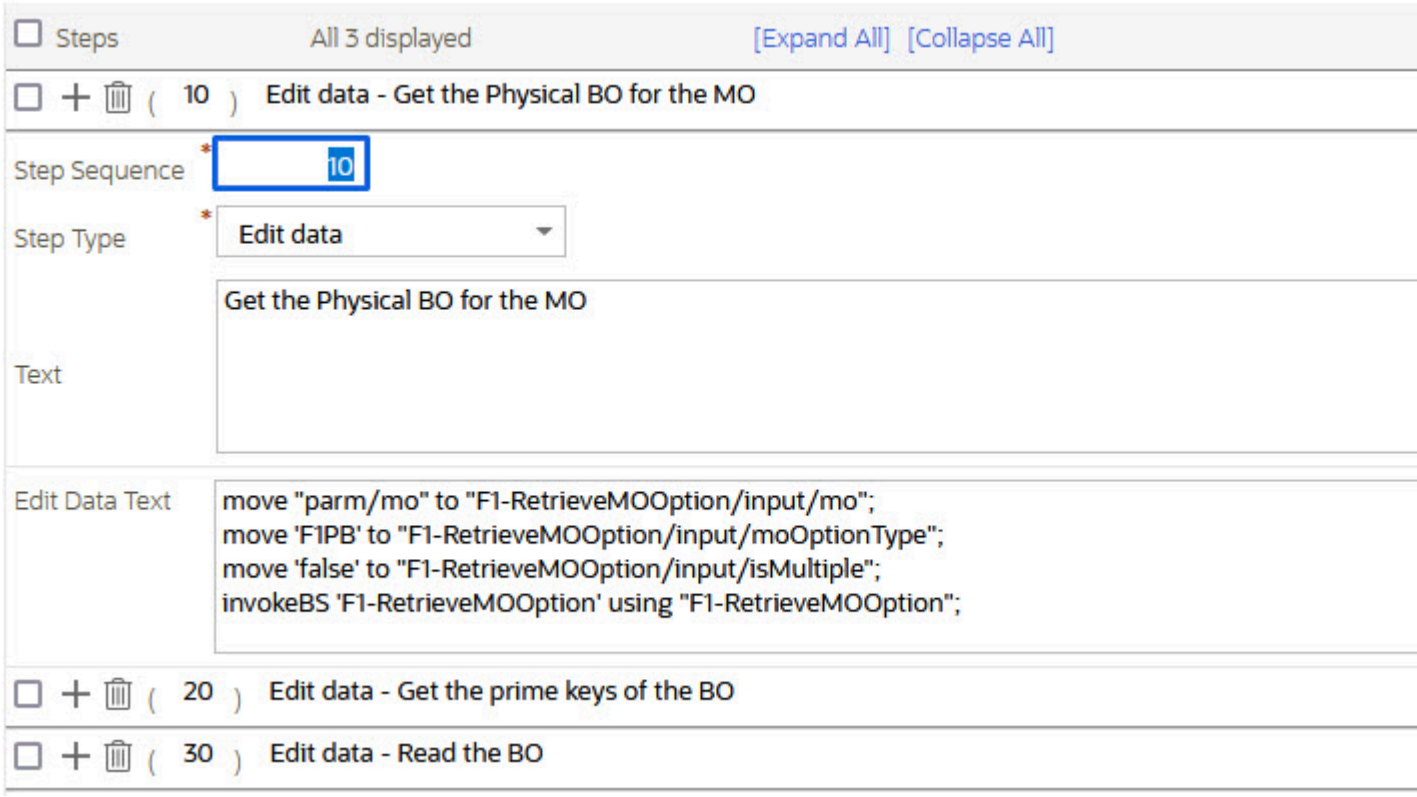
Accordion windows are used when the data held in an object's rows does not comfortably fit into a grid.

Each row in an accordion has a header that summarizes a row's details. When you click a header, the row expands to show the details. The following is an example of an accordion where all headers are collapsed (meaning that only summaries of the rows' details are shown):



When you expand a header, its details are exposed. For example, the following shows the same accordion after the third row is expanded:

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Note: You must expand to update. In order to update a row in an accordion, you must expand it.

Sidebar Area

The sidebar is a special area that is always available for display on the desktop. It displays the zones defined in the Sidebar Portal on page 28.

Note:

Open / close the sidebar. You can open or close the sidebar using the Sidebar Toggle on page 8.

Minimize the sidebar when launching the system. If desired, a URL parameter may be used to minimize the sidebar when launching the system, using the parameter **minSidebar=true**. Refer to Creating Application Links in External Applications for more information and examples.

Adjusting the sidebar width. You can adjust the width of the sidebar by moving the slider that separates the sidebar from the object display area. This also updates your user preferences with the new width.

The sidebar area is displayed after the Object Display area by default. (On the right for a left-to-right language and on the left for a right-to-left language). You have control over its location, width and more as part of your user preferences.

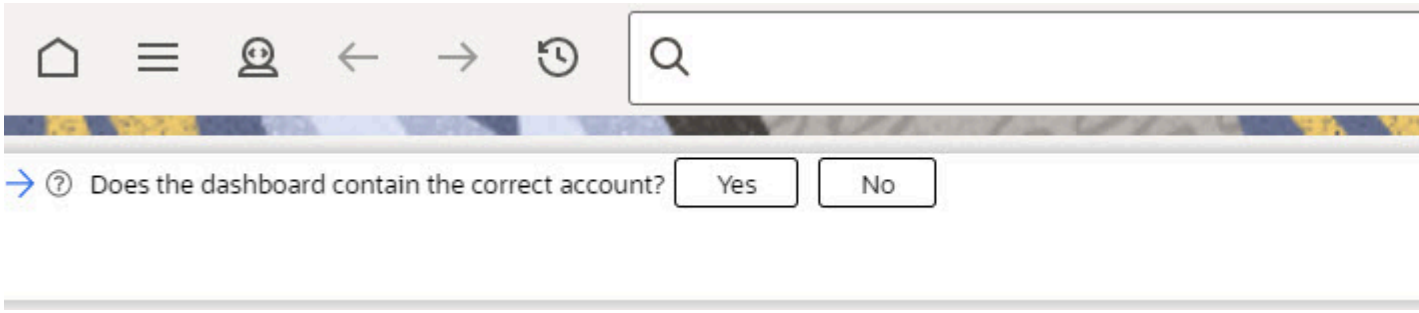
Script Area

CAUTION: Guiding scripts that interact with the user using the script area are limited to surf over fixed pages only and are considered legacy functionality. This technique is not supported on top of portal pages and is planned to be deprecated in a future release.

When a script is initiated, the object display area shifts down to make room for the script area.

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The information in the script area takes you through the steps in the selected business process (provided by your implementation team).



Portal Pages

This section describes using portals and zones to find and display information. This is the preferred technique used by the base product for building user interfaces.

Additionally, portals and zones may be configured by your implementation to supplement the base package provided functionality.

The contents of this section provide background information about portal page behavior.

Portals Are Made Up Of Zones

The term "zone" is used to describe a section on a portal. Each zone has a heading and content.

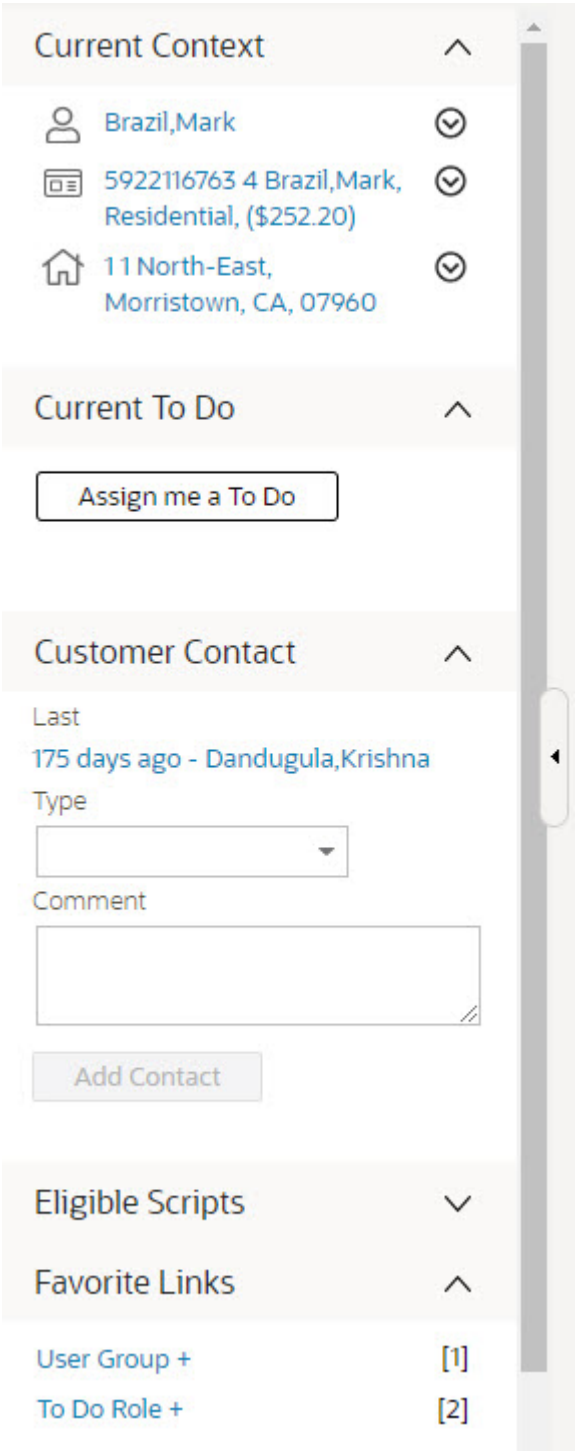
Keyboard Shortcuts	Description
`Alt+]`	Moves the cursor focus to the next zone on the page based on the standard browser keyboard navigation "order".
`Shift+Alt+]`	Moves the cursor focus to the previous zone on the page based on the standard browser keyboard navigation "order".

The following is a portal with seven zones:

- Current Context
- Current To Do
- Customer Contact
- Eligible Scripts
- Favorite Links

Note: This example may not be available in your application; it is used for illustration purposes only.

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Users Must Be Granted Security Access To Each Zone

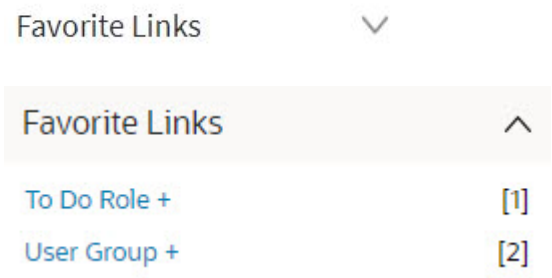
A user must be security granted access rights in order to see a zone on a portal.

Fastpath: Refer to Granting Access to Zones for information .

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Zones May Appear Collapsed When A Page Opens

Zones may be designed to appear collapsed (or minimized) when the portal is initially displayed. To view the information in a collapsed zone, the user can press the zone's expansion button, , to either expand or collapse the zone:



A zone's data is only retrieved when it is expanded.

Some Portals Allow User Customization

There are some portals in each base product that are configured to allow user customization. In this case, the portal is visible on the user's portal preferences. For these portals each user has control over the following:

- Which zones appear on their portal
- The order in which the zones appear
- Whether the zones should be "collapsed" (i.e., minimized) when the portal opens.

Users define their preferences by clicking the User Preferences button. Pressing this button transfers the user to the User Preferences page on which their Portal Preferences can be defined.

Portals used for base product query and maintenance pages are typically configured to not allow user customization.

Sidebar Portal

The sidebar is a special portal displayed in the Sidebar Area on page 25. Its zones contain tools and data that are useful regardless of the object being displayed.

Functional Grouping. Depending on your configuration, content may be organized in functional areas with key information presented in the main focus area along with ancillary areas for favorites and tools. Each functional area is a sidebar portal enabled by the "Sidebar Configuration" extendable lookup. Functional grouping is disabled when the legacy sidebar portal "CI_DASHBOARD" is marked active and other functional sidebar portals are marked inactive in the sidebar configuration definition.

When your implementation is configured to be organized by functional area, you see icons at the bottom of the sidebar area. In this image, the 'target' icon is selected, indicating that you see the sidebar zones in the 'main' functional area. Click the 'star' icon to show the zones in the 'favorites' functional area. Click the 'wrench' icon to show zones in the 'tools' functional area.



The subsequent topics describe the zones that are provided by the framework product for this portal. Please note the following additional information about the sidebar portal that may impact how it appears.

- **Additional zones may be available in other products.** The zones described below are available in every base product. Please refer to the product-specific documentation for additional sidebar zones available in your product.

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- **Context Sensitive Zones may appear.** Some pages may define additional zones that should appear in the sidebar only if that page is displayed. These are referred to as Context Sensitive Zones.
- **Sidebar zones are configurable.** The sidebar portal is configured to allow a user to define preferences for it. Refer to Portal Preferences for more information.

Note: Security. As a general rule, sidebar zones each refer to a unique application service so that a security administrator may configure which users are allowed to have access to which zones. Note that the user portal preferences indicates which zones a user has security access to.

Bookmarks Zone

After clicking the Bookmark button and saving a bookmark, it is visible in the **Bookmarks** zone. Clicking one of the links in the zone navigates to the page where the bookmark was saved and loads the information related to the record that was displayed when the bookmark was saved.

Click the trash can icon to delete the bookmark.

Note that a user may change the name of the bookmark or change the sequence of the bookmarks by navigating to the User - Bookmarks in the user preferences.

This information is also visible in the Favorites, Bookmarks on page 4 section of the menu.

Collect Entity Zone

The **Collect Entity** zone provides a quick way to add or remove the entity currently being displayed to and from the migration request in context. This is mainly useful when reviewing data to export and while doing so maintain the export list. The zone automatically appears once an **Entity List** migration request is visited and set in context.

Current To Do Zone

The **Current To Do** zone is designed to streamline the process of working on To Do entries from assignment to completion. It displays key information about the user's current To Do entry and provides functions that help minimize the number of steps it takes to resolve the entry and potentially other entries related to it.

Important: The information here assumes that you have configured the system to use the ability to have a substatus of Assigned, which includes the **In Progress** value. If you are not taking advantage of the substatus, then see below for information about how the functionality described here works differently.

The following sections provide more detail about the zone.

To Do Entry Visible

If you have a To Do Entry that is currently **In Progress**, its information is visible in this zone when you launch the system. As described in Working On A To Do on page 59, most of the actions in the system that cause a new To Do Entry to be pushed to this zone cause that To Do Entry to be updated to **Assigned / In Progress**. If you use those actions then the To Do Entry in this zone will always be your current **In Progress**. However, there are use cases that populate the To Do entry without assigning it to you. If you perform those actions, the To Do Entry that is pushed to this zone and remains until you perform a subsequent action that refreshes the information in this zone.

Next To Do Assignment

Users may have the option to click the **Assign me a To Do** button to request the next To Do entry they should work on. This functionality is optional and can be configured to follow your organization's business rules in determining the next task for a user. For example, if your organization practices work distribution "on demand", this feature can be configured to find the highest priority entry a user can work on and assign it to the user. Refer to work distribution for more information on this business practice.

Note: Next To Do Assignment Rules Are In A Plug-in. Refer to Installation Options for more information on how to configure the system to take advantage of this function.

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If the system is successful in determining the next entry the user should work on, this entry is assigned to the user and moved to In Progress and becomes the user's current To Do. Its information is displayed on the zone.

To Do Information

The user's current To Do may be set using the Next Assignment algorithm, or by actions described in Working On A To Do on page 59. Once a current To Do has been set, the zone displays details related to the To Do.

The **Message** describes why the entry exists. The message description allows the user to drill into the page on which the entry's respective object is displayed. For example, if the entry is associated with an asset that needs review, the user is brought to the asset page to view the information and potentially take action. If the To Do type has been configured to associate a script with this To Do entry's message number, then instead of being taken to the respective page, the associated script is launched.

Info displays the standard To Do information. An icon appears if there are comments on the To Do and a Log Entry icon appears if there is a log entry of type **Forwarded**, **Sent Back** or **User Details** on the To Do. Clicking the description drills into the To Do entry page allowing the user to view more information about the entry or make changes to it as needed.

Depending on the status of the To Do entry and whether you are allowed to perform the actions, the following action buttons may be visible.

- You may use the **Complete** button in the zone to complete the current entry.
- If the current entry is **In Progress** and assigned to you, you may use the **Hold Progress** button to put the entry into the **On Hold** status. This is useful if your implementation wants an accurate picture of how long it takes to work on a To Do entry. You can put the entry on hold if you need to wait for some event to occur before continuing progress on the entry.
- You may see the **Start Progress** button if the current entry is assigned to you and not currently in progress. You may also see this if the current entry is Open and in a role that you are in. (This may happen if you drill into an open To Do from the To Do Search page.) Clicking this button puts the entry into **In Progress**.
- You may see the **Stop Work** button if the current entry is assigned to you and is not currently **In Progress** or **On Hold**. Clicking this button returns the entry to the **Assigned** state (resetting the assigned substatus).

Next / Previous Buttons

The **Previous** and **Next** buttons are enabled on this zone under the following conditions:

- The user selected an entry either on the To Do List page or the To Do Search page.
- At least one other entry exists *below* (for Next) or *above* the entry selected (for Previous).

Note: The system recommendation is to use the To Do Management on page 63 or To Do Dashboard / To Do Details portals to manage work lists of To Do entries. Those pages use the worklist zone to manage the list and these Next and Previous buttons are not applicable.

Clicking **Next** or **Previous** will bring the user to the transaction indicated on the To Do Entry's message, where its respective object is displayed. It also makes that To Do the Current To Do displayed in the zone.

Keyboard Shortcut	Comments	Alternate Shortcut
`Alt+Y`	Previous To Do	
`Alt+Z`	Next To Do	`Alt+Shift+Z`

Note: Refer to Shortcut Key Summary for information about the alternate shortcut.

Note: When a user drills down on a To Do entry from the To Do List page, the system automatically changes the status of the entry to **Assigned** and **In Progress**. If **Next To Do** or **Previous To Do** is subsequently used to scroll through this list, the system does *not* change the To Do entry's status. You may click the **Start Progress** button in this zone.

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Related To Do Entries

If the To Do entry has non-complete related entries a summary **Related To Do** description appears. The description states the total number of related entries, how many are still in **Open**, how many are assigned to current user and how many assigned to others. This hyperlink navigates to the To Do Search query allowing you to review the related entries. At this point you may decide to assign entries that can be positively identified as being caused by the same problem as the current To Do also to you.

If at least one related To Do entry is **Open** or also assigned to you, the **Complete All** button is visible. If you determines that the related To Do entries have been resolved with the appropriate action taken, the button may be used to complete in one step the current entry and all related entries that are **Open** or assigned to you.

If the related entries are not resolved with one action, you may opt to use the **Complete** button to complete the current entry alone and work on related entries one at a time. Using the related To Do information hyperlink you may navigate to the To Do search page and drill into the first related To Do to work on using the message hyperlink. This entry now becomes you current To Do and the **Next** and **Previous** action buttons are set to scroll through the related entries list. It's not automatically assigned to you. Use the **Start Progress** button in this zone to assign it to you and start progress.

Implementations Not Using Substatus

If your implementation is not taking advantage of the substatus as described in The Lifecycle Of A To Do Entry, some functionality described above works differently.

When launching the system, no To Do Entry is populated in this zone by default. To Do entries only get populated in this zone when you take an explicit action.

Any action that automatically assigns you a To Do Entry only performs that step and does not update it to **In Progress**.

The buttons **Start Progress**, **Hold Progress** and **Stop Work** are never visible.

If you are using To Do Search and drill in on an entry before assigning it to you, you'd need to go back to To Do Search page or drill into the To Do Entry page to assign it to you. Similarly, if you use the Next / Previous buttons to work through a list from either To Do Search or To Do List where the entries are not already assigned to you, the recommendation is to return to the respective pages to assign them to you.

Favorite Links Zone

Each line in the **Favorite Links Zone** corresponds with one of the user's favorite links (e.g., transactions). Clicking on a line invokes the transaction. The first nine entries can be invoked by pressing an accelerator key (`Ctrl` + the number of the relative position of the link in the list). Note that the numeric keypad on your keyboard cannot be used to implement this function.

Users define their favorite links by clicking the User Preferences button. Clicking this button transfers the user to the User Preferences page on which their Favorite Links can be defined.

This information is also visible in the Favorites, Bookmarks on page 4 section of the menu.

Favorite Scripts Zone

The Favorite Scripts zone lists the business process assistant (BPA) scripts that you have defined on your user preferences. You can click on a script to execute it. You can click the **Search** button in the zone to search for other scripts.

> **Note:** If you do not see the Favorite Scripts zone in the sidebar, navigate to User Menu and click the **Preferences** menu item to display the User - Portal Preferences page. Under the Sidebar Portal row, select the **Display** option for the Favorite Scripts zone.

This information is also visible in the Favorites, Bookmarks on page 4 section of the menu.

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Favorite Searches Zone

If you marked a saved search as a favorite using Saved Searches functionality, the search is visible in the **Favorite Searches** zone. Clicking one of the links in the zone navigates to the page where the search was saved and populates the filter values and executes the search.

This information is also visible in the Favorites, Bookmarks on page 4 section of the menu.

Switch Language Zone

The **Switch Language** zone is used to switch the application's language. Only languages that are supported by your implementation will appear.

To switch the application's language, choose the desired language and press the **Refresh** button.

Note: This zone only appears if more than one language is enabled in your implementation. You may further limit which users see this zone by not granting security rights to the zone's application service.

Tags Zone

The **Tags** zone provides a quick way to associate the entity currently being displayed with an entity tag or remove any of the tags it currently has. Tagging an entity may be useful to highlight various contexts in which it can be used, for example for testing or reporting purposes. Refer to Defining Entity Tags for more information.

Note that the zone is visible only when there is an entity in context, i.e. there is an entity to tag, and the user has application security access to this zone.

To Do Summary Zone

The **To Do Summary Zone** may appear in the sidebar area for backward compatibility reasons. The zone has several purposes:

- It presents a summary of the To Do entries that have been assigned to you.
- The colored "age bars" highlight the age of the To Do entries. The colors red, yellow and green are used to highlight the relative number of old, middle-aged and new To Do entries. The age associated with each of these colors is user-configurable. Note, you can hover the cursor over an "age bar" to see the number of To Do entries.
- If you click on the To Do Type description, you'll be transferred to the To Do Management portal where these To Do entries will be displayed. From this page, you can drill down to the specific entries.

Note: Time saver! Use the worklist button when working on an entry in the To Do Management portal. All the individual To Do entries will be visible in the Worklist sidebar zone, allowing you to work through additional To Do entries without returning to the To Do Management portal.

Work List Zone

The **Work List** zone is populated when a user click the Work Lists icon in an info or query zone. When you click the link of the work list entry, the system does whatever it would have done if you had clicked on the hyperlink in the zone. The system marks the current entry with a star. It marks any previously worked entry with a checkmark.

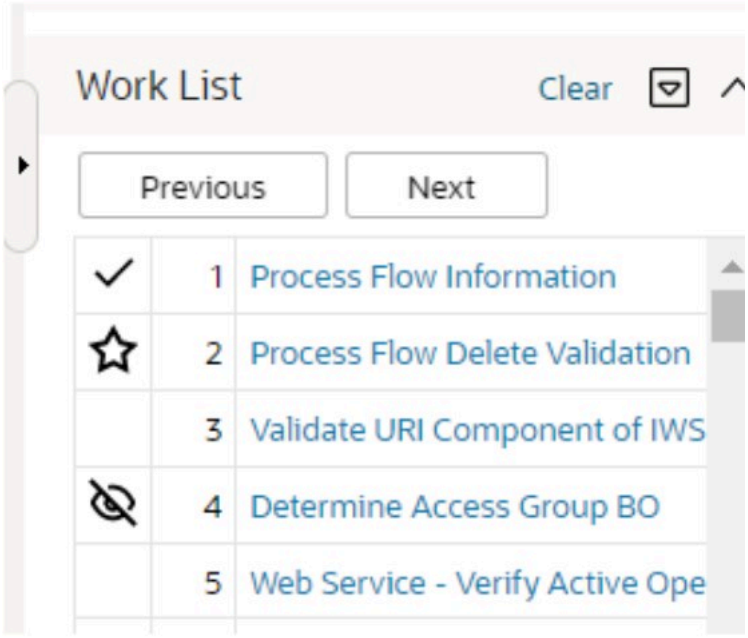
Previous and Next buttons are available in the zone allowing you to go to the next or previous entry without having to locate it yourself and click the link.

You may actively mark an entry to be ignored by the Previous or Next button by clicking the icon column for that entry. An icon of an eye with a slash through it is visible. You can click the icon to re-include that entry in the previous / next action.

The work list stays populated until you either click the Clear link in the zone's header or you overlay the work list by clicking a different column's work list icon.

The image shows a work list zone illustrating that the first entry was "visited", the second entry is the current one being viewed and the fourth entry is marked to skip or ignore.

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Zone Types and Characteristics

The topics in this section describe common zone types, function, and common characteristics.

Fastpath: Refer to The Big Picture of Portals and Zones for a description of general portal and zone functionality.

Common Characteristics of Zones

The following topics describe common characteristics of all zone types supported by the base package.

Zone Visibility

A zone may be configured to dynamically be visible or completely hidden depending on the information being displayed. When hidden, not even the header is displayed.

For configuration information, refer to Zone Visibility Service Script.

Explorer Zones

The product provide several zone types that are used to find or display a set of information. These are called explorer zones. There are two types of explorer zones:

- **Info zones.** An info zone displays a list of information about an object. These types of zones often display information without requiring any input from the user.
- **Query zones.** A query zone allows users to find objects matching a given search criteria.

Virtually every aspect of an info or query zone is controlled by its zone configuration. However, most share basic common components described in the subsequent sections.

Search Criteria / Filter Area

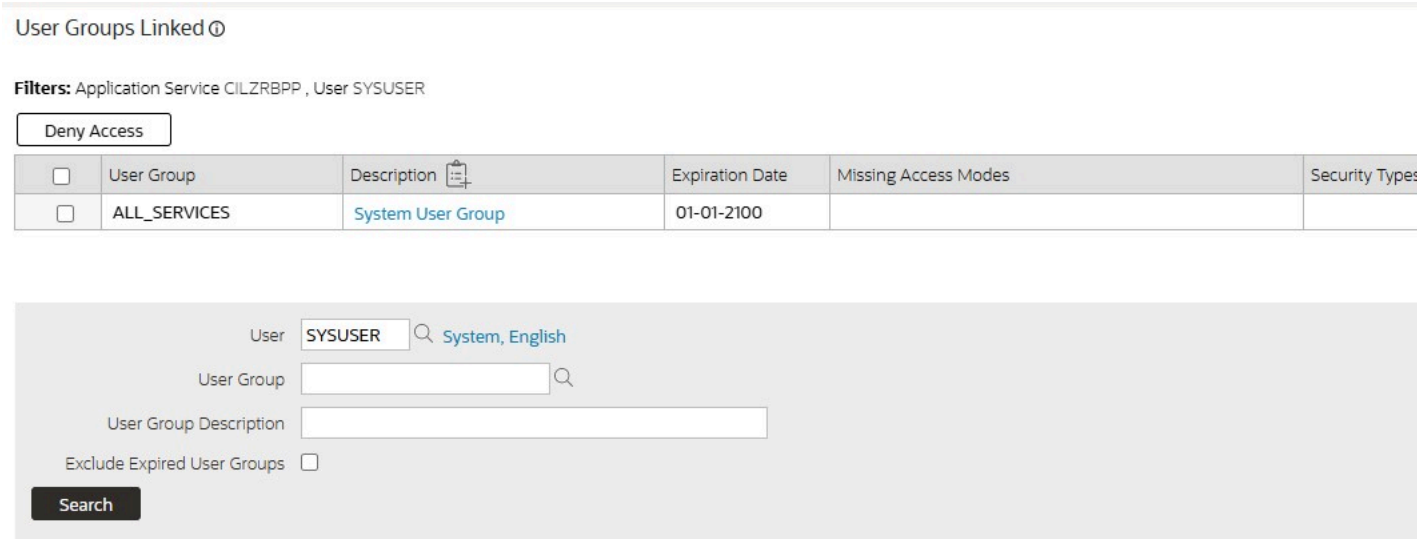
For query zones, the Search Criteria Area (also called Filter Area) contains the criteria used to find objects. The design of the zone controls the number and type of filters that appear in this area. After search criteria is entered, clicking the **Search** button causes the system to look for records that match the criteria. The results are shown in the Results Area.

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The system automatically collapses the filter area to allow more space for displaying the results. At that time the **Expand Filters** button may be used to open the filter area to enter different criteria. When the filter area is expanded the **Hide Filters** button may be used to collapse the filter area again without performing a new search.

For info zones, the zone's configuration indicates whether or not a Filter area is applicable and if so, whether or not it is open or closed by default. If the filter area is configured, the Show Filter icon is visible in the zone header. Click this icon to expose the Filter Area, if it is not visible and click the icon to hide the Filter Area if desired. Use this area to filter the information that appears in the zone by different values. Click the **Search** button to rebuild the Results Area using the specified filters.

For example, the following shows an info zone listing user groups that have access to a given Application Service where a filter area has been configured to allow users to refine the list by various criteria.



The info zone includes configuration to indicate whether the filter area, when exposed, should be shown at the top of the zone (above the results) or at the bottom of the zone (below the results). For query zones, the search criteria is always displayed at the top.

Description Bar

The Description Bar describes the search criteria that were used to build the Search Results Area.

Results Area

The Results Area displays the appropriate list of objects. For an info zone, this is the list of appropriate objects with any input filter criteria considered. The following is an example of the results for an info zone. For a query zone, this is the list that matches the search criteria defined in the Filter Area. The following is an example of the results set of an Info Zone.

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Business Objects with Status Reason

	Business Object	Description	Statuses
1	F1-BusinessFlagError	Business Flag Error	Discarded
2	F1-CubeView	Cube View	Active, Inac
3	F1-GenericBISyncRequest	Generic BI Sync Request	Discarded,
4	F1-MessageFromDevice	Message From Device	Canceled
5	F1-MessageToDevice	Message To Device	Queued, Ca
6	F1-MigrDataSetExport	Migration Data Set Export	Canceled
7	F1-MigrDataSetImport	Migration Data Set Import	Canceled, C

For a query zone, the columns that appear may differ depending on the search criteria. For example, if you search for a customer by their driver's license number, the resulting columns may be different than the ones displayed when you search by customer name.

The following points highlight details related to viewing and working with the result set:

- **Broadcast.** If the results set is configured to display a broadcast icon, , it means that at least one other zone on the portal is configured to display data related to the record selected in the results list. Clicking this icon will cause the other zone or zones to be built or refreshed to display related data.
- **Hypertext.** One or more columns in the zone may be configured as hypertext. Clicking the hypertext will result in navigating to another page to display data related to that column based on the configuration for that column.
- **Maximum height.** The maximum height of the report area is controlled by the zone's configuration. A vertical scroll will appear when more rows exist than fit into the height.
- **Maximum rows.** The maximum number of rows that can appear is controlled by the zone's configuration. Excess rows are truncated before display. Please note, you can configure the zone to export more rows than appear in the Results Area.
- **Control column sorting.** By default zones are designed to allow a user to sort the results list by clicking any column heading. Clicking once sorts ascending. Clicking again sorts descending. However, a zone may be configured to not allow this type of sorting.
- **Work list.** Columns may be configured to enable the work list icon, . Clicking this pushes all the data into the Work List zone.
- **Rearranging columns.** A zone may be configured to allow a user to rearrange columns and add or remove columns visible in the Result Area. Refer to Column Configuration for the details.

The type and variety of columns that appear in the Results Area is controlled by the zone's configuration.

Title Bar

The Title Bar contains the zone's description along with other icons and functions described in this section.

In the corner of the Title Bar, you will see an indicator that tells you whether the zone is collapsed or expanded. Each time you click the indicator, the zone toggles between expanded and collapsed. The following image shows a collapsed zone.

Bundle Entities

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Note: Recommendation: For zones that are configured to show on portal preferences, set up Portal Preferences to collapse zones that aren't needed every time a portal is displayed. Rationale: The system doesn't build collapsed zones when a portal is displayed. Instead, collapsed zones are only built when a user expands them. Thus, indicating a zone is collapsed improves response times.

If the zone is configured with help text, a help icon appears to the right of the zone title. Click this icon to view the help text.

The following sections describe additional icons and tools visible on the title bar. Note that in addition to the information described in this section, additional actions that are specific to a zone may appear based on configuration. The actions may appear in the form of hypertext, an icon or a button.

Explorer Zone Menu

Click the Explorer Zone Menu icon  to list available tools. The following topics describe each tool.

Clear Filters

Click the **Clear Filters** link in the Explorer Zone menu to clear the filter values and zone data.

Export Data

Click the **Export** link in the Explorer Zone menu to download the zone's data in csv format. This link is hidden if the zone has been configured to not download rows.

Please note the following with respect to this feature:

- Clicking export performs the search because it is possible to configure a number of records for download that differs from the number of records configured to display.
- Because the search is performed, you can request an export even without first searching on the zone. The filters populated (or not populated) at time of exporting are the ones used for the export. If the user did not search at all or did a search and then changed the filters and exported before searching again, the results in the export may not match what is visible on the zone.
- It is possible through zone configuration to mark columns that are visible to the user interface as suppressed in the export. Conversely, it's also possibly to mark columns as suppressed on the user interface but included in the export. As such, the columns visible in the export may not always match what is visible in the user interface. This applies when for zones that support configurable columns. Columns removed from view through this technique are still included in the export if not marked to suppress.
- If the column results include any HTML, the HTML is stripped out before exporting.

Print

Click the **Print Zone** link in the Explorer Zone menu to print the zone.

Save Search Options

Query zones and info zones that include filter areas, allow a user to capture and save filter criteria so that the same search can be more quickly executed in the future. Users may save many different search options for the same zone. Users also have the option to nominate one search as the default so that this search is automatically loaded upon entering the zone. In addition, users may choose to set one or more searches as a Favorite, which causes the search to appear in the Favorite Searches zone in the sidebar, as well as through the Menu on page 3. This allows a user to navigate to the portal for that zone and load the saved search in one click.

The Explorer Menu includes various options for supporting Saved Searches that are described below.

Note the following additional points about this functionality:

- **Click Search before Saving.** When a user wants to save a search, the search criteria should be entered and the **Search** button should be clicked prior to saving the search.
- **Criteria is saved, not results.** Although a user must click **Search** prior to saving the search, the system saves the criteria, but not the results. When returning to the query or info zone in the future and opening a given saved search, the results displayed will be the current records in the system that match the saved search criteria.

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- **Multi-Query Zones.** When a user is on a multi-query zone, the searches are saved at the multi-query zone level so that all saved searches for the various search dropdowns for a given multi-query zone are visible in the Open Saved Searches menu option.
- **Functionality is Secured.** If for any reason an implementation wishes to restrict which users are allowed to save searches, the functionality is securable. Only users with **Inquire** access to the **F1_USRFAVSCH** application service will see these options in the explorer menu. This is the same application service that is used to provide access to the Favorite Searches sidebar zone.

Save As

The **Save As...** option in the Explorer Zone menu allows a user to save the current entered search criteria. This should be clicked after executing the search.

The user is prompted to provide a name for the search. This search is now available from the Open Saved Searches option. If desired, a user can also choose to make this search the Default or may choose to Add to Favorites.

This option is visible whether or not an existing saved search is loaded. When a saved search is loaded, this option allows a user to make changes to the search criteria and save a new search with that criteria.

Open Saved Search

The **Open Saved Search...** option in the Explorer Zone menu is visible if there are any saved searches for the zone that is currently visible. Select this menu entry to view the current list of saved searches for the zone. For multi-query zones, any saved search for any of the query zones that are part of the multi-query zone are visible. Choose the desired saved search. The criteria is updated with this information and the search is performed.

Save

The **Save** option in the Explorer Zone menu is visible if a Saved Search is already loaded. This option allows a user to save changes to the criteria of an existing saved search (overwriting the previously saved criteria).

Set As Default

The **Set As Default** option in the Explorer Zone menu is only visible if a saved search is loaded and it is not currently the default. Click this option to nominate this search to be the one that is loaded when navigating to this zone from the menu.

Remove As Default

The **Remove As Default** option in the Explorer Zone menu is only visible if a saved search is loaded and it is currently the default. Click this option to no longer load this search automatically when navigating to this zone from the menu.

Add To Favorites

The **Add To Favorites** option in the Explorer Zone menu is only visible if a saved search is loaded and it is not currently included in the favorite searches zone. Click this option to include this search in the Favorite Searches zone. Once a search is in the Favorite Searches zone, you can use the link to the search in the sidebar to navigate to the portal for this zone and load the saved search in one click.

Note: Not available for dependent zones There are some portals that include a zone that is not the main query or info zone on the portal, but is rather a zone providing additional information for a record that is displayed. If a zone like this has filter options or configurable columns, a user is able to save searches and mark one as a default, but will not be able to add the saved search to favorites because the zone is dependent on other data on the page that is not captured for the individual zone.

Note: Sidebar Zone Preferences. Be sure that your portal preferences are configured to include the Favorite Searches sidebar zone.

Remove From Favorites

The **Remove From Favorites** option in the Explorer Zone menu is only visible if a saved search is loaded and it is currently included in the Favorite Searches zone. Click this option when you want to keep the saved search but you no longer want it visible in your Favorite Searches zone. (Deleting a saved search that is also marked as a favorite will automatically remove the search from the favorite searches zone.)

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Delete

The **Delete** option in the Explorer Zone menu is only visible if a saved search is loaded. Click this option to remove the currently opened saved search from the list of saved searches.

Note that if the saved search had been configured as favorite, deleting the saved search remove it from the favorite searches zone.

Show Filters

Click the **Show Filters** icon  to show the Filter Area. This button only appears if the zone has been configured to have filters.

Note: If the zone is configured to have filters and the drag and drop (column configuration) area, only one or the other is shown at any given time. It means that a user can either change the filter criteria and refresh the search results or change the column configuration and refresh the results.

Show Column Configuration Area

Click the **Column Configuration** icon  to show the Column Configuration Area. This button only appears if the zone has been configured to allow columns to be dragged and dropped into the Results Area.

Note: If the zone is configured to have filters and the drag and drop (column configuration) area, only one or the other is shown at any given time. It means that a user can either change the filter criteria and refresh the search results or change the column configuration and refresh the results.

The Open Zone Maintenance Icon

Click the **Go To Zone** icon  to switch to the zone's zone maintenance page. On this page, you can change the parameters that control the zone's behavior.

Note: Debug mode only. This icon only appears when the system operates in Debug mode.

Configurable Columns

Info zones and query zones may be configured to allow users to rearrange columns and to remove or add columns to the output. This is also referred to as "drag and drop" of columns.

When a zones is configured to support this functionality, the Show Column Configuration Area icon is visible in the zone title area. Click this icon to expose the Column Configuration Area, if it is not visible and click the icon to hide the Column Configuration Area if desired.

If configurable columns are allowed, a user may rearrange the order of columns currently displayed in the Results Area by clicking the column heading and "dragging" it to the desired location.

In addition, the column configuration area may display columns that are not currently in the Results Area. These are indicated by a color cream background. A user can drag one of these columns to the results area and then click **Refresh** to rebuild the zone.

To remove a column that is currently in the results area, click the trash can icon next to the column name in the column configuration area and then click **Refresh** to rebuild the zone.

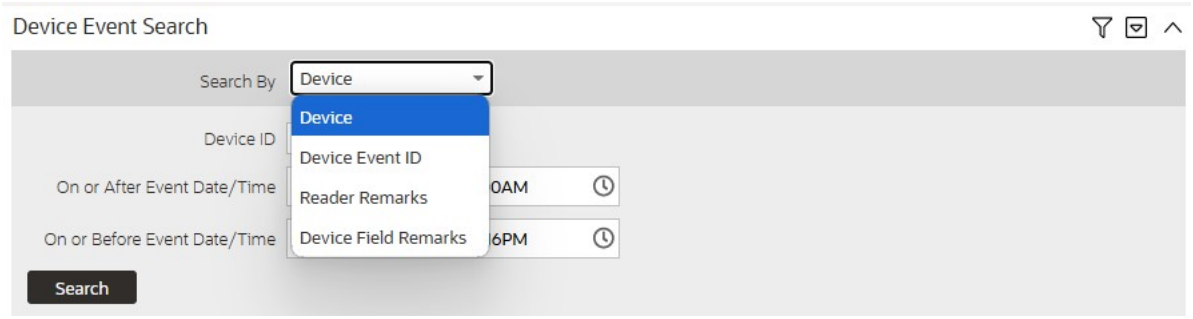
The following is an example of how the Column Configuration Area looks:

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Multi-Query Zones

This type of zone combines individual Query Zones into a single query zone. A **Search By** dropdown, built from the zone descriptions of the individual Query Zones, allows you to select the desired query to execute. Selecting a specific Query Zone display the filters of that query in the filter area. At this point the zone simply executes the selected Query Zone, as if it was executed on a standalone zone. By default, the first query zone option is selected.

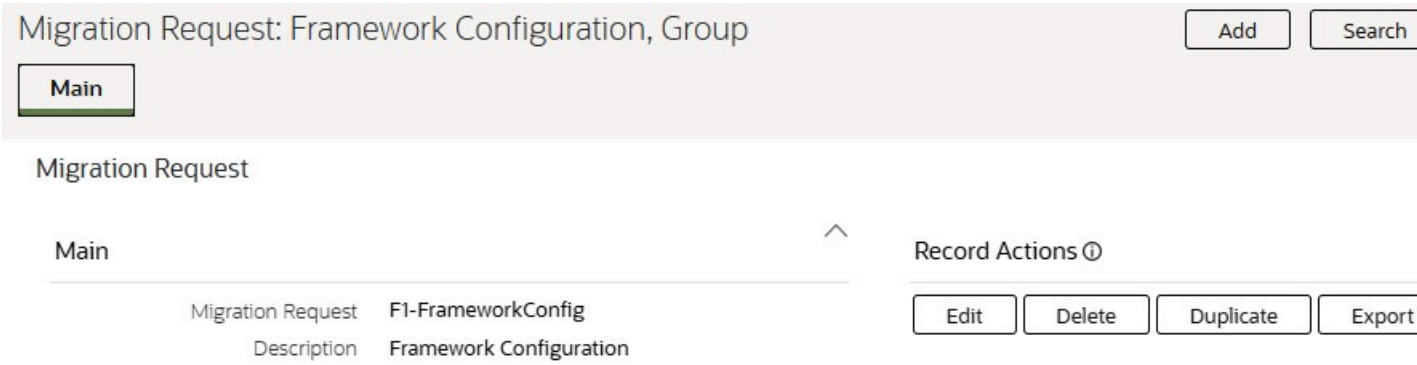


Map Zones

A map zone displays information related to one or more objects. For objects that are maintained using portal-based pages, the standard display of the object is using a map zone. Map zones may be configured to display an explicit map or may dynamically display the map based on the configuration of the record being displayed.

Because the information displayed in a map zone is configured using HTML, virtually any format supported by HTML is possible. The following is an example of a typical map zone used to display information about an object.

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A tool tip can be used to display additional help information for the details shown in a map zone. The tool tip may appear adjacent to the section header or adjacent to individual elements on a map.

Note: You can customize the help icon or disable map help using the Custom Look and Feel feature configuration.

Open Map Maintenance Icon

Click the **Go To Map** icon to switch to the UI map maintenance page. On this page, you can view the HTML configuration for the zone. Note that for map zones that display a business object configured without a map, the elements displayed are automatically rendered. In this case, no icon is visible.

Note: Debug mode only. This icon only appears when the system operates in Debug mode.

Tabbed Display Zones

This type of zone combines individual map zones into a single zone, allowing for complex of information to be organized and displayed in different tabs.

Tab labels are built from the zone descriptions of the individual zones and become the zone's title. Selecting a specific tab displays the information managed by the underlying zone. By default, the first tab is selected.

Timeline Zone

A timeline zone is used to show events over time for multiple types of data. This type of zone is helpful for providing a consolidated view of separate events occurring in time that may in fact impact each other. For example, in the billing system, a timeline can show bills, payments and collection processes for the same time period.

The topics in this section describe the functionality available in timeline zones.

Timelines Zones Are Configured By Your Implementation Team

The product provides support for creating timeline zones. However, whether timeline zones are configured for your implementation and on which portals they may be visible will depend on your specific configuration. Refer to

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Configuring Timeline Zones for general information about configuring timeline zones. Refer to your specific edge application's documentation for details about what type of timeline information is provided out of the box.

You Can Move Through Time

You can click the controls at the top of a timeline zone to change the date-range of the zone's information. To reposition the timeline to a specific date, selected the desired month and year at the top of the zone and click the search arrow.

Controls at the top right of the zone allow you to navigate through time.

- To go back one year, click the double-left arrow.
- To go back one month, click the single-left arrow.
- To go to today, click the middle dot.
- To go forward one month, click the single-right arrow.
- To go forward one year, click the double-right arrow.

Timelines Can Have Many Lines

Depending on how a timeline zone is configured, it will typically have one or more "lines" that show when significant events have occurred. Each line represents a specific type of data. The data may be related to a specific maintenance object, for example, payments may be displayed in one line and bills in another. It may also be possible to create multiple lines for different types of records for the same maintenance object. For example, if your product provides an algorithm to display cases, it may support defining a different entry for each case type.

Each Line Shows Events

Each line on a timeline may contain zero or more events where each event shows the date when the event occurs. For example, the payment line in a timeline has a separate event for every payment received from the customer. Each line's description contains the number of events on the line.

CAUTION:

If a line has more events than can fit onto a timeline, the line will show the first "chunk" of events and a message will appear in the "more info area" explaining that some events have been truncated. If this happens and the truncated events are in a later period, you can reposition the timeline's base period to show the truncated events.

Hovering Over An Event Shows the Event Information

When you hover over an event's date icon, a pop-up widow appears showing details of the event. The following information may appear:

- The event date.
- The event "hover text". Typically the standard information string is shown for each event.
- The event's common "information string" appears. This information is hypertext to allow for easy access to the transaction on which the object is maintained.
- Additional information may appear. This is dependent on the particular timeline algorithm. Refer to each timeline algorithm's description to find out if additional information appears in the pop-up area under any conditions.
- If the algorithm has configured BPA scripts that can be executed to perform business processes on the object, the BPA script description appears prefixed with a "wizard's hat" icon.

Common Base Portals and Zones

The following sections describe common standards followed by the product for base query and maintenance dialogue.

All-In-One Portal

The all-in-one portal is used for low volume objects, where a small number of records are expected.

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For example, many control tables use this style of portal. In this portal, rather than separate query and maintenance portals, a single portal allows a user to find a record and maintain the record. A zone listing all existing records is displayed when first entering the portal. A user can perform actions on existing records or add new records from there. More details about the list zone are provided below.

Refer to Maintenance Portal for information about zones commonly found on maintenance portals.

The all-in-one portal will typically provide the ability to add a new record. This may be a button in the Page Action area or a hyperlink defined directly on the list zone's header area.

List Zone

This info zone appears when first entering the portal and displays a row for each record.

The following functions are commonly available in a list zone:

- A broadcast icon is included in each row. Clicking this icon opens other zones that contain more information about the adjacent record.
- An **Edit** icon may be included in each row. Clicking this icon launches the maintenance BPA script to modify the adjacent record.
- A **Duplicate** icon may be included in each row allowing the user to duplicate the adjacent record without having to first display the record.
- A **Delete** icon may be included in each row allowing the user to delete the adjacent record without having to first display the record.
- If the record has a simple BO lifecycle of **Active** and **Inactive**, the list zone may include a button to **Activate** or **Deactivate** the adjacent record.

Separate Query and Maintenance Portals

For high volume objects where more sophisticated search criteria is needed to find a particular record, separate portals are provided to search for the record and to maintain it.

The query portal contains a zone to search of the object that you wish to maintain. Additional information about the query portal's search zone is provided below. Clicking an appropriate record in the search results navigates to the object's stand-alone maintenance portal.

The query portal will typically provide the ability to add a new record. This may be a button in the Page Action area or a hyperlink defined directly on the list zone's header area.

Query Portal Search Zone

The query portal contains one zone used to search for the object.

The zone may be a standard query zone or may be a multi-query zone providing one or more ways to search for your record.

Once the search results are displayed, click on the hypertext for the desired record's information string to navigate to the stand-alone maintenance portal.

Maintenance Portal

A maintenance portal refers to a page that is used to view and maintain a specific record. These types of records are governed by a business object, which defines the user interface layout for both the display of the record and the add or update of the record.

An all-in-one portal is a type of maintenance portal where the maintenance zone is displayed once a record has been broadcast from the list zone. For the separate query and maintenance portal dialogue, the maintenance portal includes only zones relevant for the specific record selected.

Maintenance portals may have multiple tabs to display information relevant for the object. Often, if the object has a Log, the log is on a separate tab. (However, there may be some maintenance portals that include the log zone on the Main tab.)

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The stand-alone maintenance portal is typically configured with the ability to navigate back to the query portal using either a **Search** button in the Page Actions area or using a **Go To Search** hyperlink in the main zone's header area. The stand-alone maintenance portal may also include the ability to add a new record using an Add button in the Page Actions area. (If not, a new record can be added by navigating through the menu or by navigating to the query portal where an Add hyperlink may be found.)

The following sections describe zones that are common to portals used to maintain a record. Note that additional zones may exist for specific all-in-one portals or stand-alone maintenance portals based on the particular functionality. Refer to the documentation for each portal to understand the specific zones that are provided.

Object Display Zone

This is a zone that displays the object being maintained.

An object being displayed may or may not allow for actions or updates to be made. Typically there is a Record Actions section in the display area that presents the valid actions. Depending on the functionality, the actions may prompt the users to input values required for that action.

Log Zone

If the maintenance object for the record includes a status, it typically has a log that records important events in its lifecycle.

This log is shown in an info zone on the portal, either on the Main tab or on a separate Log tab. A link appears in the zone's title bar to allow the user to add a new manual log entry.

Process Flow

This portal is used to guide a user through the steps needed to complete a process flow. If the process flow type is configured to keep a record of a completed process flow then this portal may also be used to display the details of such record.

Refer to Understanding Process Flows for more information.

Each type of process flow is assumed to be configured with designated custom menu options that allows you to launch a new process flow of that type as well as review saved off and completed records. When reviewing existing process flow records, you are brought to a query portal with options for searching for a specific record. You may **Resume** a saved off but not yet finalized process flow or review a complete one.

The **Process Flow** zone on the portal's **Main** tab page assists the user in completing the process flow as well as displays the information captured on a completed process flow.

Fixed Pages

There are some pages in the system that are built using a fixed page metaphor. All user interfaces implemented in this way function in a similar manner. This section describes functionality to these types of pages.

Note: Not all pages in the application use this metaphor. The preferred metaphor for pages in the system is to use portal-based pages. For more information see Common Base Portals and Zones on page 41.

Maintenance Pages

Maintenance pages are used to maintain (add, change, etc.) the information in the system using a fixed page metaphor. This section focuses on functionality common to all maintenance pages using this metaphor.

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The Unique Identifier Area

Every object in the system must have a unique identifier. For some objects, typically administrative or control table data, the unique identifier is defined by the user creating the record. Other objects, typically master or transaction entities, the unique identifier is assigned by the system after the record is saved.

Where the identifier is displayed depends upon whether the ID is user-defined or system generated.

Pages displaying objects with a user defined identifier (such as To Do Type) typically display the identifier on the left along with a search button. For master and transaction tables, (such as To Do Entry) the unique identifier is typically found in the upper right corner of the screen along with a search button and is labeled as the entity's ID. In this case, if there is an information string associated with the object, it is displayed on the left.

If the object being maintained has an associated context menu, a Context Menu Button is displayed appear.

Confirmation & Error Messages

Whenever a database modification action is requested, the system first validates the data to be put on the database.

First, the system validates the information. If there are errors, the first error encountered is displayed in a window. In addition to the error message, the error window also contains the error number and the identities of the programs that detected the error. If you don't understand an error and you have to call product support, please supply them with this information.

If there are no errors, the system is modified.

Warning If Unsaved Changes Exist

If you make any changes to an object and you don't commit these changes to the database, the following warning appears: "You have unsaved changes that will be lost if you continue. Press OK to continue anyway."

If you want to commit the changes, click **Cancel**. You will then return to the page and can make further changes or press Save. If you want to discard your changes and transfer to the new page, click **OK**.

CAUTION: This warning is not displayed if you are working on a *new* object on a fixed page and you navigate to a different page. Information about new objects is preserved in memory in anticipation of your return to the page. For example, if you are in the middle of adding a new user and you want to quickly reference information on a different page, you will not receive the above warning because your information will be saved. If you use the back button to return to the user page, all of the information you were adding will be present and you can enter the rest of the new user's data.

Query Pages

Query pages are used to display record sets in the system. Most query pages function in a similar manner. This section focuses on functionality common to all of the system's query pages.

The Search Area

The upper right corner of the screen is almost always the identifier of the object associated with the search. In Oracle Utilities Customer Care and Billing for example, the unique identifier on the Account Financial History page is the Account ID.

To the right of the unique identifier is a Search button. This button is used to search for a different object than the one whose data is being displayed in the page.

If the object being displayed has an associated context menu, a Context Menu Button is displayed.

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User Preferences

The Preferences (or My Preferences) transaction and the User Maintenance transactions are the same except that with My Preferences, only the following items can be modified:

- Main Tab
  - Language
  - Display Profile
  - Time Zone
  - Email Address
  - Sidebar Width
  - Sidebar Location
  - Sidebar State
  - Home Page
  - To Do Summary Age Bar Parameters
- Bookmarks
  - All information can be modified
- Portal Preferences
  - All information can be modified
- Favorite Links
  - All information can be modified
- Favorite Scripts
  - All information can be modified

User - Main

This page lets you view or define user information and access settings.

To open the page, use one of the following navigation options:

- The **Admin** > **Security** > **User** > **Search** menu item.
- The **Menu** > **My Preferences** menu item.
- The **User Menu** > **Preferences** menu item in the application toolbar.

Note that some fields are only modifiable when the page is opened from the from the **Admin** menu.

Description of Page

Basic user identification information is viewed or set in the **First Name**, **Last Name**, **User ID**, and **Login ID** fields, all of which are modifiable only when the page is opened from the **Admin** menu. User and logon IDs must be unique. The Login ID is the ID that the user uses to log in to the system. The User ID is the ID that is used throughout the application when users are assigned to tasks or when the user ID is stamped on records when logging add or update actions.

Language defines the language in which the user's screen prompts and messages appear.

Set **User Enable** to allow the user to access the system.

> **Note:** This field, available only when the page is accessed through the **Admin** menu, provides special field-level security. A user can change the field only if the **Enable/Disable** access mode is set.

Display Profile defines the display options for the user.

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The following fields are related to defining a template user along with some configuration available for using a template user. This fields are modifiable only when the page is accessed through the **Admin** menu. Refer to template user for more information about these fields.

- Set **User Type** to **Template User** if the user is going to serve as a template user.
- If a user's portal preferences are to be inherited from a "template user", use the **Portals Profile User** to define the user ID of the template user.
- If a user's favorite links are to be inherited from a "template user", use the **Favorites Profile User** to define the user ID of the template user.

The **Time Zone** associated with the user may be defined. Implementations may use this information for features and functions where the user's time zone impacts display of data. Refer to Designing Time Zones for more information about the use of time zones.

Email Address captures the user's email address.

Sidebar Width defines the number of pixels to use for the user's sidebar area. A setting of 250 is recommended as a minimum. Depending on the width of a user's monitor, a higher setting (such as 250) will display more information without compromising the space on the main area of the application. Setting the value to 0 will suppress the sidebar. The width setting is updated in background to retain the value based on dynamic sizing.

Sidebar Location governs whether the sidebar appears before or after the main page area. If no value is specified, the default position of the sidebar is after the main page area.

Sidebar State indicates whether the sidebar is open or closed. The state is updated in background to retain the value based on dynamic opening or closing of the sidebar.

Home Page defines the page that appears when the user starts a session or clicks the Home link. Access to the home page is also available from the menu.

The To Do entry fields control how To Do entries are aged in respect of the "age bars" that appear on To Do Summary, To Do Supervisor Summary and the To Do Summary Sidebar Zone.

- Use **Lower Age Limit for Yellow Bar** to define the number of days old a To Do entry must be to be considered "yellow" in the age bar. To Do entries below this limit are considered "green" in the age bar.
- Use **Upper Age Limit for Yellow Bar** is the high limit for the "yellow" bar. To Do entries older than this are considered "red" in the age bar.

The **User Group** collection defines the group(s) with which the user is associated and the date (if any) when the user's association expires. This feature is modifiable only when the page is accessed through the **Admin** menu. For more information, see The Big Picture Of Application Security. Assignments of users in a user group can also be established or maintained through the User Group page.

> **Note:** The ability to maintain the user groups on this page requires special field-level security. A user can change the field only if the **System Administration** access mode is set.

If your implementation has configured Object Erasure for the User maintenance object, the **Object Erasure Schedule** sidebar zone is visible displaying the erasure status for this user record, if applicable. Refer to Erasing User Information by Obfuscation for more information on object erasure for User records.

User - To Do Roles

Open the User page and then navigate to the **To Do Roles** tab to define the To Do roles assigned to the user.

The information on this page cannot be modified if accessed through **My Preferences**.

> **Fastpath:** A user's To Do roles control the types of **To Do** entries the user can access. For additional information on To Do roles, see To Do Entries Reference A Role.

Description of Page

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The grid contains the user's To Do roles. To modify a To Do role linked to the user, simply move to a field and change its value. To remove a To Do role, click the - (minus) button. To add a new To Do role, click the + (plus) button and enter the role.

Where Used

Every **To Do** entry references a role. A To Do role has one or more users (and a user may belong to many To Do roles). Users who are part of the To Do role assigned to a To Do entry may work on the To Do entry. For more information on this feature, see The Big Picture Of To Do Lists.

User - Access Security

Open the User page and then navigate to the **Access Security** tab to define a user's security rights. You cannot modify this page if you accessed it through **My Preferences**.

Fastpath: Refer to The Big Picture of Application Security for more information about data access roles and access groups.

Description of Page

Use the **Default Access Group** to define the access group that is defaulted on new records added by this user that are subject to row security.

The scroll area contains the **Data Access Roles** to which this user belongs. A user's data access roles play a part in determining the accounts whose data they can access.

To add additional data access roles to this user, click the + button and specify the following:

Enter the **Data Access Role**. Keep in mind that when you add a **Data Access Role** to a **User**, you are granting this user access to all of the accounts linked to the data access role's access groups.

Use **Expiration Date** to define when the user's membership in this data access role expires.

Note: You can also use Data Access Role - Main to maintain a data access role's users.

The tree highlights the **Access Groups** to which the above **Data Access Roles** provide access.

User - Bookmarks

This page is used to manage a user's bookmarks that are created when a user clicks the Bookmark button and saves a bookmark. From this page the user can delete a bookmark, change the name of the bookmark or change the sort sequence.

Open the User page and then navigate to the **Bookmarks** tab to modify or delete a bookmark.

Description of Page

Sequence is the sort sequence associated with the bookmark. Bookmarks with the same sequence are then sorted alphabetically.

Name is the user-defined name assigned to the bookmark. This is the text that is visible in the Bookmarks sidebar zone.

Note: Favorite Links vs. Bookmarks. Favorite links are configured through the user page and define pages that a user can navigate to. They do not define context (although some pages may use information currently in global context when navigating). Some users may not be allowed to configure their own favorite links and would see the favorite links associated with a profile user. Bookmarks are created using a bookmark button available on each page. The bookmark saves navigation information, context information and also captures some information about the state of a page. Bookmarks are not governed by any user profile configuration.

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User - Portal Preferences

The base product contains several portals that allow users to customize them via portal preferences. Portal preferences allow users to control:

- Which zones appear on the portal
- The order in which the zones appear
- Whether the zones should be "collapsed" (i.e., minimized) when the portal opens.

Note: You may not be able to change your portal preferences. If a note appears immediately before the list of portals, a system administrator has configured your user ID to reference a **Portals Profile User** (this is defined on the **Main** tab). Preferences set in this way cannot be modified. System administrators do this in order to enforce a common look-and-feel throughout the user community.

Open the User page and then navigate to the **Portal Preferences** tab to modify a user's preferences.

Description of Page

The accordion contains a row for every portal configured to show on user preferences and to which you have access. To change how a portal's zones appear, expand the respective row and change the elements accordingly. The remainder of this section describes how you can configure how a portal's zones appear.

Zone lists all of the zones in the portal.

Place a check under **Display** if the zone should be displayed on the portal.

Place a check under **Initially Collapsed** if the zone should be minimized when the portal is initially opened. Setting zones as initially collapsed is a good idea to save space and to help pages to load more quickly. Refer to Zones May Appear Collapsed When A Page Opens for more information.

CAUTION: Recommendation. It is recommended that you set your preferences to collapse zones that you don't use often. This is because the system doesn't perform the processing necessary to build collapsed zones until you ask to expand a zone. Opening a page with zones collapsed accelerates the response times of portal.

Use **Sequence** to control the position of the zone in respect of the other zones. This field is disabled if **Display** is not checked. Duplicate **Sequence** numbers are allowed.

For zones displaying data that is changing often, use **Refresh Seconds** to define in seconds how often the zone is refreshed. The minimum valid value is 15. The maximum valid value is 3600 (1 hour). A value of 0 indicates no automatic refresh.

Security Access indicates whether the user has access rights to a zone. Refer to Granting Access To Zones for more information.

User - Favorite Links

This page is used to define a user's favorite transactions and URLs. Each such link appears as an entry in the Favorite Links Zone in the Sidebar Portal on page 28, as well as through the Menu on page 3.

Note: A hot key can be used to execute a favorite link. Rather than clicking a button in the favorite links zone, you can invoke your first nine favorite links by pressing `Ctrl` + a number (where the number corresponds with the relative position of the transaction in your list of favorites). Note that the numeric keypad on your keyboard cannot be used to implement this function.

Open the User page and then navigate to the **Favorite Links** tab to modify a user's favorite links.

Description of Page

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Note: You may not be able to change your favorite links. If a **Note** appears beneath your **User ID**, your user id has been setup to reference a specific **Favorites Profile User** as defined on the **Main** tab. If a system administrator has setup your user ID in this way, your preferences may not be changed. System administrators may apply this feature in order to enforce a common look-and-feel throughout the user community.

Each row references a Navigation Option. The navigation options supplied with the base package correspond with the system's menu items. This means you can setup a favorite link to open any transaction in the system (in either **add** or **update** mode).

Note: Favorite links can point to other places. The navigation options supplied with the base package always open a transaction's **Main** tab. If you find yourself continually accessing a different tab page, you can have your implementation team create a new navigation option that references the desired tab page. Once this navigation option is set up, you can reference it as one of your favorite links. In addition, it's also possible for your implementation team to setup navigation options that open a URL outside of the system. For example, your implementation team could setup a navigation option to a credit rating company's website. Once this navigation option is set up, you can reference it as one of your favorite links.

Use a **Sequence** to control the order in which the navigation option appears in the Favorite Links Zone.

Security Access indicates if you have been given security rights to the respective transaction. Refer to The Big Picture Of Application Security for more information.

Note: Favorite Links vs. Bookmarks. Favorite links are configured through the user page and define pages that a user can navigate to. They do not define context (although some pages may use information currently in global context when navigating). Some users may not be allowed to configure their own favorite links and would see the favorite links associated with a profile user. Bookmarks are created using a bookmark button available on each page. The bookmark saves navigation information, context information and also captures some information about the state of a page. Bookmarks are not governed by any user profile configuration.

User - Favorite Scripts

This page is used to define a user's favorite scripts. Each script is displayed in the Favorite Scripts Zone on page 31 in the Sidebar Portal on page 28, as well as through the Menu on page 3. Clicking the entry in the favorites can be used to initiate a script.

Note: A hot key can be used to execute a favorite script. Rather than selecting a script from the business process assistant search, you can invoke your first nine favorite scripts by pressing `Ctrl + Shift +` a number (where the number corresponds with the relative position of the script in your list of favorites). Note that the numeric keypad on your keyboard cannot be used to implement this function.

Open the User page and then navigate to the **Favorite Scripts** tab to modify a user’s Favorite Scripts.

Description of Page

Note: You may not be able to change your favorite scripts. If a **Note** is displayed on top of the grid, your user id has been setup to reference a specific **Favorites Profile User** as defined on the **Main** tab. If a system administrator has setup your user ID in this way, your preferences may not be changed. System administrators may apply this feature in order to enforce a common look-and-feel throughout the user community.

Each row in the grid contains one of your favorite **Scripts**.

Use the **Sort Sequence** to control the order in which the scripts appear in the zone.

Security Access indicates whether you have access to the script's application service. Refer to The Big Picture Of Application Security for more information.

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User - Characteristics

Select **Admin** > **Security** > **User** > **Search** and navigate to the **Characteristics** tab to define characteristic values for the user. You cannot modify this page if you accessed it through My Preferences.

Description of Page

Use the characteristics grid to capture additional information about the user.

You can only choose **Characteristic Types** defined as permissible for the user record. Refer to Setting Up Characteristic Types & Their Values for more information.

Enter a valid **Characteristic Value** for the selected characteristic type. You may enter more than one characteristic row for the same characteristic type, each associated with a unique **Sequence** number. If not specified, the system defaults it to the next sequence number for the characteristic type.

User - Miscellaneous

Select **Admin** > **Security** > **User** > **Search** and navigate to the **Miscellaneous** tab to view additional information associated with a user.

User Id, First Name and Last Name are displayed. Depending on your implementation, additional zones may appear on the User Portal

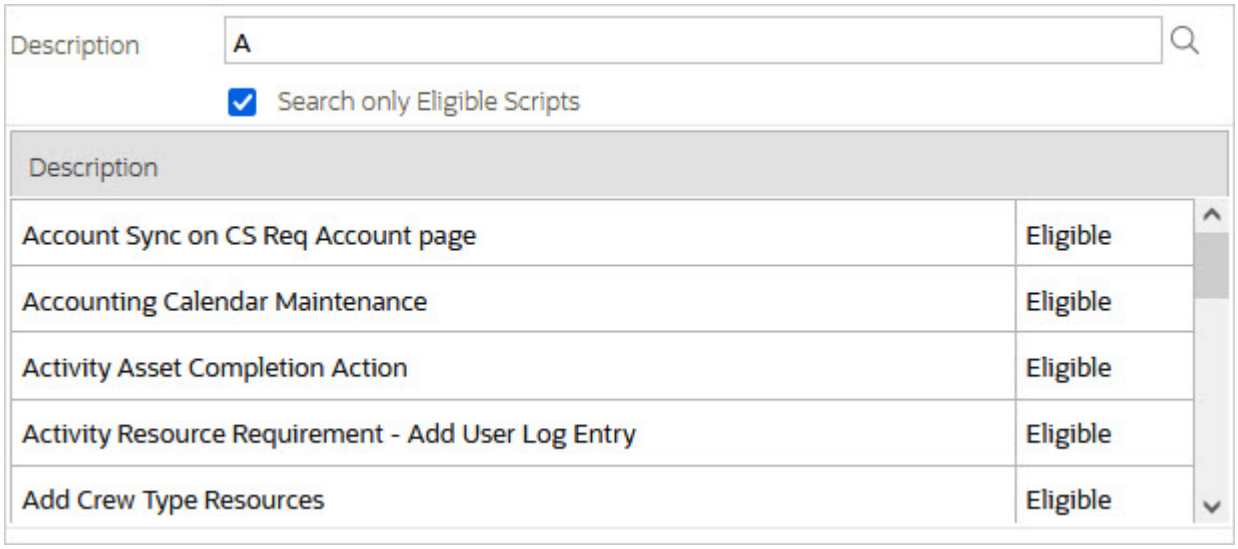
If additional zones appear, use the embedded help for information about the fields managed on the zone.

Initiating Scripts

Your implementation team can set up business process assistant (BPA) scripts to walk you through business processes. Once scripts have been set up, you can initiate a script using any of the following methods:

- You can define a list of your "favorite scripts" on your user preferences. You can then invoke any of the scripts from the Favorite Scripts zone on the sidebar. You can also invoke any of your first 9 favorites by pressing `Ctrl + Shift +` a number (where the number corresponds with the relative position of the script in your list of favorites). For example, if you press `Ctrl+Shift+2` and you've setup your "favorite scripts" to be **Start Autopay** and **Stop sending marketing information**; the **Stop receiving marketing information** script is invoked. Note that the numeric keypad on your keyboard cannot be used to implement this function.
- You can configure a menu item to launch a script by referencing a navigation option that is a **script** navigation option type.
- The system creates To Do entries to highlight tasks that require attention (e.g., bills in errors, accounts without bill cycles, etc.). Users can complete many of these tasks without assistance. However, you can set up the system to automatically launch a script when a user selects a To Do entry. For example, consider a To Do entry that highlights a bill that's in error due to an invalid mailing address. You can set up the system to execute a script when this To Do entry is selected. This script might prompt the user to first correct the customer's default mailing address and then re-complete the bill. Refer to Executing A Script When A To Do Is Launched for more information.
- You can indicate that a script should be launched upon entering the system. This functionality enables an external system to launch the system and immediately launch a script.
- The following hot keys cause an interactive menu to be displayed:
  - `Ctrl+Alt+Q`
  - `Ctrl+Shift+S`

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The menu allows you to search for a script using any word in its description. Note, if you've turned on **Search only Eligible Scripts**, your search is limited to eligible scripts. Note, the system displays an indication if each script in the grid is **Eligible** or **Ineligible** in this section.

You can initiate a script from this area by clicking on it.

When a script is initiated, this menu closes and the object display area shifts down to make room for the script area.

Note: Securing scripts. Only scripts the user is allowed to execute are displayed. Refer to Securing Script Execution for more information.

Note: Customize the script area. Using the Height step type, an individual script may be configured to use more or less of the script area than the standard script area. It is also possible to configure a script to hide the script area altogether.

The information in the script area takes you through the steps in the selected business process (note, your implementation team controls the information that appears in the script area).

The following points highlight useful information common to all scripts:

- **Return focus to script area.** Often during a script the focus moves from the script area to another section of the page. For example, you might be required to fill in data for a new record being added. When you are ready to return to the script area, rather than using the mouse to return to the area, you can press `Ctrl+Shift+F`. The focus returns you to either the first available input field or to a "default" button if no input field is available.
- **The Continue button.** Many steps in a script ask you to click the **Continue** button when you're ready to restart a script. For example, a step may ask you to confirm a customer's automatic payment information and then click **Continue** when you're ready for the script to restart. Rather than using the mouse to click this button, you can press `Ctrl+Shift+C`.
- **Selected button changes color.** When you click a button in the script area, the button selected changes color so that you can easily see which option you selected.

Fastpath: Refer to The Big Picture Of Scripts for more information about scripts.

Note: You can abort a script at any time by clicking the red X button in the upper right corner of the script area (or by pressing `Ctrl+Shift+X`).

Shortcut Key Summary

The following table summarizes the keyboard shortcuts (hot keys) available in the system:

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Note: It is possible that your specific product supports additional shortcut keys. Refer to your product documentation for more information.

Note: It is possible that some of the following system accelerator keys may duplicate shortcuts, or hot keys, that are predefined within your browser. If this is the case, the browser's functionality commonly takes precedence.

Note: It is possible that your implementation uses one of the accelerator keys listed below for a different purpose. For example, in some languages, a shortcut key may be used for a special character in the alphabet not included on all keyboards. It is possible to turn off any of the Alt+letter shortcuts and Ctrl+Alt+letter shortcuts listed below using a properties file entry. The property is **ouaf.shortcut.ignore.altKeys=** where one or more letters may be entered separated by a comma. When setting this property, the system automatically enables a 'potential alternate key' for certain functions (see the table below). Refer to the *Server Administration Guide* for more information about the property.

Accelerator Key	Potential Alternate Key (see Note above)	Function
Alt+B		Returns to the previous page on which you were working. This is the equivalent of clicking the Back on page 5 arrow.
Ctrl+Alt+B		Launches the Bookmark dialog. This is the equivalent of clicking the Bookmark button.
Alt+C,Ctrl+Alt+C, Alt+Shift+C		Clears the currently displayed object from the page. This is the equivalent of clicking the Clear button.
Ctrl+Shift+C		If the current step in the Script area has a **Continue** button, this shortcut is equivalent to clicking **Continue**.
Ctrl+Alt+D, Alt+D		Creates a duplicate of the object being displayed. Equivalent to clicking the Duplicate button.
Ctrl+Alt+F		Positions the user's cursor to the Search input field.
Ctrl+Shift+F		If the Script area is open and you are working on a different area of the page, this key returns focus to the script area. Focus returns to either the first available input field or to a "default" button if no input field is available.
Alt+G		Returns to the most recent page that was displayed when the Back arrow was clicked. Equivalent to clicking the Forward arrow.
Alt+J		Minimizes the sidebar. It also expands the sidebar, if it was minimized.
Alt+K		Transfers you to To Do Entry - Main for the current item in the To Do list. Pressing Alt+K while on this page takes you to the first To Do entry on the list.
Ctrl+Alt+L		Logs the user out of the system. This is equivalent to clicking the Logout menu item.
Ctrl+Alt+M		Opens the Menu.
Alt+N	Alt+Shift+N	Displays the next entry in the search results. Equivalent to clicking Next Item.
Alt+O	Alt+Shift+O	Navigates to the user's home page. Equivalent to clicking the Home icon.
Ctrl+Alt+P		Opens your User Preferences page. Equivalent to clicking the Preferences menu item.

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Accelerator Key	Potential Alternate Key (see Note above)	Function
Alt+P		Displays the previous entry in the search results. Equivalent to clicking Previous Item.
Ctrl+Alt+Q		Opens the business process assistant, where you can select a script that walks you through a business process.
Alt+RCtrl+Alt +R		Refreshes the page with the last saved version of the object being displayed in the page. Equivalent to clicking the Refresh button.
Alt+S	Alt+Shift+S	Saves any changes that you've made on the database. Equivalent to clicking the Save button.
Ctrl+Shift+S		Opens the business process assistant, where you can select a script that walks you through a business process.
Alt+X	Alt+Shift+X	Opens the To Do Summary.
Ctrl+Shift+X, Ctrl+Shift+Z		If the Script area is open, equivalent to clicking the **Close** button in the script area. If a pop-up window is open, this closes the window.
Alt+Y		Displays the previous item in the To Do list. Equivalent to clicking the **Previous** button in the Current To Do zone.
Alt+Z	Alt+Shift+Z	Displays the next item in the To Do list. Equivalent to clicking the **Next** button in the Current To Do zone.
Alt+Insert		Inserts a new row into an editable grid if the insertion point is in the grid. Equivalent to clicking the **Insert** button.
Alt+Delete		Removes a row from an editable grid if the insertion point is in the grid. Equivalent to clicking the **Delete** button.
Alt+[		Navigates to the next main page component area of the application. Refer to Page Components for the list of the main page components. Using Shift+Alt+[reverses the sequence of navigation.
Alt+]		Navigates to the next zone. When you are on a portal with zones, this key brings you to the next zone in the portal. If you are on the last zone in the portal, the key brings you to the first zone on the sidebar, if visible. Keying through all the zones on the sidebar brings you to the first zone on the portal displayed in the main area. If the page displayed is a fixed page rather than a portal, this key will only navigate within the sidebar. Using Shift+Alt+] brings you to the previous zone.
Alt+F1		Invokes online Help for the application. Equivalent to clicking the Help entry in the Help menu.
Alt+1 ...Alt+9, Alt+0		These keys are only applicable when a page / portal with multiple tabs is open. The shortcuts open the tab page whose relative position corresponds with the shortcut number. For example, if you press Alt +3 on a page with multiple tabs, the third tab is displayed. Alt+0 navigates to the 10th tab. If there are more than ten tabs on a page, you must use the mouse or F2/Shift+F2 to display additional tabs. Note that you cannot use the numeric keypad for these shortcuts.
Ctrl+1 ...Ctrl+9		Invokes the favorite link whose relative position corresponds with the shortcut number. For example, if you press Ctrl+3, the transaction for your third "favorite link" is invoked. Note that you cannot use the numeric keypad for these shortcuts.

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Accelerator Key	Potential Alternate Key (see Note above)	Function
`Ctrl+Shift+1` ... `Ctrl+Shift+9`		Invokes the favorite script whose relative position corresponds with the shortcut number. For example, pressing Ctrl+Shift+2 selects the second of your "favorite scripts". The numeric keypad cannot be used for these shortcuts.
`Alt+left arrow`		Populates a scroll area with the previous entry. Equivalent to clicking the scroll control .
`Alt+right arrow`		Populates a scroll area with the next entry. Equivalent to clicking the scroll control .
`Enter` when in a field with an adjacent Search button		Invokes the search. Equivalent to clicking the Search Button.
`Enter` when a row in a search result grid is highlighted		Selects the item and closes the search. Note that after selecting an item from the search results, you can press Alt+N or Alt+P to scroll up or down through other items in the result grid without returning to the search results.
`Enter` when a menu item is highlighted		Selects the menu item.
`Enter` when the insertion point is within a tree node		Equivalent to clicking on the item in the tree: • If the insertion point is on a node image, the node is either expanded or collapsed, dependant on its current state. • If the insertion point is on a context menu, the context menu is opened and normal menu processing applies. • If the insertion point is on a "link" element, normal navigation processing occurs.
`Tab` when a row in a search result is highlighted		Highlights the next row.
`Shift + Tab` when a row in a search result is highlighted		Highlights the previous row.
`Space` when the insertion point is on a button		Equivalent to pressing the button.
`Space` when the insertion point is in a date/time field		Opens the date/time selection window.
`Space` when the insertion point is in a check box		Toggles the check box between checked and unchecked.
`Page Up` while in a list grid		Scrolls the contents of the list grid up approximately one page.
`Page Down` while in a list grid		Scrolls the contents of the list grid down approximately one page.

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Accelerator Key	Potential Alternate Key (see Note above)	Function
`Up or Down Arrow` when in a dropdown list		Moves to the next or previous value in the list. You can also press a letter key to locate the next value starting with that letter.
`Up or Down Arrow` keys when in search results		Highlights the next/previous row in search results.
`Up, Down, Left or Right Arrow` when using a menu		Highlights other menu items.
`Esc` when using a menu		Closes the menu.
`Alt+F2`		Opens the next tab page when viewing a page / portal with multiple tabs.
`Shift+Alt+F2`		Opens the previous tab page when viewing a page / portal with multiple tabs.

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Chapter 2

To Do Processing

Topics:

- Understanding To Do Processing
- Managing To Do Entries

There are numerous events that trigger the creation of email-like messages describing work that requires human attention. For example, if a bill segment has an error, a message is created to highlight such. We refer to each message as a **To Do Entry**. In this section, we describe how to view, manage and work To Do entries.

Fastpath: We recommend familiarizing yourself with the topics described in The Big Picture of To Do Lists to fully appreciate how To Do entries are managed by the system.

Understanding To Do Processing

The topics in this section provide background information on To Do processing functionality.

To Do Role

Each To Do entry is assigned a specific To Do Role. The role defines the users who may work on the entry. The permissible roles that may be assigned to a To Do entry are defined on the entry's To Do type. One or more users within a role may be designated as a supervisor, who is allowed to assign To Do entries to other people. Supervisors are determined through application security access.

Refer to To Do Entries Reference A Role to learn more about role assignment.

After an entry is created, its role may be changed to any role defined as valid for the entry's To Do type. Manual changes of a To Do entry's role are recorded on the To Do entry log.

To Do Priority

A To Do entry is associated with a priority level representing its processing order compared to other entries. Refer to The Priority Of A To Do Entry for more information on how an entry's priority is initially assigned and how it may be automatically updated by the system.

A user may manually override a To Do entry's priority at any time. Once overridden, automatic recalculation of the priority is no longer performed so as not to override the value explicitly set by the user. Manual overrides of a To Do entry's priority are recorded on the To Do entry log.

Note: Only users that are currently **Assigned** to a To Do entry or ones that are valid for the role of an **Open** To Do entry may manually change the priority.

Work Distribution

This topic goes overs the various possible actions a user can take to adjust what role or what user is associated with a To Do entry while it is in a non-complete state.

Adjusting the Role

A To Do entry must always reference a role. When a To Do entry are created in the **Open** state and is associated with a role. The following points highlight ways to adjust the role associated with a To Do entry.

- A user viewing a record on the To Do Entry page may use the Forward or Send Back action to change the role.
- A supervisor using the To Do Search page may assign a user not linked to the current role. In this case, the system will update the role to one valid for the assignee.

Assigning a To Do to a User

There are several ways to **Assign** a To Do entry to a user:

- The To Do Management portal provides many filters and viewing options to review To Do entries for a give To Do Type. In addition, it displays a rich amount of detail for the resulting To Do entries, helping users to make decisions. Users may use this page to assign work to themselves and supervisors may use this to assign work to others.
- A supervisor can use the Supervisor Functions pages to review, assign and reassign To Dos to users.
- A user viewing an entry on the To Do Entry page may use the Forward to a User or the Send Back action to assign the entry to a different user.
- A user may use the To Do list pages to review and assign To Dos to themselves.
- All of the above assignment functions may also be performed using the To Do Search page.

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The system can also be configured to dynamically assign the highest priority work to users on demand whenever they are available for fixing errors.

> **Note: Assignment on demand is in a plug-in.** You can customize the next assignment plug-in on the installation options to follow your organization's work distribution rules. The product provides an algorithm out of the box (**F1-NEXT-TDNS**) that can assign work solely based on priority. Another algorithm (**F1-NEXT-TDSK**) may be used to only consider To Do entries the user has the proper skills to resolve. Your implementation may provide a different algorithm based on your own business rules.

One of the main benefits of the assignment on demand approach is that work is allocated real-time based on most current information such as skills, priority, user availability, etc. This also means that work remains unassigned until a user is actually going to work on it making it available to any qualified user.

Assignment "on demand" is possible from the Current To Do zone on the sidebar. Refer to this zone to learn about all the functions it provides.

Reopening / Unassigning a To Do

It is possible to transition a To Do entry from **Assigned** back to **Open**.

- A user viewing a record assigned to them on the To Do Entry page may use the Forward to a role action to move the entry back to **Open**.
- The **Unassign** button on the To Do Management portal or the **Reopen** button on the To Do Search page causes the To Do entry to go back to **Open**.

Working On A To Do

The To Do entry you are actively working on is your **In Progress** To Do entry. This To Do entry is visible in the Current To Do zone. Refer to that zone's help topic for all the features enabled on that zone.

> **Important:** The information here assumes that you have configured the system to use the ability to have a substatus of Assigned, which includes the **In Progress** value. If you are not taking advantage of the substatus, then see below for information about how the functionality described here works differently.

If you don't currently have an **In Progress** To Do entry, there are several ways to choose a To Do and indicate that you want to start working on it. Doing so proactively populates the To Do into the Current To Do zone and navigates you to the related object (or if the To Do type is configured to launch a script, the script is launched).

If your organization's practice is to assign work to users up front, then a typical approach is that you would start by reviewing a list of entries assigned to you using one of the base pages and indicate that you want to work on an entry in the list. Or your organization may allow you to review To Do entries that are open and in a role that you are in. In some pages, there is a way for you to enable a list of To Do Entries that you can work through without needing to return to the query page to get the next entry.

The following points highlight the available base pages and their supported functionality.

- To Do Management allows you to use filters to view a list of entries assigned to you or that are open. Click the Work List icon in the Action column to populate the Work List zone in the sidebar with the results of the search. Click the **Work** button to choose the To Do entry you wish to start with. This drills you into the related object and populates the Current To Do zone with this To Do. It marks the To Do **In Progress**. (If the To Do entry was not already assigned to you, it will first assign it to you). Use the entries in the Work List zone to subsequently work on other To Do entries.
- If you are viewing a record on To Do Entry on page 70 that you are allowed to work on, click the **Work** button to indicate that you want to start working on the record. This drills you into the related object and populates the Current To Do zone with this To Do. It marks the To Do **In Progress**. (If the To Do entry was not already assigned to you, it will first assign it to you).
- To Do List allows you to start working on a To Do by clicking the entry's message description link. It marks the To Do **In Progress**. (If the To Do entry was not already assigned to you, it will first assign it to you). Any other To Do entries that were in that results list on that page become an internal work list and the **Previous** button and **Next** button are enabled in the Current To Do zone to work through that list. Note that clicking the next or previous button

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does not automatically assign the entry to you. Use the **Start Progress** button on the Current To Do zone to change the status. If you don't start progress, it means the To Do in this zone is not your current In Progress to do entry. It remains in this zone until you perform another action to populate a different To Do in this zone. If you open another browser window, the Current To Do zone will not have this same To Do entry populated.

- To Do Search allows you to drill into the details of a To Do by clicking the entry's message description link, but it does not automatically assign it to you or update it to **In Progress**. You can click **Start Progress** on the Current To Do zone once it's populated. Any other To Do entries that were in that results list on that page become an internal work list and the **Previous** button and **Next** button are enabled in the Current To Do zone to work through that list. As with the first To Do selected, the subsequent To Do entries will not be assigned to you or progress started automatically.

> **Note:** The To Do Search works differently than other pages in that you can drill in on a To Do entry and push the details into the Current To Do zone even if the To Do entry is assigned to someone else or if you are not allowed to work on that To Do. If you have an **In Progress** To Do entry and use the To Do Search to drill in on a different To Do Entry that doesn't get assigned to you, that To Do is now the one in the Current To Do zone and remains there until you do something else to refresh the data in that zone. If you open another browser window, the Current To Do zone will not have this same To Do entry populated.

Refer to Current To Do for more information about actions available to update To Do entries that you are working on.

Additionally, you may have the option to click on the **Assign me a To Do** button on the Current To Do zone to request your next task. The returned To Do entry automatically becomes the your **In Progress** To Do. This does not enable any work list functionality.

> **Note:** If you do already have an **In Progress** To Do and you perform one of the above actions that results in a different To Do to become **In Progress**, the To Do entry that was already **In Progress** is updated to **On Hold**.

> **Important:** If your implementation is not taking advantage of the substatus as described in The Lifecycle Of A To Do Entry, then the system doesn't have a persistent way of marking which To Do entry is the one you are working on. You may still perform any of the steps described above to make the To Do entry your 'current' To Do. If any of the above steps indicate that the To Do will be assigned to you, that action still occurs, but the To Do entry is not moved to 'in progress'. The To Do entry is only considered the 'current To Do' for your current session. If a different session is opened, you must perform the explicit action again to make the To Do the 'current To Do' for that session.

To Do Characteristics

Characteristics are used to associated related information to a To Do entry. Refer to Linking Additional Information to a To Do Entry for more information.

Several pages in the system allow you to view a To Do entry's characteristic values and / or search for To Do entries by their characteristics.

- The To Do Management portal includes up to five filters to search for To Do entries by a characteristic value. In addition, the search results display all the current characteristics as name / value pairs.
- The To Do Entry includes a zone to display any existing characteristics. In addition, if a user is allowed to modify a To Do Entry, the edit dialogue allows a user to add or change characteristics. Note that for manual To Do types, the valid characteristic types are driven by the To Do type. For automated To Do types, if valid To Do characteristic types are configured on the To Do type, only those are available. Otherwise, any valid To Do characteristic type may be linked.
- The To Do Search allows includes a single characteristic type / value filter.

Related To Do Entries

A user working on a To Do may want to know of other To Dos that may be related to the same problem. If they can be worked by the same user they may get resolved faster. It seems almost impossible to programmatically determine

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whether two To Dos really stem from the same problem. The user should therefore be presented with a list of potentially related To Dos from which they can select the truly relevant ones.

A To Do entry is considered potentially related to a given To Do if they reference a common entity via a characteristic. For example, if a given To Do references a certain account then any To Do referencing that same account is considered related to it.

Note: The common entity is any characteristic value linked to the To Do entry where the characteristic type is a **Foreign Key** and the main table of the foreign key is classified as a **Master** or **Transaction** table.

There are various places where the user is informed as to whether or not the current To Do Entry is related to other To Do Entries.

- To Do entry maintenance displays in insight indicating the number of related To Do Entries for the current To Do. In addition, a Related To Do Entries zone shows information about each related To Do.
- The Current To Do zone includes related To Do information and actions.
- The To Do Management query includes a count of related To Do entries.
- The To Do Search page supports a **Related To Do filter** that lists all related To Do entries for a given entry.

Complete A To Do

After you finish working on an entry, you can mark it as **Complete**. At this point, you may want to review potentially related To Do entries and complete those that have been addressed by resolving the problem associated with the current entry.

When you complete a To Do, a log entry is created that indicates when the To Do was completed and by whom.

There are multiple ways in which you can complete a To Do.

- The To Do Management page provides many filters in addition to To Do Type. One or more entries may be completed in this page.
- Use the To Do Entry page to complete a single To Do Entry. The user may also choose to add comments when completing a To Do on this page.
- You may use the Current To Do zone to complete the current entry you are working on and/or all related entries assigned to you.
- The To Do List page allows you to complete one or more selected entries of a specific To Do Type.
- The To Do Search page allows you to search for To Do entries using various search criteria and complete selected ones.

Note: It is possible for the system to automatically mark an entry as **Complete**. Refer to The Lifecycle Of A To Do Entry for more information.

Log Entry Events

Any user may add a **User Details** log entry to any To Do at any time (even after it's completed). Refer to To Do Entry page for more information.

The To Do Management portal also allows users to add a **User Details** log entry to one or more selected entries.

In addition, there are several log entries created automatically by the system. The log includes a status column, which captures the status of the To Do at the time of log. If the To Do entry is **Assigned** and its substatus **In Progress** or **On Hold**, the log captures the substatus value, otherwise it captures the status value.

The following table contains the list of all possible log events.

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Event	Log Type	Log Status	Content of Details	Content of Assigned To (on To Do entry and To Do Log)	Log User ID	Contents of Sent By (on To Do entry)
A To Do is created (by the system or by a user)	**Created**	**Open**			ID of user who created the To Do	
A To Do is created (by the system or by a user) in Assigned status	**Created**	**Assigned**		User ID of user who was assigned this To Do	ID of user who created the To Do	Creating user's ID
A To Do is completed (by the system or by a user)	**Completed**	**Complete**			ID of user who completed the To Do	
A user takes an open To Do	**Assigned**	**Assigned**	Selected by user	Assigned To User ID	Assigned To User ID	ID of user who assigned the To Do
A supervisor assigns a To Do to a user (also happens if they reassign)	**Assigned**	**Assigned**	Assigned to user	Assigned To User ID	ID of user who assigned the To Do	ID of user who assigned the To Do
A user forwards an entry to a user	**Forwarded**	**Assigned**	*Log details entered by user*	Forwarded To User ID	ID of user who forwarded the To Do	ID of user who forwarded the To Do
A user forwards an entry to a role	**Forwarded**	**Open**	Forwarded to role *Role Description (Role ID)* + *Log details entered by user*		ID of user who forwarded the To Do	ID of user who forwarded the To Do
A user sends back a To Do	**Sent back**	**Assigned**	*Log details entered by user*	Sent Back To User ID	ID of user who sent back the To Do	ID of user who sent back the To Do
The status is updated (aside from the cases that have an explicit log type)	**Status Updated**	Current status of To Do		User currently Assigned, if applicable	ID of the user the made the status update	
A user adds a log entry	**User Details**	Current status of To Do	*Log details entered by user*		ID of user who added the entry	

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Event	Log Type	Log Status	Content of Details	Content of Assigned To (on To Do entry and To Do Log)	Log User ID	Contents of Sent By (on To Do entry)
A user manually overrides priority	**Override Priority**	Current status of To Do	Priority changed from *old value* to *new value*	Assigned To User ID	ID of user who made the change	
Priority is updated by a calculate priority algorithm	**Calculated Priority**	Current status of To Do	Priority changed from *old value* to *new value*		ID of user that added or updated the To Do or the user associated with the Recalculate Priority batch job.	

Managing To Do Entries

This section describes the various pages available to view and work on To Do entries.

To Do Management

The To Do Management portal provides a multi-query zone that includes a search for To Do entries using To Do Type and other To Do information. Users may search for entries using multiple criteria and perform common actions, such as assignment and completion, on selected entries.

It is intended to be used by both supervisors and non-supervisor To Do users. Supervisors are identified by their security access to the portal.

Use **Menu** > **To Do** > **To Do Management** to navigate to the portal.

To Do Information Search

This zone allows you to search for non-closed To Do entries using various attributes of the entries, and to perform actions on selected ones.

Note: Results are restricted by role. For supervisors, this search returns To Do entries that meet the search criteria and are in a role of which the supervisor is a member. For non supervisors, the search returns open To Do entries that meet the search criteria and are in a role of which the user is a member or entries currently assigned to the user. Refer to To Do Entries Reference A Role for more information about roles.

The following sections describe the features of this zone.

Search Filters

The following table describes each of the different filters supported by this zone.

Search Filter	Description
To Do Type	Use this filter to restrict the search to To Do entries of a specific type. Only To Do Types where the user is a member of at least one valid role for the type will be available for selection.

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Search Filter	Description
Status	Use this filter to restrict the search to To Do entries with a status of **Open** , **Assigned**, **In Progress** or **On Hold**. If you choose Assigned, then it includes the To Do entries that are In Progress and On Hold. Note that the underlying query excludes completed To Do entries.
Days Old	On the **To Do Management** portal, this option is represented by a pair of filter fields. Use these filters to restrict the search to To Do entries whose age falls within a given range in days. For example, entering values of 2 - 5 will restrict the search to entries that are greater than or equal to two days old and less than or equal to five days old. On the **To Do Dashboard** portal, this option lists the To Do Summary age ranges as set up for the user. Select a specific age range to restrict the search to To Do entries whose age falls within the given range in days.
Assign To User	Use this filter to restrict the search to To Do entries assigned to a particular user. This filter only appears if the current user has To Do supervisor access.
Priority	Use this filter to restrict the search to To Do entries with a specific priority.
Key Value	Use this filter to restrict the search to To Do entries with a sort key value containing the entered value.
Message	Use this filter to restrict the search to To Do entries with a specific message. This filter appears after the To Do Type filter has been populated and shows a list of the message texts from all non closed To Do entries of the selected To Do Type.
Characteristic	Use these filters to restrict the search to To Do entries with a specific **Characteristic Type** and value. Up to five characteristic type and value pairs may be entered. For manual To Do types, the list of characteristic types will be restricted to the characteristic types defined for the To Do Type. For automated To Do Types, if valid To Do characteristic types are configured for the To Do type, only those are shown; otherwise, all valid characteristic types for the To Do Entry entity are shown.

The system shows the total number of To Do entries displayed and the total number that satisfy your search criteria immediately below the set of results.

Note: For performance reasons, the search zone is configured to restrict the number of rows retrieved by the query. The 'Total Records' number will indicate whether there are more To Do entries that meet the criteria than can be displayed.

Search Results

The zone will display all To Do entries that meet the search criteria, up to the limit defined as a parameter to the zone. The following columns are displayed initially:

- The Action column includes the button Work. Click this button to drill into the page on which the entry's respective object is displayed. If the To Do type has been configured to associate a script with this To Do entry's message number, then instead of being taken to the respective page, the associated script is launched. Refer to What Happens When You Work A To Do Entry for more information.

Important: Automatic Assignment When you click the Work button for an open entry, the system changes the status of the entry to **Assigned** / **In Progress** and assigns it to you. It also causes this To Do entry to be your current To Do. Refer to Working On A To Do on page 59 for more information.

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> **Note:** **Work List**. This column has a Work List icon. Clicking this icon populates the Work List zone with the results. Clicking on entries in the Work List zone performs all the logic described here when clicking the Work button for one entry. It will drill into the related object or launch a script, if configured. It will make this To Do the 'current' To Do, it will assign it to you if it is **Open** and update it to **In Progress**.

> **Note:** Only 1 **In Progress** To Do entry. If you had a different To Do entry in progress before clicking the Work button, the other To Do entry will be put **On Hold**.

- Entries are sorted by their **Priority**. Highest in priority are listed first.
- **Days Old** is the number of days since the To Do entry was created by the system. Entries are sorted from youngest to oldest within priority.
- **Status** is the current status of the To Do entry. If the assignment substatus is populated, that value is displayed, otherwise the To Do entry status is displayed.
- **Assign To User** is the user currently assigned to the To Do entry.
- **Message** is the message associated with the To Do entry.
- **Related** displays a count of entries that are potentially related to the current entry based on having the same foreign key characteristic values. Click the hyperlink to navigate to the To Do Search page with the current entry as the Related To Do Filter value.
- **Note** displays a Comment icon if there are either comments or a log entry of type **Forwarded**, **Sent Back** or **User Details** on the To Do Entry. Click the icon to open a pop-up window which displays the To Do entry information, message, comments and logs.
- **Characteristics** displays the characteristic types and values for the entry as a concatenated string.
- **Related Entity** displays the information for the object related to this entry. The information string allows you to navigate to the page on which the entry's respective object is displayed.
- **To Do ID** is the system generated key of the entry. Click the hyperlink to navigate to the To Do Entry page to view or maintain the current entry.

Click the **Column Configuration** icon in the zone header to show the Column Configuration Area in which additional columns can be added to the results. The additional columns include the following:

- **Create Date/Time** contains the date and time the To Do entry was created by the system.
- **Key 1** to **Key 5** contain the first five sort key values for the entry.
- **To Do Role** displays the description of the role for the To Do entry.

Actions

The zone provides the ability to perform certain actions on one or more selected To Do Entries.

Click the check box in the results list heading to select all entries displayed in the grid or click the box in a row to select a specific entry. The following actions are available:

- Use the **Update** button to open a pop-up window in which you can update the priority and/or add a **User Details** log entry to the selected To Do entries.
- Use the **Assign** button to assign a user to the selected To Do entries. Supervisors will be presented with a pop-up window in which they can choose the assignee from a list of users who are members of at least one role for the To Do Type. The user search includes information about the number of To Do entries already assigned to each user. For users without supervisor access, the current user is assumed to be the assignee and the window is not displayed. Note that the system does not allow a non supervisor to assign themselves a To Do that is assigned to another user.
- Use the **Unassign** button to reopen the selected To Do entries and remove the assignee. Note that the system does not allow non supervisors to reopen a To Do that is assigned to another user.
- Use the **Complete** button to complete the selected To Do entries. Both supervisors and non supervisors may complete any To Do entry, including those assigned to other users.

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To Do Supervisor Functions

This section describes several To Do transactions that aid supervisors in the monitoring and assignment of To Do entries.

Supervisor To Do Summary

This Supervisor To Do Summary page summarizes To Do entries by To Do Type. Only entries that are **Open** (i.e., not assigned to a specific user) or **Assigned** are summarized.

> **Note:** Only To Do entries that are assigned to a role to which you belong are summarized on this page. Refer to To Do Entries Reference A Role for more information.

Use **Menu** > **To Do** > **Supervisor To Do Summary** to open this page.

Description of Page

This page summarizes all To Do entries that are **Open** or **Assigned**.

> **Note:** This page does not further break down the assigned To Do entries by the substatus. Refer to The Lifecycle Of A To Do Entry for more information on the substatus values.

- **To Do Type** contains the description of the To Do type.
- **Priority** provides a total count of To Do entries of a given type by priority. For each distinct priority the description includes the priority value followed by the corresponding number of entries. If all entries are of the same priority no additional count is displayed.
- **Total** contains the total of **Open** and **Assigned** entries. The hyperlink navigates to the Supervisor To Do Assignment transaction, setting it to display all **Open** and **Assigned** entries for the given To Do Type.
- **Open** contains the number of To Do Entries whose status is **Open**. The hyperlink navigates to the Supervisor To Do Assignment transaction, setting it to display all **Open** entries for the given To Do Type.
- **Assigned** contains the number of To Do entries whose status is **Assigned**. The hyperlink navigates to the Supervisor To Do Assignment transaction, setting it to display all **Assigned** entries for the given To Do Type.

The "age bars" that appear to the right of the totals highlight the age of the To Do entries. The colors red, yellow and green are used to highlight the relative number of old, middle-aged and new To Do entries. The age associated with each of these colors is user-configurable.

Supervisor User Summary

The Supervisor User Summary page summarizes To Do entries by the user who is assigned to work on the entries. Only entries that are **Assigned** are summarized.

> **Note:** Only To Do entries that are assigned to a role to which you belong are summarized on this page. Refer to To Do Entries Reference A Role for more information.

Use **Menu** > **To Do** > **Supervisor User Summary** to open this page.

Description of Page

This page contains a grid that displays all assigned To Do entries by User ID and To Do type. It indicates how many To Do entries of the displayed Type are assigned to the user (Assigned this Type) and how many To Do entries in total are assigned to the user (Assigned Total).

> **Note:** This page does not further break down the To Do entries by the substatus. Refer to The Lifecycle Of A To Do Entry for more information on the substatus values.

Clicking the hyperlinks transfer you to the Supervisor To Do Assignment transaction. On this transaction, you can assign / reassign To Do entries to a specific user. The difference is that clicking the To Do Type hyperlink causes only **Open** entries to be displayed on the Assignment transaction. Clicking the count in the Assigned this Type column causes **Assigned** entries assigned to the displayed user to be shown.

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Supervisor To Do Assignment

This page lists To Do entries of a given type and allows a supervisor to assign / reassign them to a designated user.

Note: Refer to the To Do Management portal for a page that provides many more filters to narrow down the results. In addition, it provides more data in the results and provides more actions for a supervisor to perform for To Do entries.

Use **Menu** > **To Do** > **Supervisor To Do Assignment** to open this page.

Description of Page

This page contains **Open** or **Assigned** To Do entries of a given type. These entries can be assigned to a specified user one-by-one or several at a time. The following points describe this functionality:

- You can select a different **To Do Type** by typing in a value or pressing the search button in the upper right corner. An **Info** description of the To Do type appears on the left.
- You can change the list of entries displayed according to their status. Select the **Filter by** status to be All (blank), **Open**, or **Assigned**.
- For **Assigned** entries, you may also **Filter by User** to limit the search to a specific user assigned to the To Do entries.
- If you want to re-sort the entries by a different value, click the search button adjacent to **Extra Information**. Each row's respective sort value is displayed in the **Extra Information** column.

Note: Extra Information. Each To Do list's default **Extra Information** is defined on the list's To Do Type. Also note that each To Do list's available **Extra Information** differs.

- Click the **Select All** button to select all entries displayed in the grid. Click the **Clear All** to remove the selections in the grid.
- Use the checkbox if you want to assign specific entries.
- Entries are further sorted by their **Priority**. Highest in priority are listed first.
- **Create Date/Time** contains the date and time the To Do entry was created by the system. Click the Create Date/Time hyperlink to navigate to the To Do page where additional information is visible and where additional actions are possible.
- Click the number of **Related** entries hyperlink to navigate to the To Do Search query to list potentially related entries to the current entry.
- **Worked By** shows the user currently assigned to the To Do entry.
- **To Do Entry Status** is the current status of the To Do entry. If the assigned substatus is populated, that value is shown, otherwise the status value is shown. Refer to The Lifecycle Of A To Do Entry for more information.
- **Message** contains a description of the To Do entry. Use the message description hyperlink to drill into the page on which the entry's respective object is displayed. If the To Do type has been configured to associate a script with this To Do entry's message number, then instead of being taken to the respective page, the associated script is launched. Note that clicking this action does not push the To Do Entry into the Current To Do zone and does not assign the To Do Entry to you. Refer to Working On A To Do on page 59 for information about using that functionality.
- You can assign entries to a user:
  - Enter a user ID or search for a user using the **Assign To User** field. You can only select a user that is associated with a role that is associated with this **To Do Type**. Note that the current number of assignments is displayed adjacent.
  - Select one or more entries to assign to this user and click the **Assign** button. The entries' status becomes **Assigned**.

To Do List Functions

This section describes To Do pages that aid users in the assignment and working of entries in To Do lists.

To Do Summary

This page summarizes To Do entries that meet the following qualifications:

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- The entry is **Open** and you belong to the entry's To Do role. Refer to To Do Entries Reference A Role for more information about roles.
- The entry is **Assigned** and you are the user to which it is assigned.

Use **Menu** > **To Do** > **To Do Summary** to open this page.

Keyboard Shortcut	Alternate Shortcut
`Alt+X`	`Alt+Shift+X`

Note: Refer to Shortcut Key Summary for information about the alternate shortcut.

Fastpath: Refer to The Big Picture of To Do Lists for an overview of To Do functionality.

Description of Page

This page is dedicated to a grid that summarizes the To Do entries on which you can work. The following information is displayed:

- **To Do Type** contains the description of the To Do type.
- **Priority** provides a total count of To Do entries of a given type by priority. For each distinct priority the description includes the priority value followed by the corresponding number of entries. If all entries are of the same priority no additional count is displayed.
- **Total** contains the total of **Open** and **Assigned to You** entries. The hyperlink navigates to the To Do List transaction, setting it to display all **Open** and **Assigned** entries assigned to you for the given To Do Type.
- **Open** contains the number of To Do Entries whose status is **Open**. The hyperlink navigates to the To Do List transaction, setting it to display all **Open** entries for the given To Do Type.
- **Assigned to You** contains the number of To Do entries that are assigned to you whose status is **Assigned**. The hyperlink navigates to the To Do List transaction, setting it to display all **Assigned** entries for the given To Do Type.

Note: This page does not further break down the assigned To Do entries by the substatus. Refer to The Lifecycle Of A To Do Entry for more information on the substatus values.

The "age bars" that appear to the right of the totals highlight the age of the To Do entries. The colors red, yellow and green are used to highlight the relative number of old, middle-aged and new To Do entries. The age associated with each of these colors is user-configurable.

To Do List

This page lists To Do entries of a given type that are either **Open** (not assigned to a specific user) or are assigned to you.

Note: Refer to the To Do Management portal for a page that provides many more filters to narrow down the results. In addition, it provides more data in the results and allows the user to adjust the priority of To Do entries.

Note: Restricted by role. Only those entries assigned to a role to which you belong may be seen on this page. Refer to To Do Entries Reference A Role for more information.

Fastpath: We recommend familiarizing yourself with the topics described in The Big Picture of To Do Lists to fully appreciate how To Do entries are managed by the system.

Use **Menu** > **To Do** > **To Do List** to open this page.

Description of Page

This page contains a grid that summarizes the To Do entries of a given type on which you can work.

The **Info** section contains a concatenation of the **To Do Type**'s description and the user's name.

The area beneath **Info** provides you with options that control which To Do entries appear and the order in which they are displayed. The following points describe the various options:

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- Use **Sort By** to define how you want the To Do entries sorted. The following options are available:
  - **Assigned Date - On or After.** This option sorts the To Do entries in chronological order (based on the date the entry was assigned to you) starting from the input **Date**. If you choose this option, the system assumes you want to start from the earliest To Do entry. If you want to start from a date other than the earliest To Do entry, enter the desired **Date** and click the adjacent search button.
  - **Assigned Date - On or Before.** This option sorts the To Do entries in reverse chronological order (based on the date the entry was assigned to you) starting from the input **Date**. If you choose this option, the system assumes you want to start from the today's date. If you want to start from a date other than today's date, enter the desired **Date** and click the adjacent search button.
  - **Create Date - On or After.** This option sorts the To Do entries in chronological order (based on the date the entry was created) starting from the input **Date**. If you choose this option, the system assumes you want to start from the earliest To Do entry. If you want to start from a date other than the earliest To Do entry, enter the desired **Date** and click the adjacent search button.
  - **Create Date - On or Before.** This option sorts the To Do entries in reverse chronological order (based on the date the entry was created) starting from the input **Date**. If you choose this option, the system assumes you want to start from the today's date. If you want to start from a date other than today's date, enter the desired **Date** and click the adjacent search button.
  - **Extra Information**. This option sorts the To Do entries by the value of the **Extra Info**.
- Use **Extra Info** to choose data related to the To Do Entry that should be used to sort the To Do entries. This information is displayed in each entry's **Extra Information** column.

Note: Extra Info. Each To Do types's available **Extra Info** is defined on the To Do Type Sort Keys. Also note that each To Do type's available **Extra Info** differs based on the configuration of the To Do Type.

- Use **Filter by** to restrict the To Do entries based on their status. The following options are available:
  - **All**. This option shows all entries that are **Open** or **Assigned**.
  - **Assigned**. This option shows all entries that are assigned to you.
  - **Open**. This option shows all entries that are **Open**.

The grid that follows contains the To Do entries that match your criteria. The following information appears:

- Click the **Select All** button to select all entries displayed in the grid. Click the **Clear All** button to remove the selections in the grid.
- Use the checkbox if you want to mark specific entries as **Completed** or **Assigned** using the **Complete** or **Assign** buttons at the bottom.
- A Comment icon appears if there are comments on the To Do item and a Log Entry icon appears if there is a log entry of type **Forwarded**, **Sent Back** or **User Details** on the To Do item. This column appears if at least one To Do has either comments or a special log entry.
- Entries are further sorted by their **Priority**. Highest in priority are listed first.
- **Create Date/Time** contains the date and time the To Do entry was created by the system.
- Click the Create Date/Time hyperlink or either of the special icons to navigate to the To Do entry page.
- Click the number of **Related** entries hyperlink to navigate to the To Do Search query to list potentially related entries to the current entry.
- **Assigned Date/Time** contains the date and time the To Do entry was assigned to a user. This field is only populated on entries that are **Assigned**. If a user assigned the To Do entry, the user ID and name of the user who assigned the To Do entry are displayed beneath the Date/Time.
- **Message** contains a description of the To Do entry. Use the message description hyperlink to drill into the page on which the entry's respective object is displayed. If the To Do type has been configured to associate a script with this To Do entry's message number, then instead of being taken to the respective page, the associated script is launched. Refer to What Happens When You Work A To Do Entry for more information.

Important: Automatic Assignment When you drill into an using the message link for an open entry, the system changes the status of the entry to **Assigned** / **In Progress** and assigns it to you. It also causes this To Do entry to be your current To Do. Refer to Working On A To Do on page 59 for more information.

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- **To Do Entry Status** is the current status of the To Do entry. If the assigned substatus is populated, that value is shown, otherwise the status value is shown. Refer to The Lifecycle Of A To Do Entry for more information.
- **Extra Information** contains the data for the entry that corresponds to the Extra Info chosen in the sort options above.
- **To Do ID** contains the unique identifier of the To Do entry.
- If you want to mark one or more entries as **Assigned**, check the desired entries and then click the **Assign** button.
- If you want to mark one or more entries as **Completed**, check the desired entries and then click the **Complete** button. Completed entries do not appear on the To Do list (but they are retained on the database for audit purposes).

To Do Entry

Refer to Understanding To Do Processing for detailed explanations about many To Do entry features.

To view a To Do entry, use **Menu** > **To Do** > **To Do Entry** > **Search** . You are brought to a query portal with options for searching for a To Do Entry. Note that some query options limit the results. Refer to the inline help for more information.

Note: Restricted by role. Any user may change Comments for any To Do Entry. In addition, any user may add user Log details. However, for all other changes and actions, you may only change To Do entries that are assigned to you or ones that are **Open** and assigned to a role to which you belong. Refer to To Do Entries Reference A Role for more information about roles.

Once a To Do Entry has been selected, you are brought to the maintenance portal to view and maintain the selected record.

The inline help provides information about several fields. The following points highlight information about some of the fields that may be visible.

If the To Do entry has non-complete related entries an insight appears indicating the number of related entries. In addition, details about the related entries are shown in the Related To Do Entries zone.

If the To Do entry was **Created By** a background process, information about that background process appears with a link allowing the user to drill into the batch run, if desired. Refer to To Dos Created for Object-Specific Error Conditions for more information.

If the To Do type is configured to To Do Entries May Be Routed Out Of The System, the **Extract Info** appears. If the extract process is pending, the information indicates that. Otherwise, if it has run, information about the background process appears with a link allowing the user to drill into the batch run, if desired.

The **Characteristics** collection shows existing characteristics. This collection is maintained using the Edit action for users that are allowed to update this To Do entry. Refer to To Do Entry Characteristics for more information.

Actions

Most of the actions are self-explanatory and are related to simply updating the status value. This page has three special actions.

- Using the **Work** button causes several things to occur. You drill into the page on which the entry's respective object is displayed. If the To Do type has been configured to associate a script with this To Do entry's message number, then instead of being taken to the respective page, the associated script is launched. If the To Do entry is Open, it gets assigned to you and the assigned substatus is set to **In Progress**, if your implementation has implemented this functionality. Refer to What Happens When You Work A To Do Entry for more information.
- Use the **Forward** to assign a To Do to another user or role. When a To Do is forwarded, a log entry indicates who forwarded the To Do, to whom it was forwarded, and the specified reason. The dialogue prompts for whether to send to a User or a Role. The search for User includes information about the number of To Do entries already assigned to this user. When choosing a User, confirm the correct Role. The Details provided are captured in the log entry.
- **Send Back** is only applicable if the **Sent By** user is populated. When a To Do is sent back, a log entry is created that indicates when the To Do was sent back and by whom. If the To Do is **Open**, this dialogue allows you to send it back to a different role. If the To Do is assigned to you, the dialogue allows you to re-assign the To Do to the person who assigned it to you. The Details provided are captured in the log entry.

Related To Do Entries

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If the To Do has related To Do entries, this zone appears with information about the related entries. Use this zone to perform actions on the current To Do and its related entries.

Adding a Manual To Do Entry

If your system is configured with manual To Do types, you can add a To Do entry online.

Open the **Menu** > **To Do** > **To Do Entry** > **Add.**

You are prompted for a **To Do Type**. Only To Do types that are set up for manual usage appear in the list.

The default **To Do Type Priority** is displayed adjacent. Use **Override Priority** to override the default priority assigned by the system.

Type a **Subject** for your To Do entry. Depending on how the To Do type is set up, the subject may appear as the message in the To Do entry and To Do lists.

Enter a **Comment** to provide a longer description of and more details about the To Do entry.

Send To indicates whether the new To Do will be assigned to a **Role** (the default) or **User**.

The **Role** indicates the role to which this To Do entry will be assigned. Only users of the specified role will be able to view and work on the To Do entry. The role is defaulted from the To Do type. If you want to assign the To Do to a different role, change the specified role. You can only assign the To Do entry to one of the roles specified on the To Do type.

User appears if **Send To** is set to **User**. Use this option if you want to assign the To Do to a specific user. The user must be a member of the selected role.

If the To Do type defines valid characteristic types, the **Characteristics** collection is visible. If any of the characteristic types are flagged as Default on the To Do type, the characteristic type with its default value (if applicable) are displayed.

To Do Search

This page allows you to search for To Do entries using various search criteria, and perform various actions on selected ones. This page includes completed To Do entries in its search results, when applicable with respect to the filter criteria.

Use **Menu** > **To Do** > **To Do Search** to open this page.

Note: Refer to the To Do Management portal for a page that provides many more filters to narrow down the results. In addition, it provides more data in the results and allows the user to adjust the priority of To Do entries.

Note: No restriction by role. This page returns all To Do entries that meet the search criteria, regardless of the To Do entry's role. Using the search, a user may drill into the details of a To Do entry even if the To Do is not assigned to the user. Refer to To Do Entries Reference A Role for more information about roles.

The top half of the page is where you enter the criteria used to search for To Do entries.

CAUTION: Try to be as specific as possible when entering search criteria. Why? Because entering open-ended search criteria may have a severe impact on response times.

The following table describes each of the different search filters.

Search Filter	Description
Related To Do	If you're searching for potentially related entries for a given To Do entry, choose **Specific To Do** for the **Related To Do Filter**. Enter the **To Do ID**. A filter value of **Not Applicable** defaults.
To Do Type	If you're searching for a To Do entry and you know the value of a To Do Type linked to the To Do entry, choose **Specific To Do Type** for the **To Do Type Filter**. Enter the **To Do Type**.

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Search Filter	Description
	A filter value of **All** defaults.
Char Type	If you're searching for a To Do entry and you know the value of a characteristic linked to the To Do entry, choose **Specific Char Type** for the **Char Type Filter**. Enter the **Characteristic Type** and **Characteristic Value**. A filter value of **Not Applicable** defaults. Only characteristic types that include a characteristic entity of **To Do Entry** and that have been marked to allow searching by characteristic value are available.
User	Use this search method if you know the **Created By User**, **Assigned To User** or **Completed By User** for the To Do entry. Enter the appropriate **User Id**. A filter value of **Not Applicable** defaults.
Date Range	Use this field if you're searching for a To Do entry and know the **Date Created** or **Date Completed**. A filter value of **Date Created** defaults. The **Start Date/Time** defaults to the current date, 12:00AM and the **End Date/Time** defaults to the current date, 11:59PM. If you enter a **Date Range Filter** of **All**, the system ignores this search method.
Status	Use this search method to restrict the search to To Do entries with a specific status value. You may search for To Do entries in the status of **Open**, **Assigned** or **Completed**. You may also perform a combination search for To Do entries that have a status value of either **Open** or **Assigned**. A filter value of **All** defaults.

Note: The system allows any combination of values. The system does not try to validate your search combinations, even if they do not make sense. For example, if you enter a **User Filter** value of **Completed By User** and a **Status Filter** value of **Open**, you will not get an error. In this case, the system will find no records that match your criteria (because To Do entries that are Open do not have a Completed By User).

The system shows the total number of To Do entries that satisfy your search results immediately below the grid.

The first group of To Do entries is displayed in the grid at the bottom of the page.

- Click the **Select All** button to select all entries displayed in the grid. Click the **Clear All** to remove the selections in the grid.
- Use the checkbox if you want to perform actions (see below) on specific entries. Only **Open** or **Assigned** entries may be selected.
- A Comment icon appears if there are comments on the To Do item and a Log Entry icon appears if there is a log entry of type **Forwarded**, **Sent Back** or **User Details** on the To Do item. This column appears if at least one To Do item has either comments or a special log entry. Use either icon to navigate to the To Do entry page.
- Entries are sorted by their **Priority**. Highest in priority are listed first.
- **Create Date/Time** contains the date and time the To Do entry was created by the system. Use the hyperlink to navigate to the To Do entry page.
- Click the number of **Related** entries hyperlink to redisplay this page listing potentially related entries to the current entry.
- **Last Assigned Date/Time** contains the date and time the To Do entry was most recently assigned to a user, if applicable, along with the Assigned To user.
- **Message** contains a description of the To Do entry. If the To Do entry is in the status of **Open** or **Assigned**, the message description allows you to drill into the page on which the entry's respective object is displayed. If the To Do type has been configured to associate a script with this To Do entry's message number, then instead of being

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taken to the respective page, the associated script is launched. Refer to What Happens When You Work A To Do Entry for more information.

> **Note: Current To Do**. Drilling into the page by clicking the Message hyperlink does not automatically assign **Open** To Do entries to the user (as the To Do List page does when clicking on the Message). But it does treat this as the user's current to do, enabling the functionality in the Current To Do zone. Refer to Working On A To Do on page 59 for more information.

- **Status** contains the current status of the To Do entry.
- **Completion Date/Time** contains the date and time the To Do entry was completed and the user who completed the entry, if applicable.
- **To Do Type** contains a description of the To Do type for the To Do entry.

Actions

- Use the **Assign** button to assign or reassign the selected entries to a user. Enter a user ID or search for a user using the **Assign To User** field. By default this field is populated with the current user's ID. Note that the user's current number of assignments is displayed adjacent. Upon successful processing, the selected entries are assigned to the specified user and the status of **Open** entries becomes **Assigned**. Additionally, a corresponding log entry is added to each To Do.

> **Note:** You may only assign To Do entries to yourself or to someone else if you are a valid user in the To Do entry's current role.

> **Note:** Only users with **Supervisor Assignment** access rights may reassign entries that are not currently assigned to them.

- Use the **Reopen** button to unassign the selected entries from their users. Upon successful processing, the selected entries become **Open** and a corresponding log entry is added to each To Do.

> **Note:** Only users with **Supervisor Assignment** access rights may unassign entries that are not currently assigned to them and the user must be a valid user in the To Do entry's current role.

- Use the **Complete** button to complete the selected entries.

To Do Dashboard

This portal provides a high level summary of open and assigned To Do entries by various criteria. It is intended to be used by both supervisors and non-supervisor To Do users. An implementation may introduce additional zones to this portal as needed.

> **Note: Results are restricted by role.** For supervisors, the charts consider To Do entries that are in a role of which the supervisor is a member. For non supervisors, the charts consider open To Do entries that are in a role of which the user is a member or entries currently assigned to the user. Refer to To Do Entries Reference A Role for more information about roles.

Use **Menu** > **To Do** > **To Do Dashboard** to navigate to the portal.

The following zones may appear as part of the portal's **Main** tab page

- **Filters.** This zone displays and manages filters restricting the information being displayed.
- **To Do Entries By Role.** This zone summarizes To Do entries by their currently assigned role.
- **To Do Entries By Status.** This zone summarizes To Do entries by their current status.
- **To Do Entries By Priority.** This zone summarizes To Do entries by their priority.
- **To Do Entries By Age.** This zone summarizes To Do entries by age based on age ranges defined for the current user.
- **To Do Entries By Type.** This zone summarizes To Do entries by their to do type.

Selecting a specific slice of data on any of these zones sets it as a filter and broadcasts its value to the other zones on the portal allowing them to filter their data accordingly.

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The following zone appears as part of the portal's **Details** tab page

- **To Do Details** This zone lists To Do entries that match various criteria and allows the user to work and manage the list.

To Do Details

This zone allows you to search for non-closed To Do entries using various attributes of the entries, and to perform actions on selected ones.

Note: Results are restricted by role. For supervisors, this search returns To Do entries that meet the search criteria and are in a role of which the supervisor is a member. For non supervisors, the search returns open To Do entries that meet the search criteria and are in a role of which the user is a member or entries currently assigned to the user. Refer to To Do Entries Reference A Role for more information about roles.

The following sections describe the features of this zone.

Search Filters

The following table describes each of the different filters supported by this zone.

Search Filter	Description
To Do Type	Use this filter to restrict the search to To Do entries of a specific type. Only To Do Types where the user is a member of at least one valid role for the type will be available for selection.
Status	Use this filter to restrict the search to To Do entries with a status of **Open** , **Assigned**, **In Progress** or **On Hold**. If you choose Assigned, then it includes the To Do entries that are In Progress and On Hold. Note that the underlying query excludes completed To Do entries.
Days Old	On the **To Do Management** portal, this option is represented by a pair of filter fields. Use these filters to restrict the search to To Do entries whose age falls within a given range in days. For example, entering values of 2 - 5 will restrict the search to entries that are greater than or equal to two days old and less than or equal to five days old. On the **To Do Dashboard** portal, this option lists the To Do Summary age ranges as set up for the user. Select a specific age range to restrict the search to To Do entries whose age falls within the given range in days.
Assign To User	Use this filter to restrict the search to To Do entries assigned to a particular user. This filter only appears if the current user has To Do supervisor access.
Priority	Use this filter to restrict the search to To Do entries with a specific priority.
Key Value	Use this filter to restrict the search to To Do entries with a sort key value containing the entered value.
Message	Use this filter to restrict the search to To Do entries with a specific message. This filter appears after the To Do Type filter has been populated and shows a list of the message texts from all non closed To Do entries of the selected To Do Type.
Characteristic	Use these filters to restrict the search to To Do entries with a specific **Characteristic Type** and value. Up to five characteristic type and value pairs may be entered. For manual To Do types, the list of characteristic types will be restricted to the characteristic types defined for the To Do Type. For automated To Do Types, if valid To Do characteristic types are configured for the To Do type, only those are shown; otherwise, all valid characteristic types for the To Do Entry entity are shown.

The system shows the total number of To Do entries displayed and the total number that satisfy your search criteria immediately below the set of results.

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Note: For performance reasons, the search zone is configured to restrict the number of rows retrieved by the query. The 'Total Records' number will indicate whether there are more To Do entries that meet the criteria than can be displayed.

Search Results

The zone will display all To Do entries that meet the search criteria, up to the limit defined as a parameter to the zone. The following columns are displayed initially:

- The Action column includes the button Work. Click this button to drill into the page on which the entry's respective object is displayed. If the To Do type has been configured to associate a script with this To Do entry's message number, then instead of being taken to the respective page, the associated script is launched. Refer to What Happens When You Work A To Do Entry for more information.

  Important: Automatic Assignment When you click the Work button for an open entry, the system changes the status of the entry to **Assigned** / **In Progress** and assigns it to you. It also causes this To Do entry to be your current To Do. Refer to Working On A To Do on page 59 for more information.

  Note: Work List. This column has a Work List icon. Clicking this icon populates the Work List zone with the results. Clicking on entries in the Work List zone performs all the logic described here when clicking the Work button for one entry. It will drill into the related object or launch a script, if configured. It will make this To Do the 'current' To Do, it will assign it to you if it is **Open** and update it to **In Progress**.

  Note: Only 1 **In Progress** To Do entry. If you had a different To Do entry in progress before clicking the Work button, the other To Do entry will be put **On Hold**.
- Entries are sorted by their **Priority**. Highest in priority are listed first.
- **Days Old** is the number of days since the To Do entry was created by the system. Entries are sorted from youngest to oldest within priority.
- **Status** is the current status of the To Do entry. If the assignment substatus is populated, that value is displayed, otherwise the To Do entry status is displayed.
- **Assign To User** is the user currently assigned to the To Do entry.
- **Message** is the message associated with the To Do entry.
- **Related** displays a count of entries that are potentially related to the current entry based on having the same foreign key characteristic values. Click the hyperlink to navigate to the To Do Search page with the current entry as the Related To Do Filter value.
- **Note** displays a Comment icon if there are either comments or a log entry of type **Forwarded**, **Sent Back** or **User Details** on the To Do Entry. Click the icon to open a pop-up window which displays the To Do entry information, message, comments and logs.
- **Characteristics** displays the characteristic types and values for the entry as a concatenated string.
- **Related Entity** displays the information for the object related to this entry. The information string allows you to navigate to the page on which the entry's respective object is displayed.
- **To Do ID** is the system generated key of the entry. Click the hyperlink to navigate to the To Do Entry page to view or maintain the current entry.

Click the **Column Configuration** icon in the zone header to show the Column Configuration Area in which additional columns can be added to the results. The additional columns include the following:

- **Create Date/Time** contains the date and time the To Do entry was created by the system.
- **Key 1** to **Key 5** contain the first five sort key values for the entry.
- **To Do Role** displays the description of the role for the To Do entry.

Actions

The zone provides the ability to perform certain actions on one or more selected To Do Entries.

Click the check box in the results list heading to select all entries displayed in the grid or click the box in a row to select a specific entry. The following actions are available:

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- Use the **Update** button to open a pop-up window in which you can update the priority and/or add a **User Details** log entry to the selected To Do entries.
- Use the **Assign** button to assign a user to the selected To Do entries. Supervisors will be presented with a pop-up window in which they can choose the assignee from a list of users who are members of at least one role for the To Do Type. The user search includes information about the number of To Do entries already assigned to each user. For users without supervisor access, the current user is assumed to be the assignee and the window is not displayed. Note that the system does not allow a non supervisor to assign themselves a To Do that is assigned to another user.
- Use the **Unassign** button to reopen the selected To Do entries and remove the assignee. Note that the system does not allow non supervisors to reopen a To Do that is assigned to another user.
- Use the **Complete** button to complete the selected To Do entries. Both supervisors and non supervisors may complete any To Do entry, including those assigned to other users.

Chapter 3

Reports

Topics:

- On-line Report Submission
- Viewing Historic Reports

The following section describes the functionality provided for submitting reports on-line and for viewing reports submitted through a third party reporting tool.

Fastpath: For information about this functionality, see The Big Picture of Reports.

On-line Report Submission

The on-line report submission page enables you to request a specific report to be run. This is only available if your system is able to integrate with your third party reporting system on-line. The system comes configured to integrate with BI Publisher.

Report Submission - Main

This page allows you to submit a report on-line. Navigate to this page using **Menu** > **Tools** > **Report Submission.**.

Description of Page

To submit a report, choose the **Report Code** for the process you wish to submit. Refer to Defining Report Definitions for information about defining reports in the system.

A description of the report is displayed.

The parameters defined for the report on the report definition page are displayed in the grid. To see a description of a parameter, use the search button adjacent to the parameter label.

Note: Default note. The default values displayed for the parameters are defined on the report definition page.

When you have entered the appropriate parameter values, click the **Submit** button to submit the report. Refer to How To Request Reports for more information.

Note: Reports submitted via the on-line report submission page are not logged in the report history repository and are therefore not visible from the report history page. Only reports submitted through your third party reporting tool's batch scheduler are logged in the report history, if supported by the tool.

Viewing Historic Reports

If your third party reporting tool stores historic copies of reports in a repository, you may configure the system to allow a user to view these historic reports on-line.

Note: This page currently does not display historical reports for BI Publisher.

Report History - Main

This page allows you to view a report stored in your third party reporting tool's report repository, if supported. Navigate to this page using **Menu** > **Tools** > **Report History**.

Description of Page

The top part of the page shows the **Report Code**, **Description** and **Long Description** for the selected report.

To select a report, search by either **Report Code** or **Description** and click the adjacent search button. The reports matching your search criteria are displayed. Choose the desired report from the selection list.

Note: Displaying Report History. When you choose a report, the system needs to interface with your reporting software to display a list of historical occurrences of this report.