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Preface

This preface introduces information sources that can help you use the application.

Using Oracle Applications

Help

Use help icons ? to access help in the application. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons. Not all pages have help icons. You can also access the Oracle Help Center to find guides and videos.

Watch: This video tutorial shows you how to find and use help.

You can also read about it instead.

Additional Resources

- **Community:** Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.
- **Training:** Take courses on Oracle Cloud from Oracle University.

Conventions

The following table explains the text conventions used in this guide.

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td><strong>monospace</strong></td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than symbol separates elements in a navigation path.</td>
</tr>
</tbody>
</table>
Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website. Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.

Contacting Oracle

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit My Oracle Support or visit Accessible Oracle Support if you are hearing impaired.

Comments and Suggestions

Please give us feedback about Oracle Applications Help and guides! You can send an e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
1 Get Started

About This Guide

This guide is for anyone who's using the application, which means you! Use it to learn how to do general tasks that apply to some or all product families. If you’re looking for product-specific information, refer to the product-specific guides.

Note: You might come across information in this guide that applies only to certain pages or products.

Let's look at the general tasks that you can do in the application.

Search

Search the business objects you want to see or manage. While most searches are specific to one object, use the search in the global header to search across many business objects.

Watchlist

Use your Watchlist in the global header to track key items and open pages where you work on those items. You can control whether to show or hide specific items in your Watchlist.

Notifications and Approvals

You get notifications when something requires your attention or action, for example an expense report that you need to approve.

Data Management

These data management tasks are available for many business objects:

- Work with a spreadsheet: Create or edit records in a Microsoft Excel file and upload the records back to the application.
- Use attachments: Provide additional information for business objects, for example receipts attached to expense reports.
- See your audit history: See when business objects were created, updated, and deleted, who did the actions, which attributes were affected, and more.
Social Network
Got something important and exciting to discuss? Use Conversations and other social networking options to chat and collaborate with others about business objects on Oracle Social Network.

Scheduled Processes
Run scheduled processes to manage batches of data, and in some cases generate output as reports.

Business Intelligence
Turn your numbers into graphs, tables, or charts to make better business decisions. You can use analyses, dashboards, or reports, and also create or edit analytics and reports if you have an appropriate role.

Personalization and Preferences
Make changes that apply only to you, for example hide table columns or edit infolet titles. You can also use preferences, for example to set your language or change your password.

Help and Troubleshooting
Getting stuck? Look for help icons on pages that provide information to proceed with your tasks. You can also find help in the Applications Help site. If you still can’t fix your issues with the available help, you or your help desk can use troubleshooting tools, such as diagnostic tests.

Accessibility
Set accessibility preferences to use the application in accessibility mode. Here are a few things you can do:

- Use only the keyboard to do your tasks.
- Alter font sizes and screen color.
- Use assistive technology, such as screen readers.

System Requirements
Before using Oracle cloud applications in browsers and on your mobile devices, check the supported browsers and other system requirements. For information about system requirements, see https://www.oracle.com/system-
requirements/. For previous releases, scroll to the end of the page and find the system requirements link for the applicable previous release.

Related Topics

- System Requirements for Oracle Applications Cloud

Sign In and Get Started

Watch video

Use the application link your company gave you to open the Sign In page. Then enter your user ID and password to land on the home page. You can use icons on your home page to get to work areas where you do your tasks. Or, you can find the main menu, called the Navigator, and other options in the global header and go from there. The global header is on every page in the application.

Your administrator chooses your home page layout as panel, banner, or news feed. Here’s the panel layout. The banner layout looks similar, but a horizontal banner appears in the upper region of the home page.

Here’s the news feed layout.
Whichever layout you’re using, your home page includes the UI elements listed in this table. The global header, which includes the Navigator and **Settings and Actions** menu, is available on every page. The work area icons help you navigate quickly to your main work areas. But to find a full list of work areas, use the Navigator.

<table>
<thead>
<tr>
<th>Callout Number</th>
<th>UI Element</th>
<th>What You Use It For</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Navigator</td>
<td>Open any of the work areas that you have access to.</td>
</tr>
<tr>
<td>2</td>
<td>Other global header functionality</td>
<td>Use tools such as Global Search, Watchlist, and Favorites to see or get to what you need to work on. At any point, if you want to return to your home page from any page, you can click the <strong>Home</strong> icon or the logo in the global header.</td>
</tr>
<tr>
<td>3</td>
<td>Settings and Actions menu</td>
<td>Do some general tasks, for example, change your preferences, show help icons if they’re hidden, and sign out. Click your user image or name to open this menu.</td>
</tr>
<tr>
<td>4</td>
<td>Work area icons</td>
<td>Open your work areas from the group of icons on the home page. For example, click the <strong>Getting Started</strong> icon to open the Getting Started work area, where you can see videos and other materials that help you get going in the application. You can also show or hide specific work area icons using the <strong>Personalize Springboard</strong> icon.</td>
</tr>
</tbody>
</table>
Note: The content of the Navigator is generally the same as the work area icons. But based on setup and other factors, you might not find some icons on your home page. In which case, look for the menu item on the Navigator.

Panel or Banner Layout
Here are some specific UI elements that you can see only on a home page with the panel or banner layout. For example, a panel displaying information and a page control.

<table>
<thead>
<tr>
<th>Callout Number</th>
<th>UI Element</th>
<th>What You Use It For</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Panel displaying information</td>
<td>View company announcements or social networking conversations. If you have a banner layout, you see this information in a banner.</td>
</tr>
<tr>
<td>2</td>
<td>Page control</td>
<td>Open a specific view on your home page.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• The first icon, Welcome Springboard takes you to the work area icons.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Most other icons in the page control take you to a page with infolets.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• You might also find a page control icon that takes you to other pages. For example, the Quick Actions icon takes you to a page with a list</td>
</tr>
</tbody>
</table>
Tip: Aside from using the page control icons to navigate between views, you can use the Next and Previous icons, if available, on the sides of the home page.

In this layout, you have some other ways to get to your work areas. For example, you might come across some home page icons that contain three dots, which indicate that they're actually group icons. When you click a group icon, all the work area icons within that group appear, and you can click any of them depending on which work area you want to go to. For example, click the Tools icon and then click Set Preferences to set your general preferences in the application.
## News Feed Layout

In this layout, you still have a set of icons to open your work areas, but they're arranged in tabs.

![Image of News Feed Layout](image)

<table>
<thead>
<tr>
<th>Callout Number</th>
<th>UI Element</th>
<th>What You Use It For</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Tab</td>
<td>See a set of icons and quick actions for a related set of tasks.</td>
</tr>
<tr>
<td>2</td>
<td>Apps section</td>
<td>Go to your work areas.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Here are a few things to know:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• What icons you see in the Apps section depends on the tab you select.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• If you're looking for any standalone work area, such as Setup and Maintenance, check in the Others tab.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• If you can't see any tabs, it means you just have one visible group. In such cases, all icons appear in the Apps section at the top level.</td>
</tr>
<tr>
<td>3</td>
<td>Quick Actions section</td>
<td>Go straight to some key tasks in the selected group. You can use Show More</td>
</tr>
</tbody>
</table>
You might also find some important information displayed in specific sections of your home page.

<table>
<thead>
<tr>
<th>Section</th>
<th>What You Use It For</th>
</tr>
</thead>
<tbody>
<tr>
<td>Things to Finish</td>
<td>View a list of your open notifications, and take required actions. For example, you can approve or reject a new notification even without opening it.</td>
</tr>
<tr>
<td>News and Announcements</td>
<td>Read all relevant news, such as articles, events, and insights.</td>
</tr>
<tr>
<td>Analytics</td>
<td>View infolets, mostly arranged in tabs. If you see an infolet's content at the top level (without any tabs), that means you have just one visible infolet.</td>
</tr>
</tbody>
</table>

**Note:** If you see different section names in your home page, that’s because your administrator renamed them while setting up your home page.

**More About Infolets**

An infolet is a small interactive widget that gives you key information and shows you what’s going on in the areas you work on. You might also find something that you need to follow up on. Here are a few things to know about infolets.

- Infolets have a front view, and might have a back and expanded view. Use the **Back View**, **Front View**, and **Expanded View** icons at the bottom corners of an infolet to open these views.
- Your current infolet view persists as the default view the next time you sign in. For example, if you viewed a back view of the infolet in your last session, you will see the same view by default in your next session.
- Some infolets might also contain links to detailed reports. You can click anywhere in the infolet area to drill down to the detailed report.
- You can also personalize the infolet page. For example, you can move or hide infolets.
This image shows a page with infolets.

Note: Some SCM or Procurement Cloud infolets might function differently from other infolets.

Where You Find Key Tasks
Let's take a closer look at how to find key tasks using the icons in the global header. Don't worry if you can't see some of these icons. Your administrator might have selected a home page layout that doesn't include them.

<table>
<thead>
<tr>
<th>Callout Number</th>
<th>UI Element</th>
<th>What You Use It For</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Global Search</td>
<td>Find what you want to work on and open the corresponding page from the search results.</td>
</tr>
<tr>
<td>2</td>
<td>Home</td>
<td>Return to the home page.</td>
</tr>
<tr>
<td>3</td>
<td>Favorites and Recent Items</td>
<td>Bookmark pages or go back to those you recently opened.</td>
</tr>
<tr>
<td>4</td>
<td>Watchlist</td>
<td>Open pages for key items that you're tracking.</td>
</tr>
<tr>
<td>5</td>
<td>Notifications</td>
<td>See informational messages and tasks that you must act on.</td>
</tr>
</tbody>
</table>
Sign Out

Once you’re done working in your application, you can sign out using the Settings and Actions menu. Click your user image or name to open this menu, and select Sign Out.

*Note:* If you leave your application idle for 30 minutes, your session will time out. But the timeout period varies on certain pages, for example, pages that automatically refresh or UIs that open up in separate browser windows or tabs.

**Related Topics**
- Change Your Photo
- Configure Home Page Navigation
- Overview of Configuring Themes and Home Page Settings
- How You Use and Personalize Infolets in Oracle SCM and Procurement Cloud

Overview of Work Areas

*Watch video*

A work area is a set of pages that provides everything you need to accomplish a business goal. Let’s explore a couple of work areas to see their common features.

You can use the Navigator to open work areas. The first thing you see when you open any work area is the landing page. Landing pages typically summarize data and let you drill down to more details. Often you can change the records in the summary list by running a different search or clicking an infotile. In some work areas, you can display the list as a grid instead. Let’s look at some examples.
Landing Pages with Infotiles

First, let’s walk through the Travel and Expenses work area. To open this work area, you click Expenses on the Navigator, and you will see the Travel and Expenses work area.

![Travel and Expenses work area](image)

This table shows the available UI elements on the landing page and explains what you use them for.

<table>
<thead>
<tr>
<th>Callout Number</th>
<th>UI Element</th>
<th>What You Use It For</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Row of infotiles</td>
<td>Display key information about a set of records, such as expense items and expense reports.</td>
</tr>
<tr>
<td>2</td>
<td>Summary table</td>
<td>View records for the infotile you select.</td>
</tr>
<tr>
<td>3</td>
<td>Panel tab</td>
<td>Do additional tasks, such as use the links to go to related tasks.</td>
</tr>
</tbody>
</table>

In this work area, you land on a page with a row of infotiles. Each infotile gives you key information about a specific business object. You select an infotile to see the related set of records, and you can click links in the infotile to filter the records. Suppose you want to see the expense reports that you need to act on. First, you click the Expense Reports infotile, and then click the Requires Action link. The summary table lists the matching records. You click a record to see more details or to take some quick actions, such as attach receipts to a hotel expense record.

Some pages have tabs to take you to another page in the work area or to other parts of the same page.
Landing Pages with Grid and List Views

Let's look at the My Team work area as an example. To open this work area, you click My Team on the Navigator. This landing page displays records in the form of a grid or list. You can switch between these two views of the same records.

Here's an example of the grid view showing each record as a card (1), laid out in a grid. Cards provide a summary view of a record, in this case people, using text, links, or images. You can flip the card to see additional information on the other side. You use the Grid icon (2) and the List icon (3) to switch between the grid and list views.

And here's the same information in a list view, which displays the record in a table (1). With either view, you can open and edit any of the records, or select the action you want to take from the Actions menu (2).

In either view, you can usually select actions to take on specific records, or open up the record to see or edit details on another page.
Landing Pages with Infolets

Some landing pages consist of only infolets. Each infolet is a small, interactive widget that gives you key information and actions for a specific subject related to the work area. Infolets have a front view and possibly also a back and expanded view.

This is what a landing page with infolets looks like.

From an infolet, you can usually open other pages in the same work area or another work area. You can also personalize the infolet page by moving or hiding infolets.

Related Topics
- How You Use Tables

Change Your Password

After you sign in, you can change your password for better security.

1. Click your user image or name in the global header, and on the Settings and Actions menu, select Set Preferences.
2. In the General Preferences section, click Password, and enter your password details.
3. Click Save and Close.

Work as a Proxy

You must have the Impersonate User (FND_IMPERSONATE_USER_PRIV) privilege to work as a proxy, which means on behalf of another user.

1. Click your user image or name in the global header.
2. Click Switch To and select the user you want to work on behalf of.
3. Enter your password.
4. Click **Confirm**. You’re ready to work as a proxy.

As a proxy, you can access all the data and tasks of the actual user. All the tasks you do are logged as though the actual user worked on them. After you’re done working as that user, switch to another assigned account, or sign out and sign back in to your own account.

**FAQs for Getting Started**

**What do I do if I can't find springboard icons or Navigator menu items I expect?**

Here are a few things you can do.

- If you can't find an icon on the [springboard](#), look for the menu item on the [Navigator](#). The Navigator is the main menu containing links to all work areas you have access to. If you don't find the menu item on the Navigator also, contact your administrator.
- If you’re using a mobile device, you might not find some springboard icons or Navigator menu items because your administrator has disabled it. In such cases, contact your administrator.

**Why are springboard icons appearing at the top level instead of appearing within a folder?**

By default, some page entry icons in the Welcome Springboard appear after you click the corresponding group icon. But, depending on what you have access to, these page entry icons can actually appear at the top level (not in a group), as described in this table.

<table>
<thead>
<tr>
<th>What You Have Access To</th>
<th>How Icons Are Displayed on the Springboard</th>
</tr>
</thead>
<tbody>
<tr>
<td>Only one page entry within a specific group</td>
<td>That one icon is displayed at the top level</td>
</tr>
<tr>
<td>Less than 16 page entries total, with duplicate page entries,</td>
<td>These icons appear in their respective groups</td>
</tr>
<tr>
<td>that is, multiple page entries with the same name</td>
<td></td>
</tr>
<tr>
<td>16 or fewer page entries total, which are all unique</td>
<td>All icons are at the top level</td>
</tr>
<tr>
<td>14 or fewer page entries total outside the Configuration</td>
<td>These icons appear at the top level, and only the icons within Configuration and</td>
</tr>
<tr>
<td>group and the Tools group</td>
<td>Tools remain in the respective groups</td>
</tr>
</tbody>
</table>
Why can't I see the filmstrip of work area icons on my page?

That's because of any of these reasons.

- Probably you're in a news feed layout.
- Your administrator has disabled the filmstrip.
- Your work area doesn't have any related work area.

What determines the icons that appear on the filmstrip?

Here are some scenarios that determine the content of the filmstrip.

- The filmstrip includes icons for all the pages within the group, even any icons that are currently hidden in the springboard.
- The filmstrip doesn't appear at all if the work area you use has no related work areas within the group.
- If all work area icons appear at the top level on the springboard, then those icons appear in the filmstrip for all the pages.

Why can't I see announcements on the Home page?

Your administrator may have:

- Disabled announcements on the Home Page Layout page in the Appearance work area.
- Not created any announcements.

Related Topics

- Create and Enable an Announcement
- Define Home Page Appearance

Why can't I see some icons in the global header?

If your administrator has selected News feed as the default home page layout, you may not see some icons, such as Favorites and Recent Items and Watchlist in the global header.

Related Topics

- Overview of Configuring Themes and Home Page Settings

Why can't I see the map for contextual addresses?

If you have enabled the pop-up blocker for your browser, you might not see the map when you click the contextual address icon. The contextual address is marked with an orange triangle, the More icon. When you hover over the
triangle, an icon appears that you can click to display the address on a map. To view the address on the map, you can disable the pop-up blocker in your browser settings and try again.

The following figure shows a work address with the contextual address icon.

```
<table>
<thead>
<tr>
<th>Work Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Road Number 1</td>
</tr>
<tr>
<td>Sacramento, 95841</td>
</tr>
<tr>
<td>UNITED STATES</td>
</tr>
</tbody>
</table>
```

**Related Topics**

- Set Up the Mapping Service for Contextual Addresses
2 Search

What's the difference between the various searches on the page?

Use the search in the global header, the global search, to quickly find something based on keywords. Especially if you want to search across many business objects (or categories), or you don't have more specific criteria. When enabled, the global search is available no matter which page you're on.

To find specific objects or enter multiple, detailed criteria, use the searches on the pages where you do your work. Some pages also have keyword searches that let you quickly search for the same business object.

Global Search

Examples of Using Wildcards and Quotation Marks in Global Search

The following scenarios provide examples of using wildcards or quotation marks in global search. Actual search results may vary, depending on factors such as how the search is set up or what data is available. For example, if you enter account ID as the search term, you should get all records with both words. But if there are no results with both words, then you get records with only one of the words.

Note: The global search:
- Is not case sensitive
- Ignores characters that are not in the indexed language

Using Quotation Marks

Enter multiple words with quotation marks to get records that have the exact phrase. For example, if you search for "currency code", then only records with the exact phrase currency code are included in the search results.

Using Wildcards

Use the asterisk (*) wildcard to get records that replace the wildcard with zero or more characters. Use the question mark (?) to replace the wildcard with exactly one character.

- Enter the wildcard in the middle or at the end of a search term.
- To include * or ? in your search results, precede the symbol with a backslash (\) when you enter the search term. The symbol would not act as a wildcard, but as any other character in your search term.
This table shows some wildcard examples.

<table>
<thead>
<tr>
<th>Search Term</th>
<th>Matches</th>
</tr>
</thead>
</table>
| add*        | • The word add  
|             | • Words beginning with add, such as address |
| country c*  | Phrases such as country code or country club |
| exp?nse     | Words such as expense or expanse |
| exception \*| The phrase exception * |

**FAQs for Global Search**

**How can I select the categories to search on in the global search?**

If personalization is available for the *global search* (based on setup):

1. Click in the search field.
2. Click the **Personalize** icon in the **autosuggest**.
3. In the Search Categories tab, select the categories to search on.
4. Click **OK**.

**How can I select the groups to include in the autosuggest for the global search?**

If personalization is available for the *global search* (based on setup):

1. Click in the search field.
2. Click the **Personalize** icon in the **autosuggest**.
3. In the Autosuggest Groups tab, select what you want to see in the autosuggest, and set the order that the groups appear in.
4. Click **OK**.

**Why isn't the global search providing the results that I expect?**

Results are based on indexes that are refreshed on a regular basis. Until the next refresh, you might not find recently created records, or attribute values might be outdated.

The business object you're looking might not be included in the search.

- Personalize the *global search* (if enabled) and make sure the search category is selected.
- If you don't see a corresponding search category to select, then the business object isn't set up for the global search. Instead, use the search in the *work area* for that object, especially if you want to see the latest information in the search results.

If you ran a saved search, you're likely to get results that are different from when you created the saved search. The results themselves aren't saved, so records could have been added, edited, or deleted in the meantime.

Finally, make sure that you're correctly using symbols (for example wildcards) in search terms.
How can I create a saved search for the global search?
To save search terms and filters for later use in the global search (if available based on setup):

1. Run the search with the search terms that you want to save.
2. In the search results, click the Show Filters button if the filters are hidden.
3. Set any filters you want to save.
4. Click the Save button.
5. Name your saved search.
6. Close the Edit Saved Searches dialog box.

How can I change the criteria in saved searches for the global search?
In the global search:

1. Run the existing saved search.
2. In the search results, click the Show Filters button if the filters are hidden.
3. Update keywords or filters.
4. Click the Save button.
5. Leave the name as is to overwrite the existing saved search.
6. Close the Edit Saved Searches dialog box.

How can I rename or delete saved searches for the global search?
In the search results for global search:

1. Click the Show Filters button if the filters are hidden.
2. Click the Save button.
3. Select your saved search.
4. Rename the search or click Delete.
5. Close the Edit Saved Searches dialog box.

Page-Level Search

Examples of Using Wildcards and Quotation Marks for Searches on the Page

The following scenarios provide examples of using wildcards and quotation marks in search fields. Actual search results may vary, depending on factors such as how the search is set up or what data is available. These examples apply only to searches on the page, not in the global header.

Note: In most cases, the search field is not case sensitive.

Using Quotation Marks

In searches with a single field for search terms, enter multiple words with quotation marks to get records that have the exact phrase. For example, if you search for "currency code", then only records with the exact phrase currency code are included in the search results.
Using Wildcards

Use the percent (%) wildcard to get records that replace the wildcard with zero or more characters. Use the underscore (_) to replace the wildcard with exactly one character.

- Enter % or _ at the beginning (only in search fields that are conditionally required or not required), middle, or end of a word.

⚠️ **Caution:** Using a wildcard at the beginning of a word can affect performance.

- You can use the wildcard more than once in one word.
- If the search criterion has an operator, you must select **Starts with** or **Contains** for the wildcard to work.
- To include % or _ in your search results, precede the symbol with a backslash (\) when you enter the search term. The symbol would not act as a wildcard, but as any other character in your search term.

If you’re using an operator other than **Starts with** or **Contains**, then you don’t need to precede % or _ with \, for the same effect.

This table shows some wildcard examples.

<table>
<thead>
<tr>
<th>Search Term</th>
<th>Matches</th>
</tr>
</thead>
</table>
| add%        | - The word *add*  
 |             | - Words beginning with *add*, such as *address* |
| exp_nse     | Words such as *expense* or *expanse* |
| e_p%        | Words such as *especially* or *experience* |
| amount \%   | The phrase *amount %* |

In some cases, the _ wildcard might not match spaces or symbols that separate words. For example, *currency_code* might not match *currency code* or *currency/code*.

Searches with Multiple Criteria

**Save Searches with Multiple Criteria**

On many pages, you can run a search with multiple search criteria to find specific business objects. Some of these searches have a Saved Search list, as well as a Save button after the search criteria. A saved search captures search criteria and other settings so that you can easily run the same search again later. Aside from using any predefined saved searches, you can create and edit them for your own use. If you have the appropriate roles, you can also create and edit saved searches for other users using Page Composer.
The following figure shows an example of a search with multiple search criteria fields and a Save button. For each field, you can select an operator and enter search terms. You can also select from the Saved Search list to use an existing saved search.

Create Saved Searches
Follow these steps:
1. Go to a search that has a Save button.
2. Optionally add or reorder fields, if available.
3. Enter your search criteria values, and, click the Save button.
4. Name your saved search and define its settings:
   - **Set as Default**: The saved search is automatically selected whenever you open this page.
   - **Run Automatically (if available)**: The saved search runs on this page as soon as you select it from the list of saved searches.
     If you select both options, then the saved search automatically runs whenever you open this page.
5. Close the dialog box.

Your saved search can be limited to the current page, or in some cases available in other searches for the same object.

Change the Search Criteria in Saved Searches
Follow these steps:
1. Select the saved search if it's not selected already.
2. Set your search criteria, including any additional fields.
3. Click the Save button.
4. If the saved search is one that you created, save without changing the name.
   If it's predefined, then you can't overwrite it, so you create a new saved search with a unique name.

Change Settings or Rename and Delete Saved Searches
Follow these steps:
1. Go to a search that has a Save button.
2. Select Personalize from the Saved Search list.
3. In the Personalize Saved Searches dialog box, select a saved search.
4. Change any of the settings, where available.
   - **Set as Default**: The saved search is automatically selected whenever you open this page.
   - **Run Automatically**: The saved search runs on this page as soon as you select it from the list of saved searches.
Show in Search List: The saved search is available for you to select and run on this page.
- You can still find hidden saved searches in the Personalize Saved Searches dialog box.
- You can't change this setting if the saved search is currently selected on your page.

Note: Some settings can't be changed for predefined saved searches. What you do change applies only to you, unless you're editing the saved search within Page Composer.

5. If you selected a saved search that you created, then you can rename or delete it. You can't do so for predefined saved searches.
6. Save your changes and close the dialog box.

Related Topics
- Create Watchlist Items

What gets saved when I create a saved search for searches with multiple criteria?
The saved search includes the:
- Visible search fields
- Operator and value for each field
- Search mode, either basic or advanced
- Query By Example filters, in some cases

You don't save the current set of search results or the search result sort order.

Keyword Searches with Filters

Use Filters with Keyword Searches
One type of search you might find on the page is a keyword search with filters. The single search field takes your search terms and matches against one or more attributes of a business object. After you run the search, you can use filters to narrow down results.
The following figure shows an example of a search with a single field for search terms, as well as a link to show or hide filters.

Running Searches and Applying Filters
Follow these steps:
1. In the search field, enter search terms and click Search, or select an item from the autosuggest.
2. Click the Show Filters link if filters are currently hidden.
3. Optionally organize filters as follows, depending on what's available to you:
   - Use the Add or Reorder buttons.
   Note: Avoid adding a filter that's already displayed, unless you're sure that your filter values can work together to produce search results.
Click the **Personalize** icon to show, hide, or reorder filters, and click **OK**.

4. **Apply filters as follows, depending on which type of filters is available:**
   - Set filter values, and click the **Search** button.
   - Select a filter or set a filter value to automatically refresh results accordingly, and use additional filters to narrow down results further.

**Save Keyword Searches with Filters**

One type of search you might find on the page is a keyword search with filters. Some of these searches have predefined saved searches, and you can also create and edit saved searches for your own use. A saved search captures entered search terms, filters, and other settings so that you can easily run the same search again later. If you have the appropriate roles, you can also create and edit saved searches for other users using Page Composer.

**Create and Edit Saved Searches**

Follow these steps:

1. Enter search terms in the search field, and click **Search**, or select a saved search in the autosuggest.
2. Click the **Show Filters** link if filters are currently hidden.
3. Optionally organize filters as follows, depending on what's available to you:
   - Use the **Add** or **Reorder** buttons.
   - Click the **Personalize** icon to show, hide, or reorder filters, and click **OK**.
4. Set filter values or select filters, and click the **Save** button.
5. Name your saved search.
   - To create a saved search, enter a new, unique name.
   - To update an existing saved search that you created, save with the original name.

You can't overwrite predefined saved searches by using their names, but you can create a copy with a unique name.

6. Click **Set as Default** if you want the saved search to be automatically selected whenever you open this page.
7. Click **OK**.

Your saved search can be limited to the current page, or in some cases available in other searches for the same object.

**Change Settings or Rename and Delete Saved Searches**

Follow these steps:

1. Click the **Show Filters** link if filters are currently hidden.
2. Select **Manage** from the **Saved Search** list.
3. Define settings for any saved search, predefined or user-defined, in the Manage Saved Searches dialog box:
   - **Default**: The saved search is automatically selected whenever you open this page.
   - **Show in Saved Search List**: The saved search is available for you to select and run on this page. You can still find hidden saved searches in the Manage Saved Searches dialog box.

   **Note**: Changes you make to predefined saved searches apply only to you, unless you're editing the saved search within Page Composer.

4. The **Active** setting identifies the saved search that's currently selected on the page. You can designate a different active saved search to have that saved search automatically selected as soon as you click **OK** in this dialog box.
5. For user-defined saved searches only, you can also rename or delete the saved search.
6. Click **OK**.
3 Watchlist

Overview of Watchlist

Use the Watchlist to track important business objects and open the pages where you work on those items. Items are organized into categories, and the Watchlist tells you how many of each item you have. For example, in the Expenses category, one Watchlist item is the Reports awaiting submission link. You can click the link to open the Expenses work area, and edit and submit those two expense reports. To open your Watchlist, you can click the Watchlist icon in the global header, only if your default home page layout is Panel or Banner.

Personalization

Aside from using predefined Watchlist items, you can create your own items, based on saved searches. You can use the Watchlist page in the Set Preferences work area to determine which categories and items to show or hide in your Watchlist.

Related Topics
- Show or Hide Watchlist Items
- Why are some items not displayed in my Watchlist
- Why can't I see some icons in the global header

Create Watchlist Items

Some saved searches are available for you to use as Watchlist items. Open a page that has saved searches and the Manage Watchlist button enabled. All saved searches from this page that you designate as Watchlist items would appear within one predefined Watchlist category.

Use Saved Searches as Watchlist Items

Follow these steps:
1. Create a saved search or decide which existing one to use as a Watchlist item.
2. Click Manage Watchlist.
3. Select the saved search you just created or any other that you want to use as a Watchlist item.

Remove Saved Searches from the Watchlist

To remove a Watchlist item based on a saved search, deselect it in the Manage Watchlist dialog box.

If you deleted the saved search first, then also deselect it from the Manage Watchlist dialog box. Otherwise, it remains in the Manage Watchlist dialog box and your Watchlist until the next refresh.

Related Topics
- Show or Hide Watchlist Items
FAQs for Watchlist

How can I rename Watchlist items?

If the item is your saved search, then rename the saved search itself. The Watchlist item name gets updated the next time that the Watchlist refreshes.

You can't rename predefined Watchlist items yourself. You can ask your administrator to do so, but the changes apply to all users.

Related Topics

- Save Searches with Multiple Criteria

Why is the count different between a Watchlist item and the page that the item link takes me to?

Watchlist item counts are refreshed periodically. Relevant records could have been created, edited, or deleted since the last refresh.
4 Notifications and Approvals

Overview of Workflow Tasks

Workflow is an automated process that sequentially passes a task from one user (or group of users) to another. After all assignees address the task, for example by approving it, an end result is achieved. Some tasks are for your information (FYI) only and require no action from any assignee.

Access to Tasks

When a task is assigned to you, you get a notification in the application and in your email. Your worklist has all the tasks relevant to you. To access workflow tasks, you can use the:

- E-mail notifications
- Notifications list in the global header
- Things to Finish section on your home page, if your administrator has selected news feed as the default home page layout
- Worklist: Notifications and Approvals work area (Navigator > Tools > Worklist)
- Worklist: Notifications and Approvals region on My Dashboard, if your administrator has added the region to the dashboard

Examples

Examples of interaction with workflow tasks include:

- When you submit a transaction for approval, you automatically create a workflow task that gets routed to your approvers. If an approver sends the task back to you for more information about your transaction, your action is to provide the requested information. When the transaction is ultimately approved or rejected, you simply get a notification that requires no action from you.
- If you’re a manager and your employee submits a transaction that requires approval up the management chain, your action is to approve or reject the transaction. Other options might be available; for example, you can delegate the task so that someone else does the approval for you.

Actions and Statuses for Workflow Tasks

The status, or state, of a workflow task tells you where it’s at in the approval process. When you’re assigned to a task, what you can do with it depends on many factors, including what the task is and its current state.

Actions

This table describes some possible actions you can take on workflow tasks.
<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ad Hoc Route</td>
<td>Add approvers to the task.</td>
</tr>
<tr>
<td>Approve</td>
<td>Approve the task, and the task completes or moves on to the next approver.</td>
</tr>
<tr>
<td>Claim</td>
<td>Assign the task to yourself so that you can act on it, if the task is currently assigned to a group.</td>
</tr>
<tr>
<td>Create Subtask</td>
<td>Create a child task to be completed as part of the original task.</td>
</tr>
<tr>
<td>Delegate</td>
<td>Pass the task to someone else to take action for you, but the task is still assigned to you.</td>
</tr>
<tr>
<td>Dismiss</td>
<td>Close the task and acknowledge that you received it. You don't need to take action because the notification is only for your information.</td>
</tr>
<tr>
<td>Escalate</td>
<td>Reassign the task to your direct manager.</td>
</tr>
<tr>
<td>Push Back</td>
<td>Reassign the task to the previous approver.</td>
</tr>
<tr>
<td>Reassign</td>
<td>Reassign the task to someone you select.</td>
</tr>
<tr>
<td>Reject</td>
<td>Reject the task and send it back to its creator in a final state.</td>
</tr>
<tr>
<td>Release</td>
<td>Make the task available for other approvers in the group to claim.</td>
</tr>
<tr>
<td>Renew</td>
<td>Give yourself more time (seven days is the default) to act on the task, if the task is about to expire.</td>
</tr>
<tr>
<td>Request Information</td>
<td>Ask the task creator or any of the previous approvers for more information.</td>
</tr>
<tr>
<td>Resume</td>
<td>Revive a suspended task and continue working on it.</td>
</tr>
<tr>
<td>Skip Current Assignment</td>
<td>Reassign the task to the next approver.</td>
</tr>
<tr>
<td>Submit Information</td>
<td>Send the information that was requested of you regarding the task.</td>
</tr>
<tr>
<td>Suspend</td>
<td>Put the task on hold until it's resumed. In the meantime, no one is assigned to act on it.</td>
</tr>
<tr>
<td>Withdraw</td>
<td>Remove the task from the workflow (available only if you created the task).</td>
</tr>
</tbody>
</table>
Statues
This table describes some possible statuses, or states, for workflow tasks.

<table>
<thead>
<tr>
<th>State</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assigned</td>
<td>Task is assigned to you and awaiting your action.</td>
</tr>
<tr>
<td>Completed</td>
<td>Final user in the workflow has addressed the task.</td>
</tr>
<tr>
<td>Errored</td>
<td>Task is in error and can't be recovered.</td>
</tr>
<tr>
<td>Expired</td>
<td>Current assignee hasn't addressed the task within any defined renewal period.</td>
</tr>
<tr>
<td>Information Requested</td>
<td>Assignee requests more information from any user.</td>
</tr>
<tr>
<td>Suspended</td>
<td>Task is put on hold by the task creator and not assigned to anyone to address.</td>
</tr>
<tr>
<td>Withdrawn</td>
<td>Task creator removes task from the workflow.</td>
</tr>
</tbody>
</table>

View and Act On Notifications

Use the **Notifications** icon in the *global header* to open your notifications list. Notifications alert you that something requires your attention or action. The icon itself displays the number of pending notifications you have, if any. Pending means that you haven't yet acted on the notification nor marked it as read. Most notifications are for *workflow* tasks.
The following figure shows the notifications list in the global header. In this example, the Notifications icon indicates that there are 27 pending notifications, one of which is a new notification and just FYI. The other notification in the figure requires action, and you can approve or reject even without opening the notification.

The language of the notification title might not be the same as the language that you selected when you signed in to the application. The title is always displayed in the language that was used when something generated the notification.

**Addressing Notifications**

To view and act on notifications:

1. Click the **Notifications** icon in the global header.

   In the list that opens up, the **Unread** icon (a blue dot) identifies any new notifications. Even if you close the list now without doing anything else, the same notifications are no longer new the next time you open the list.

2. Click the drop-down button next to the window title to switch between pending notifications and all notifications. You can also:
   - Search the notification titles.
   - Click the More Details button to view and manage workflow tasks in your worklist.

3. For a notification requiring action, you can click the:
   - **Approve** or **Reject** link, where available.
   - **Actions** menu and select an action, where available.
   - Notification title to open the details and select from all possible actions you can take. For workflow tasks, you get the same task details that you do from your worklist, using the Worklist: Notifications and Approvals work area or region.

   The notification is considered acted upon and taken off the pending list.

4. For a notification that doesn't require action, you can:
   - Click the **Clear** icon that appears when you hover over the notification, to dismiss the notification.
   - Click the notification title to open the details.
- Do nothing except read the notification title, if the title is just text and not a link because there are no details to display.

In all cases, the notification is considered read and taken off the pending list. To keep a notification as pending, you can click the **Undo** link that temporarily appears next to the notification title after you click the title or Clear icon.

### Using Alternate or Additional Notifications UI

If your administrator has selected news feed as the default home page layout, then you get alternate UI when you click the **Notifications** icon in the global header.

The following figure shows the alternate notifications list. In this example, you can approve or reject the new notification even without opening it. For the other notification, you can use the **Actions** button to act on the task.

![Notifications](image)

With news feed selected, the Things to Finish section on the home page, as shown in the following figure, and the Notifications page are also available.
The first card in the Things to Finish section specifies:

- **Assigned to Me:** The number of open notifications, in this case 34, assigned to you either to act on or just as FYI. The rest of the cards in the Things to Finish section are the notifications assigned to you. These are the same notifications you see in the global header.

- **Created by Me:** The number of workflow tasks you submitted that are still pending final approval, in this case 15.

To view and act on notifications in the Things to Finish section, the global header, or the Notifications page:

1. Click the **Notifications** icon in the global header, or go to the Things to Finish section on the home page.

   To view and manage all your notifications on the Notifications page, you can click the:

   - **Show All** link from the notifications list in the global header
   - Numbers on the first Things to Finish card to open the corresponding tab on the Notifications page, Assigned to Me or Created by Me
   - **Show More** link in the Things to Finish section

   **Tip:** In the Things to Finish section, you can click the Close icon just to remove the card. The notification is still assigned to you, so you can still find it, for example, in the global header or the Assigned to Me tab on the Notifications page.

2. For a notification that requires action, you can click the:

   - **Approve** or **Reject** button, where available.
   - **Actions** menu and select an action, where available.
   - Notification title to open the details and select from all possible actions you can take. For workflow tasks, you get the same task details that you do from your worklist, using the Worklist: Notifications and Approvals work area or region.
3. For a notification that doesn't require action, you can:
   - Click the **Dismiss** button or, on the Assigned to Me tab on the Notifications page, the **Dismiss All** button.
   - Click the notification title to open the details.
   - Do nothing except read the notification title, if the title is just text and not a link because there are no details to display.

4. On the Created by Me tab on the Notifications page, you can see the workflow tasks you submitted that are pending final approval or already completed. Where available, you can take action on the pending items, for example to withdraw your request.

No matter what you do for steps 2 or 3, the notification is taken off the list in the global header and is no longer assigned to you in the Things to Finish section or the Notifications page. You can still find the notification on the All tab on the Notifications page.

### Use Your Worklist to Manage Workflow Tasks

While you can use the notifications list in the *global header* to address recent notifications for *workflow* tasks, you can also use the Worklist: Notifications and Approvals work area for comprehensive access to all of your workflow tasks. For example, you can keep track of tasks that you created, or browse for tasks by status.

You can also access your worklist on My Dashboard, if your administrator has added the Worklist: Notifications and Approvals region to that *dashboard*. You get a quick view of all the tasks that are currently assigned to you.

### Using the Worklist: Notifications and Approvals Work Area

Follow these steps:

1. Click **Navigator > Worklist**.
2. To see only the tasks that you created, click the **Current Selected View** menu and select **Initiated Tasks**. Otherwise, leave the default My Tasks view, or select any other available views.
3. Use the **Status** drop-down list to indicate what tasks to see.
4. Click the task title to view the task details.

   **Tip:** To act on a task without viewing the task details, you can select the row and use the Actions menu in the table toolbar.

5. For tasks requiring your action, use the buttons or Actions menu on the task details page. Possible options in the Actions menu include:
   - **Request Information**: Select the person you want information from, and specify what you're asking for in the **Comments** field. Indicate if the task should come directly back to you or go through the usual workflow process, after the assignee has provided the requested information.
   - **Reassign**: Select whom to pass the task on to. Indicate if you're reassigning the task or just delegating it for someone to act on your behalf.

6. In the task details, you might also be able to:
   - Click the **Create** icon in the Comments section to add your own comment about the task.
   - Click the **Add** icon in the Attachments section to attach a file to the task.
View the approval history in the History section. For example, for a task that you created, you can see who already acted on your request and whose approval you still need. The table and graph present two views of the same history, listing past assignees in sequential order and indicating the status of each assignment. Hover over the boxes in the graph to see more information.

7. For additional things you can do with your worklist, click **View** from the table toolbar in the Worklist: Notifications and Approvals work area. Select **Servers** and click the **Worklist** link.

**Using the Worklist: Notifications and Approvals Region**

Follow these steps:

1. Click **Navigator > My Dashboard**.
2. The Worklist: Notifications and Approvals region displays all tasks assigned to you. Ask your administrator to add the region if you don’t see it on the dashboard.
3. See steps 4 through 6 for using the Worklist: Notifications and Approvals work area.

**Define Vacation Rule for Workflow Tasks Assigned to Me**

Define a vacation rule to determine what happens to workflow tasks that are assigned to you while you’re out of office. You can reassign your tasks to others, or delegate it to them to act on your behalf.
Enabling and Defining the Rule

Follow these steps:

1. In the global header, click the Notifications icon.
2. Click More Details.
3. In the new browser window, click your user name and select Preferences.
4. In the My Rules tab, select the Vacation Period rule if it isn’t already displayed.
5. On the Vacation Period page, select the Enable vacation period check box, and enter the start and end date for your vacation.
6. Select to reassign or delegate your tasks, and provide an assignee.
7. Save your work.

FAQs for Notifications and Approvals

Why are workflow notifications that I acted on still pending in the global header?

The notifications in the global header don’t immediately reflect changes to the workflow task status if you took action elsewhere, for example through email or the Worklist: Notifications and Approvals work area. Such notifications will move from the Pending Notifications list to the All Notifications list after the next scheduled run of the Synchronize Notifications in Global Header process.

Related Topics

- Synchronize Notifications in the Global Header with Workflow Tasks

How do I remove notifications from the list in the global header?

Old notifications aren’t automatically removed. You must click Notifications in the global header and run a search. Notifications older than 30 days are then removed from the list of all notifications. If a removed notification is for a workflow task, then you can still find the task in the Worklist: Approvals and Notifications work area (click Navigator > Worklist).

Monitor and Troubleshoot Transactions

Manage Transactions That Involve Workflow Tasks

After workflow tasks are created, it’s helpful to keep track of them and jump in when you need to, especially when something goes wrong. If you have the appropriate roles, you can monitor and troubleshoot workflow tasks for others and for yourself. Use the Transaction Manager: Transactions page in the Transaction Console work area to manage transactions. A transaction is a business process that involves a workflow task.

- Track transaction statuses and get spreadsheets with information about transactions.
• Download and review diagnostic logs for transactions with errors.
• Depending on what's going on with the transaction and what roles you have, you might be able to, for example, reassign or recover the transaction.

Find Transactions
Follow these steps:

1. Click Navigator > Tools > Transaction Console.
2. If you see tabs, click the Transaction Summary tab.
3. On the Transaction Manager: Transactions page, check the Last Refresh time stamp to see when the transaction statuses were last updated. Click the Last Refresh icon if needed.
4. The page shows transactions with a default Status filter applied, for example Failed. You can remove this filter to get results for all statuses. Or, use the searches and filters to apply your own criteria, for example, to find transactions that are priority 1 or submitted by a specific person.
   o You can use the search to find results based on keywords in the Name or Process Name column, or specifically use the Name or Process Name filters. Name is the person or object the workflow task applies to, and the process reflects the type of workflow task.
   o You can personalize filters to add or hide filters, and create saved searches for future use.
5. Act on the transactions right there from the results table, or click the transaction in the Name column to see details, such as diagnostic information for failed transactions, and go from there.

Act on Transactions Without Opening Details
Here's what you do:

1. Select one or more transactions from the results table.
2. Optionally use the Priority menu to set an issue priority, so that you can later filter on the priority to find these transactions.
3. Open the Actions menu and select an action. If you selected more than one transaction, you see only the actions that can apply to all of them.

Use Transaction Details
What you can see and do in the transaction details depends on the transaction status and what roles you have. For example, for transactions that are in progress or completed, you might see the approval history, which shows who already approved and who the current assignee is, if any.

For failed transactions, you can get information about the issues and, if you're an administrator, usually take some sort of action:

1. Select an issue from the Issues list, if the transaction has more than one issue.
2. Review the information in the Instructions and Details sections, including any description and resolution for the issue, as well as the related workflow task and approval rule.
3. Click the Download link to get the diagnostic log.
4. Use the Issue Priority list to set an issue priority, if you want to later filter on the priority to find this transaction.
5. From the Assigned To list, select the person who should fix the issue, for tracking and filtering purposes.
6. Add comments, for example to track what you're doing to address the issue, or note down any service request IDs. People can see these comments only in the Transaction Console, not when they open the workflow task in the worklist.
7. If you can, take action to address the issue. Here are some examples of how you might go about it:
   o Open the Actions menu and select an action.
Follow up with the person you assigned the issue to or your help desk. Give them the diagnostic log and other information from the transaction details.

Reconfigure the approval rule that the transaction is based on, and have the workflow task resubmitted.

8. Select another issue from the Issues list, if any, and go through the same process.
9. Click Save and Close.

Get a Spreadsheet of Transactions

This is all you need to do:

1. In the results table, select the transactions you want to include in the spreadsheet. To get all transactions, either select all of them or none at all.
2. On the Actions menu, click Download.

Related Topics

- Use Filters with Keyword Searches
- Save Keyword Searches with Filters

Statues for Filtering Transactions

Use the Transaction Manager: Transactions page in the Transaction Console work area to track the status of transactions. For example, you can filter the transactions by status to see just the transactions that are in progress or stuck. These statuses aren’t the actual workflow task statuses that you see in the worklist or in notifications.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auto Recovery</td>
<td>The transaction ran into some issues, but the application is trying to fix them without any action on your end.</td>
</tr>
<tr>
<td>Completed</td>
<td>All approvals are done and the transaction successfully went through all processes.</td>
</tr>
<tr>
<td>Draft</td>
<td>The transaction is saved but not submitted yet.</td>
</tr>
<tr>
<td>Failed</td>
<td>The transaction has one or more errors, for example, due to a network or database outage, or an issue in the approval rules setup.</td>
</tr>
<tr>
<td>In Progress</td>
<td>At least one approval is still pending for the transaction before it’s all done.</td>
</tr>
<tr>
<td>Stuck</td>
<td>The transaction was submitted, but ran into issues so the workflow task doesn’t exist yet.</td>
</tr>
<tr>
<td>Submitted</td>
<td>The transaction was just created and hasn’t moved on yet to another status.</td>
</tr>
</tbody>
</table>
Actions for Managing Transactions

Use the Transaction Manager: Transactions page in the Transaction Console work area to manage and troubleshoot transactions. For example, you can withdraw a transaction even if you’re not the one who submitted it. What you can do depends on the transaction status and the roles you have. Some actions, such as approve and reassign, are the same as the ones you can take on the workflow tasks from the worklist or from notifications.

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Comment</td>
<td>Add your notes for the transaction, for example to track what you're doing to address the issue, or to jot down any service request IDs. People can see these comments only in the Transaction Console.</td>
</tr>
<tr>
<td>Alert Initiator on Error</td>
<td>Notify the submitter if the transaction ends up in error.</td>
</tr>
<tr>
<td>Approve</td>
<td>Approve the transaction if the workflow task is currently assigned to you to approve or reject.</td>
</tr>
<tr>
<td>Download</td>
<td>Get a spreadsheet with information about the selected transactions.</td>
</tr>
<tr>
<td>Reassign</td>
<td>Reassign the workflow task to an approver, the submitter, or someone else.</td>
</tr>
<tr>
<td>Recover</td>
<td>Restart the process after the transaction stopped due to errors. After you address the issue, use this action to get the application to pick up where the process last left off and retry whatever had ended up in error.</td>
</tr>
<tr>
<td>Reject</td>
<td>Reject the transaction if the workflow task is currently assigned to you to approve or reject.</td>
</tr>
<tr>
<td>Terminate Process</td>
<td>Completely end the transaction so that no one can see or act on the workflow task again.</td>
</tr>
<tr>
<td>Withdraw</td>
<td>Remove the workflow task from the workflow. You can ask the submitter to submit again, for example, after an issue is resolved.</td>
</tr>
</tbody>
</table>
5 Data and Files

How can I print the data in the page I am on?

Click your user name or image in the global header and select Print Me, if available, from the Settings and Actions menu. You get a view of the page, which you can then print using your browser’s standard print feature. This view includes any field, table, or other UI element on the page that has data. If the page has tabs, then only the currently open tab is included.

If you want just the data in specific tables, you can also use the Export to Excel button or menu option on the table, if available. You get a Microsoft Excel file containing data from the table, which you can then print.

Tables

How You Use Tables

You can find tables on many pages. Some tables are simple, while others give you several options to view and manage the data. Many of these options are described here, and they may or may not be available on the particular table you’re using. You can find most of the options in the table toolbar, which usually has menus such as Actions, View, or Format.

Select Data

To select a row or column:

- **Row:** Click anywhere within the row. Or, hover over the small cell beside first column, and click when your cursor becomes an arrow.
- **Column:** Hover over the column heading and click when your cursor becomes an arrow. In tables that allow multiselect, you can use the Shift or Control key to select multiple rows at once.

  **Note:** Some items in the table menus or toolbar are disabled until you select a row or column. For example, only after selecting a row can you then select About This Record from the View menu, to see who created and last updated the record, and when.

View Data

To help you view the data in the table, you can:

- Use filters in the toolbar or Query By Example to narrow down the data. Query By Example is the row of fields that precedes the column headings.
- Click Refresh in the toolbar, or select Refresh from the Actions menu. You reload the table with the latest available data.
- Click Detach in the toolbar, or select Detach from the View menu. You can see more of the table in the detached view.
- Select a column and click Wrap in the toolbar, or select Wrap from the View menu. You can see all the text in each cell within the column.
• Click **Export to Excel** in the toolbar, or select **Export to Excel** from the Actions menu. You get a Microsoft Excel file with the data in the table.

**Sort Data**

To sort the data in the table:

• Hover over the column heading of the column you want to sort by, and click the **Sort Ascending** or **Sort Descending** icon.
• Select **Sort** from the View menu.

**Edit Data**

To edit data in a table, you can:

• Select a row and click **Edit** in the toolbar to open a dialog box or another page.
• Click a link in the row to open a dialog box or another page.
• Click a row to make that row editable within the table.

**Manage Columns**

To determine which columns to see and how they appear, you can:

• **Hide or show**: Select **Columns** from the View menu.
• **Resize**: Hover between column headings and move the divider. Or, select the column, and then select **Resize Columns** from the Format menu.
• **Reorder**:
  ○ To move a column, click the column heading and, when your cursor becomes two double-pointed arrows, move the column to a new position.
  ○ To reorder multiple columns, select **Reorder Columns** from the View menu.
• **Freeze**: Select the column that you want to freeze, and then either click **Freeze** in the toolbar or select **Freeze** from the View menu.

**Query By Example**

**Use Query By Example**

Query By Example is the row of fields that precedes the table column headers, used for filtering the data in the table.

**Applying the Query By Example Filter**

Follow these steps:

1. Click **Query By Example** on the table toolbar if the row of fields isn't displayed.
2. Enter filter values in any or all of the Query By Example fields.
3. Press **Enter**.

The table now shows only the records that meet the criteria you entered in all Query By Example fields.
Refreshing the Filtered Results
Do any of the following:

- Press **Enter** again with your cursor in any of the Query By Example fields.
- Click **Search** or **Refresh** on the toolbar, if available.
- Select **Refresh** from the **View** menu, if available.

**Note:** The filter applies even if the Query By Example fields are hidden.

Removing the Query By Example Filter
Click the **Clear All** icon at the beginning of the Query By Example row, if available.

If not, then:

1. Delete what you entered in each Query By Example field.
2. Refresh the table.

To clear not just Query By Example but any other table filters:

1. Select **Clear** from the **View** menu or click **Clear** on the table toolbar, if available.
2. Refresh the table.

Operators and Wildcards for Query By Example
You can use operators and wildcards in **Query By Example** fields. Operators and wildcards work in alphanumeric fields only, not date fields.

Operators
This table describes the operators that you can enter in Query By Example fields.

<table>
<thead>
<tr>
<th>Operator</th>
<th>Description</th>
</tr>
</thead>
</table>
| None (you enter only a value) | - **Character field:** Starts with  
   - **Number or date field:** Equals             |
| >                         | Greater than                                     |
| <                         | Less than                                        |
| >=                        | Great than or equal to                           |
| <=                        | Less than or equal to                            |
| and                       | And                                              |

**Note:** You can use this operator only in conjunction with other operators, for example: >0 and <=1000.
For the $>$, $<$, $\geq$, and $\leq$ operators:

- Results are based on alphanumerical sort, in alphanumerical fields. For example, if you enter $\geq$ABC, then ABC, ABD, ABCA, ACB, and BAC are matches, but not ABS or AB.
- A space is considered part of the filter value. For example, if you enter $\geq$ ABC, then ABC and ABD are matches only if they're preceded with a space.

Wildcards
This table describes the Query By Example wildcards that you can use at the beginning, middle, or end of your entered value. All other symbols are ignored.

<table>
<thead>
<tr>
<th>Wildcard</th>
<th>Description</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>*</td>
<td>Multiple characters</td>
<td>Entered Value: add*&lt;br&gt;Matches: The word add and words beginning with add, such as address</td>
</tr>
<tr>
<td>?</td>
<td>Single character</td>
<td>Entered Value: exp?nse&lt;br&gt;Matches: Words such as expense or expanse</td>
</tr>
</tbody>
</table>

Export to Excel

What's the difference between Export to Excel and desktop integration for Excel? You use the Export to Excel button or menu option to download data from your table as a Microsoft Excel file. You can then use this file to view or analyze your data.

You use desktop integration for Excel to create or edit records in Excel workbooks, and then upload them back into the application. This comes in handy when you have to work offline or make mass updates. In most cases, you download the desktop integrated workbook from a link in a panel tab or your table.

What's included in the file I get when I export a table? You get the rows you select in the table. If row selection is disabled or you don't select anything, then you get all rows, including any that are not visible on the page.

In any case, some data might not be included if:

- Any search criteria, filters, and Query By Example values apply to the table.
- The table has any hidden columns.
• You're working with a table that shows a certain number of rows per page or view. Try going to subsequent pages or views to export.

Translation Editor

Enter or Edit Translated Text
For a row in a table or for a field in a form, you can use the Translation Editor icon (when available) to view, edit, or enter the translated text for the supported languages. You don't need to sign out of your current session to do this task.

1. Click the Translation Editor icon on the table toolbar or in the form.
2. On the Edit Translations dialog box, select the row of your preferred language and enter or edit the translated text in the editable fields. You can enter translation text for multiple languages.
3. Click OK.

If the translated text is in a language that's the same as that of your current session, you can see the translation apply to the UI immediately.

What's the difference between Language and Source Language?
Language refers to the language setting that is active for the application when the user signs in.
Source language refers to the language in which the text value is created. If multiple languages are active, the same text value, in whichever language it is created, is the default text in all translations because the actual translation isn't yet available.
When other values are entered for the translated values in different languages, the source language for each row is overridden with the language of translation.

Desktop Integration for Excel

Set Up Desktop Integration for Excel
You can create or edit records that you can upload to the application using integrated Excel workbooks. To use these workbooks, you must install an Excel add-in.

Note: Every release of Oracle Fusion Applications is likely to have a new version of the Oracle ADF Desktop Integration add-in. When prompted, install the latest version of the add-in. For more information, see Add-In Upgrade Policy for ADF Desktop Integration (2242879.1) on My Oracle Support at https://support.oracle.com.

Before You Start
• Make sure you have an Excel and Windows version that's listed in Supported Platforms for ADF Desktop Integration (2242428.1) on My Oracle Support at https://support.oracle.com.
• If you're reinstalling the Excel add-in and currently have a version older than 11.1.1.7.3 (4.0.0), then uninstall the existing Oracle ADF Desktop Integration Add-In for Excel the same way you uninstall any program on your computer.
  Tip: You can find the version in the control panel where you uninstall programs.
• Optionally install the following from the Microsoft website.
  o Microsoft .NET Framework 4.5.2
  o Microsoft Visual Studio 2010 Tools for Office Runtime (VSTO Runtime)

The add-in installer does check if you have these already, and would download and install them if needed. But, you can manually install them first, especially if you run into issues installing them as part of installing the Excel add-in.

Install the Desktop Add-In
To install the Oracle ADF 11g Desktop Integration Add-In for Excel:

1. Make sure you are signed in to your computer with your account. For example, you can’t have someone else sign in as an administrator and make the installation available for everyone using your computer.
2. In the application, look for the client installer in Navigator > Tools.
3. Run the installer (adfdi-excel-addin-installer.exe) as you would any program that you install on your computer.

Guidelines for Using Desktop Integrated Excel Workbooks
Where available, you can download a desktop-integrated Microsoft Excel workbook and use it to create or edit records. Your edits in the workbook don’t affect the application until you upload the records back into the application.

What You Must Not Do
To ensure that you successfully upload to the application, don’t:

• Rename text from the integrated workbook, for example the worksheet or tab names.
• Add columns.
• Delete any part of the template, for example columns.
• Hide required columns and status columns or headers.

⚠️ Caution: Avoid using the Windows Task Manager and clicking End Task to close Excel. Doing so might disable the add-in.

Conventions
Some column headers in the integrated workbook might include [..]. This means that you can double-click or right-click within any cell in the column to open a dialog box, which lets you select a value to insert into that cell.

Statuses
To use the Status Viewer:

1. Open the tab for your task in the Ribbon, if available. For example, if you downloaded a workbook to create expense items, the tab is called Create Expense Items.
2. Click Status Viewer.
3. In the worksheet, click any table row to see the status of the row, including messages for any errors. The Status Viewer always shows the status of the entire worksheet.

Searches
Some integrated workbooks have searches. To search within the workbook, you must be signed in to the application. When you click the search button, the application prompts you to login if you haven’t already logged in.
Refreshes After Upload
If your changes aren't reflected after an upload, try the following to refresh the table in the application:

- Use the refresh option for the table
- Apply a filter or search on the table

Troubleshoot Desktop Integration for Excel
The application is integrated with Microsoft Excel so that, where available, you can work with records in a desktop integrated workbook. You might run into issues with the integration, for example, if you can't open the workbook that you downloaded or the workbook doesn't look right. You can use the Client Health Check Tool. For more information see Information Center: Troubleshooting Oracle ADF Desktop Integration (2012600.2) on My Oracle Support at https://support.oracle.com.

Use the Client Health Check Tool
Use the health check tool to find out what integration issues you might have and how to resolve them. Ask your help desk if you are unable to find or use the tool.

1. Download the latest version of the health check tool from How to use ADF Desktop Integration Client Health Check Tool (2010222.1) on My Oracle Support at https://support.oracle.com.
2. Run \ClientHealthCheck.exe as you would other programs on your computer, and review the result for each checked item.
3. Select any item that has a problem, and read the help text.
4. Fix some of the problems by clicking the Fix Problems button. Otherwise, follow the instructions in the help text.
5. If you need more assistance, click the Save Report As button to prepare information for your help desk.
6. Review the report and remove any sensitive information.
7. Contact your help desk and provide your report.

Attachments

How can I delete attachments?
Use the Delete icon button. Alternatively, you can use the Manage Attachments icon button to open the Attachments dialog box and delete specific attachments.

Can I view attachments in a different format?
Attachments, by default, appear in the table view. You can also view them in two other ways, list view and cards view, if the options are enabled.
To switch between the different views, click the toggle buttons on the toolbar.
How can I filter attachments?

Use the filtering options, if enabled, on the toolbar of the attachments window to display only those attachments that are specific to your search. You can filter attachments by Type, Title, Description, Category, and so on.

If you filter the attachments by Type, you get additional options to search for a specific file, folder, text, or a URL.

What happens if I update an existing attachment?

If an attachment of the same type and name is uploaded again for the record, the attachment gets stored as a new version. The previous attachment remains available, displaying the time stamp to indicate how old that version is. To view the version of an attachment for a record, click **Actions > File Revision History**.

By default, always the latest attachment appears for a particular record. However, if the option is enabled, you can pick any other version of that attachment and set it to default. Anyone viewing the attachment for that record will see the default version that you set, even if that's not the latest one.

Audit

Audit History

You can use audit history to view changes to the application data, such as the business objects that were created, updated, and deleted. You must have a role with the assigned privilege View Audit History (FND_VIEW_AUDIT_HISTORY_PRIV) to view the history or to create a report. For appropriate assignment of roles and privileges, check with your security administrator.

To open the Audit History work area, click **Navigator > > Audit Reports**.

The default search displays a summary of the audit history in the search results table. It includes key data such as date, user, product, event type, business object type, and description. For a detailed report, search again with modified search criteria. You can export the report summary to Microsoft Excel.

This table lists the search parameters used and the outcome of their selection in the detailed report.

<table>
<thead>
<tr>
<th>Search Parameter</th>
<th>Result of Selection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Object Type</td>
<td>• Narrows the search results to that specific business object within the selected product.</td>
</tr>
<tr>
<td></td>
<td>• Enables the Show Attribute Details check box.</td>
</tr>
<tr>
<td>Search Parameter</td>
<td>Result of Selection</td>
</tr>
<tr>
<td>-----------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Note:</strong> This parameter is applicable only for the business objects that belong to Oracle Applications Cloud.</td>
<td></td>
</tr>
<tr>
<td>Include Child Objects</td>
<td>Displays all the child objects that were listed for that business object when audit was set up. For example, a sales order object that contains several items as child objects.</td>
</tr>
<tr>
<td><strong>Note:</strong> Displays the objects at the immediate parent-child level only. You can view the children at subsequent levels, by selecting the child object as the business object type and search again.</td>
<td></td>
</tr>
<tr>
<td>Show Impersonator</td>
<td>Displays the details of the impersonator who modified the objects during an impersonation session.</td>
</tr>
<tr>
<td>Show Attribute Details</td>
<td>Enables the attribute list so that users can select either all attributes or a specific attribute to view the changes. Based on the selection, the search results indicate whether the attribute is created, updated or deleted, and the corresponding old and replaced values.</td>
</tr>
<tr>
<td>Show Additional Object Identifier Columns</td>
<td>Displays the instances (contexts) in which the business object was used. The context values identify the objects and the transactions in which they were used. Each context is unique and assigns a unique description to the business object.</td>
</tr>
</tbody>
</table>

**Note:** The default report displays a standard set of columns that contain prominent details of the audit history. To view additional details, you can change the display of columns.

**Types of Audit Events**

In Oracle Applications Cloud, transactional events trigger the audit process based on the create, update, and delete operations.

- **Create Operation** - This event triggers audit activity whenever business object data is created and stored in the database. The audit report displays the name of the created object, the name of the user who created the object, and the time stamp.

- **Update Operation** - This event triggers audit activity whenever the existing business object data is updated. The audit report displays both the old and updated values of the object, the name of the user who updated it, and the time stamp.

- **Delete Operation** - This event triggers audit activity whenever the existing business object data is removed from the database. The audit report displays the last value that the object attributes contained and the name of the user who deleted the object.

These events trigger the audit process and the event details are stored in the audit table. Along with audit history, you can view which events triggered the changes to the object data within a given period of time. However, for events to trigger the audit process for the business objects, you must first enable the objects for auditing.
The attributes of the audited object data can be used in lookups and foreign keys to display values in the audit history. Oracle Applications Cloud supports displaying the audited information as per the application's language settings.

For Oracle Fusion Middleware products, events such as failed sign in attempts are used as triggers. In absence of an audit table, the information is stored in the sandbox and presented only in English.

**Note:** This topic focuses on the create, update, and delete event types available in Oracle Applications Cloud. For details on events used in the Oracle Fusion Middleware products, refer to the Oracle Fusion Middleware documentation.
6 Social Network

Why should I care about social networking in my application?

Wouldn’t it be great if you could instantly share an aspect of your application with everyone who plays a part in getting the job done? Without having to start an untold number of e-mail threads that then get forwarded to other people, until it’s impossible to know who’s in charge of what?

When you share a business object with the social network - like a Sales Opportunity or a Purchase Order - you create a Social Object. With the Social Object, you can bring all your stakeholders together in a single place to get the collaborative ball rolling and keep a record of everything that has transpired. So, new folks can easily jump in and come up to speed.

What does social networking have to do with my job?

Social networking isn't just for social situations anymore.

Here are some key reasons for using social networking in your business applications:

- In a business object, open Conversations on the spot and discuss details while looking at them. No worries about keeping two sets of data synchronized. The details you see in your social network are the same you see in your business application.
- All communications are organized automatically by business object, so no wasted time with filing and searching through e-mails.
- Quickly engage resources as needed to address issues or solve problems. Invite new members to the Conversation so that they can easily see the complete history.
- Share presentations and other documents, and get inputs from other team members. Web conference not required. Juggling e-mail responses not required.
- Get real-time notifications about updates to key Conversations.
- Develop and expand your professional network.
- Connect and engage with others covering the same industry, product specialization, or geography.

Where to Find Information About Social Networking

Social networking includes many features to make collaborating on projects easier.

You can use Oracle Social Network features in:

- Oracle Engagement Cloud
- Oracle Global Human Resources Cloud
• Oracle Financials Cloud
• Oracle Procurement Cloud
• Oracle Project Portfolio Management Cloud
• Oracle Risk Management Cloud
• Oracle Supply Chain Management Cloud
• Oracle Talent Management Cloud

Get Started
• View social activity surrounding business objects.
  See: How do I get to Oracle Social Network?
• Get an overview of recent social activity, keeping you up to date on the business objects you're interested in.
  See: How do I use the Oracle Social Network user interface?
• Share a business object in the social network to enable easy collaboration with the appropriate people.
  See: How do I share or join a Social Object in the social network?

Post and Upload Content
• Start a Conversation about a business object, posting messages and sharing documents with everyone involved.
  See: How do I start a Conversation?
• Post, reply to, and like messages to participate in Conversations.
  See: How do I post a message?
• Upload documents to get comments and annotations from others.
  See: How do I upload a document?

Interact With Others
• Connect with others in the social network to follow their activity and communicate with them directly through one-on-one Conversations.
  See: How do I view a person's profile or interact with someone in Oracle Social Network?
• Create groups to make sure you include all the appropriate people in your Conversations.
  See: How do I create a group?
• Flag people to bring their attention to important messages.
  See: How do I assign flags to others?

Organize and Find Content
• Create collections to group associated business objects, Conversations, people, and groups.
See: How do I create a collection?

- Use search, hashtags, and favorites to easily find content.

See: Finding Content

**Access Your Social Activity**

- Download other clients to access your social activity from Microsoft Outlook, your desktop, or your mobile device.

See: How do I get to Oracle Social Network?
7 Scheduled Processes

Overview of Scheduled Processes

Some tasks are too complicated or would take way too long if you had to do them manually, especially one record at a time. So, you can run scheduled processes that do the task for you, for example to import data or update the status for a bunch of records. Some processes give you printable output. Those processes might have Report in their name.

Jobs and Job Sets

Each scheduled process that you run is based on a job. The job is the executable that controls what the process can do and what parameters and other options you have for the process. A job set contains multiple jobs.

Process Sets

A process set is a scheduled process that's based on a job set. So, when you submit a process set, you're running more than one job.

Note: When you submit certain scheduled processes, the job logic causes other processes to automatically run. But in this case, you're not submitting a process set that includes those other processes.

Submission

When you submit a scheduled process, you can use its parameters to control which records are processed and how. For example, a process includes only the transactions that were edited by the person you select for a Last Updated By parameter. Some processes don't have parameters.

As part of the submission, you can also set up a schedule for the process, for example to run once a week for two months. Every time a process runs, there's a unique process ID.

Output

Some scheduled processes provide output in PDF, HTML, and other formats. For example, a process can import records and also produce output with details about those records. There are many types of output, for example a tax document or a list of transactions.

Process Sets

A process set is a type of scheduled process that's based on a job set and contains at least two processes. So you can run many processes in one go, for a specific purpose. These processes run in a certain order, in serial or parallel, or by some other logic. For example, let's say we have a process set with three processes to do these three tasks:

- Validate and clean up records.
- Import the records.
- Give a report on the imported records.
What They Contain

Process sets can have any number of individual scheduled processes and even other process sets. Sometimes, a single process set has multiple process sets that are nested. For example, a process set can include three processes and two process sets, one of which contains another process set.

Submit Processes

Submit Scheduled Processes and Process Sets

Watch video

Use the Scheduled Processes work area to run all the scheduled processes that you have access to, including process sets. You can also submit many processes from other work areas. Some of the processes that give you output are also reports that you can view from the Reports and Analytics work area or panel tab. You can find that panel tab in some work areas.

It's quick to submit a scheduled process with the bare minimum steps. But there are many additional options you can set, for example, if you want to run the process on a schedule.

Select the Scheduled Process and Define Parameters

Here's what you do:

1. Click Navigator > Tools > Scheduled Processes.
3. Leave the type as Job, select the process that you want to submit, and click OK.
4. In the Process Details dialog box, enter at least the required parameters, if any.
   - Some processes have no parameters at all.
   - Some parameters depend on other parameters. For example, date range parameters might appear only after you select By Date for another parameter.
5. Click the Advanced button if you want to define the schedule, notifications, or output. Continue to the next steps. Or, just skip to the steps for finishing the submission, to run the process once as soon as possible with the default output.

Define the Schedule

Set up a schedule to run the process on a recurring basis or at a specific time. Use the Process Details dialog box in Advanced mode.

1. Open the Schedule tab and select Using a schedule for the Run option.
2. Select a frequency.
   - Select User-Defined if you want to enter the exact dates and times to run the process.
   - You can select Use a Saved Schedule to use an existing schedule, if there are any.
3. Depending on the frequency, define when the process should run.
Define the Output
You can choose the layout, format, and destination for your output. Use the Process Details dialog box in Advanced mode.

1. Open the Output tab, if available.
2. Click Add Output Document.
3. Change the name if you want. The name identifies this output document when you go to view output later.
4. Select a layout if you have more than one to choose from.
5. Select a format, for example one of these:
   - **PDF**: Is the best option if you want to print the output.
   - **Excel**: Supports embedded images, such as charts and logos, but can be opened only in Excel 2003 or higher.
   - **Data**: Gives you report data in an XML file, which is used mainly for editing the report layout.
6. Click Add Destination to send the output somewhere, for example to a printer or email address. You can add many destinations and send the output to all of them at the same time.
   - **Tip**: You can also print the output as part of the steps for finishing the submission, instead of adding a printer destination here.
7. To add more output documents, repeat steps 2 to 6.

Set Up Notifications
You can have notifications sent out depending on how the process ends. Use the Process Details dialog box in Advanced mode to set that up.

1. Open the Notification tab.
2. Click Create Notification.
3. In the Recipient field, enter the user ID of the person you want to send the notification to.
4. In the Condition list, select when to send the notification, for example when the process ends in error.
5. Click OK.
6. To send notifications to more people, repeat steps 2 to 5.

Finish the Submission
Follow these steps in the Process Details dialog box:

1. Click the Process Options button if you want to define settings that affect the data to be processed.
2. If the process gives you output and you want to print it, select the Print output check box and a printer.
3. Select the Notify me when this process ends check box if you want to get an email notification.
4. Enter submission notes to capture any information you want to associate with this submission. You can use your notes to find this submission later.
5. Click Submit.
6. Click OK to confirm.
7. Close the Process Details dialog box.

Submit Process Sets
To submit a process set from the Scheduled Processes Overview page:

1. Proceed with the steps that you would follow to submit any scheduled process, but select Job Set for the Type option.
2. In the Process details dialog box, set parameters for individual processes in the set. A process set itself doesn’t have parameters.
   a. Select a process on the Processes tab.
   b. Enter parameters for that process, if any.
   c. Repeat for other processes in the set.
3. Define the schedule, output, and notifications for the process set, as you would do for any scheduled process.
4. Set any other options and click **Submit**.

**Related Topics**
- Submitting a Scheduled Process
- View Analytics and Reports

**Examples of Process Options**

When you submit *scheduled processes*, click the **Process Options** button in the Process Details dialog box to set options such as language and time zone.

- Your settings affect the data to be processed and what you get in the output
- If the process is running on a schedule, your settings apply to every run.
- The settings override what's set in general preferences, which you can get to by clicking your user name in the global header and selecting **Set Preferences**.

Let's take a look at some examples of process options that you can set.

**Language**

You set the language process option to Spanish, while the Current Session field is set to Japanese in your general preferences. So, your output is in Spanish. If you don’t set the language process option, the output is in Japanese.

**Currency**

You set the currency process option to Euro, while your general currency preference is set to Yen. The scheduled process makes calculations based on the Euro, and the output shows all monetary amounts in Euro.

**Example of Process Details for a Process Set**

When you're submitting a *process set* with the Process Details dialog box, you can open the Processes tab to see what's in the process set. There's a list of all the jobs in the job set that the process set is based on. Every job and job set in the job set that you're submitting is considered a step and has a unique step ID.

- The **Path** column shows the step ID of the job, preceded by the step IDs of its parent job sets.

  **Tip:** If a job shows up more than once in the process set, use the path information to differentiate between those instances.

- The **Job Set** column shows the direct parent of each job in the process set.
Scenario

Let's try to understand what we are looking at in the Processes tab. Say you're submitting a process set based on a job set called Master Import, which contains a job set and two jobs, with one of the jobs showing up twice:

- Clean Records job (with a step ID of `CleanRec1`)
- Quick Import job set (`QuickImpo1`), which has two jobs:
  - Import Records job (`ImpoRec1`)
  - Clean Records job again (`CleanRec1`)

This table shows what we see in the Processes tab for this example.

<table>
<thead>
<tr>
<th>Job Definition</th>
<th>Path</th>
<th>Job Set</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clean Records</td>
<td>CleanRec1</td>
<td>Master Import</td>
</tr>
<tr>
<td>Import Records</td>
<td>QuickImpo1. ImpoRec1</td>
<td>Quick Import</td>
</tr>
<tr>
<td>Clean Records</td>
<td>QuickImpo1. CleanRec2</td>
<td>Quick Import</td>
</tr>
</tbody>
</table>

Manage Processes and View Output

Statuses of Scheduled Processes

After you submit a scheduled process, it can go through many statuses until it reaches a final state. This table explains the statuses you might see. The Action Required column tells you if something can be done for the process:

- **No (in progress):** The process was submitted and hasn't reached a final state yet. But you or administrators don't need to do anything to move the process along.
- **Yes:** You or administrators need to do something to get the process to another status.
- **No (final):** The process has reached a final state, and nothing else can be done.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
<th>Action Required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blocked</td>
<td>At least one other running process is incompatible with and currently blocking your process. The situation will be automatically fixed.</td>
<td>No (in progress)</td>
</tr>
<tr>
<td>Canceled</td>
<td>The process was canceled, and you can't restart it.</td>
<td>No (final)</td>
</tr>
<tr>
<td>Status</td>
<td>Description</td>
<td>Action Required?</td>
</tr>
<tr>
<td>------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>------------------</td>
</tr>
<tr>
<td>Canceling</td>
<td>The process is currently moving to the Canceled status.</td>
<td>No (in progress)</td>
</tr>
<tr>
<td>Completed</td>
<td>The main part of the process completed, and postprocessing (such as sending notifications and generating output) has started.</td>
<td>No (in progress)</td>
</tr>
<tr>
<td>Error</td>
<td>The process finished running and ended with errors.</td>
<td>No (final)</td>
</tr>
<tr>
<td>Error Auto-Retry</td>
<td>The process ended with errors but will automatically run again.</td>
<td>No (in progress)</td>
</tr>
<tr>
<td>Error Manual Recovery</td>
<td>The process ended with errors and requires an administrator to move the process to a final state.</td>
<td>Yes</td>
</tr>
<tr>
<td>Expired</td>
<td>The process didn't run and its schedule already ended. You can't restart it, but you can resubmit with the same parameters or submit a new process.</td>
<td>No (final)</td>
</tr>
<tr>
<td>Finished</td>
<td>The main part of the process and postprocessing has completed. The process will move on to a final state.</td>
<td>No (in progress)</td>
</tr>
<tr>
<td>Hold</td>
<td>The process is put on hold and needs someone to release it before it can continue running.</td>
<td>Yes</td>
</tr>
<tr>
<td>Paused</td>
<td>The process is paused so that another process that was automatically kicked off can run first.</td>
<td>No (in progress)</td>
</tr>
<tr>
<td>Pending Validation</td>
<td>Some validations, for example related to security, are performed on the process before it runs.</td>
<td>No (in progress)</td>
</tr>
<tr>
<td>Ready</td>
<td>The process passed validation and is about to start running.</td>
<td>No (in progress)</td>
</tr>
<tr>
<td>Running</td>
<td>The main part of the process is currently running.</td>
<td>No (in progress)</td>
</tr>
<tr>
<td>Schedule Ended</td>
<td>The process already reached a final state, and its schedule has ended.</td>
<td>No (final)</td>
</tr>
</tbody>
</table>
### View Status and Other Details for Scheduled Processes

After you submit a scheduled process, you can track its progress in the Scheduled Processes work area. Depending on what you have access to, you can also check on processes that someone else submitted. Processes can finish running in seconds, or a few minutes, or even longer. If something interrupts a process while it's running, for example a server restarting, then the process automatically picks up where it left off.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
<th>Action Required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Succeeded</td>
<td>The process successfully completed.</td>
<td>No (final)</td>
</tr>
<tr>
<td>Validation Failed</td>
<td>The process failed validation.</td>
<td>No (final)</td>
</tr>
<tr>
<td>Wait</td>
<td>The process passed validation but isn’t running yet.</td>
<td>No (in progress)</td>
</tr>
<tr>
<td>Warning</td>
<td>The process finished running and ended with a warning, for example, that a notification wasn’t sent.</td>
<td>No (final)</td>
</tr>
</tbody>
</table>
In this screenshot showing a part of the Scheduled Processes Overview page, you can see details for the selected process. In this case, the selected process finished successfully.

Let's get started. These steps are for the Scheduled Processes work area, but you can do some of the same things in other work areas where a similar section is available.

**Check the Status**

Besides finding the latest status for a scheduled process, you can get more details about its progress.

1. Click **Navigator > Tools > Scheduled Processes**.
The Search Results table shows processes that match the default saved search.

- The table might be blank if nothing was submitted.
- If submission notes were entered when submitting the process, you can use the Submission Notes column to help identify the process.

2. If you don’t see the process, click the **Refresh** icon or use the Search section to enter search criteria.

   **Note:** The table might always start out empty if you’re not on the Scheduled Processes work area. Refresh to see processes.

3. Refresh the search results at any time to see the latest status of the process in the **Status** column.

4. Do any of these tasks to check on the progress of the process:

   - For more details about the status, click the status link. For example, if a process is in the Ready status, you can click the **Ready** link in the **Status** column to see where the process is in the submission queue.
   - Check the **Start Time** column to see if the process has started running yet. If it has, you can select the row and click **View Log** to get information about how the process is running.
   - In the Search Results table, find the **This Job's Items Processed / Errors / Total** column. For some scheduled processes, this column shows what's getting processed and how things are going. For example, if the value is **Lines 50/2/?**, then this is what that means:

     - The scheduled process is processing lines, for example lines from a file that's getting imported.
     - 50 lines are successfully processed.
     - Two lines ended up in error.
     - The total number of lines to process is unknown right now. If 100 was displayed instead of the question mark, that would mean there are 100 lines in total, 52 of which are already processed, and 48 more to go.

Even after the scheduled process reaches a final state, the first two numbers might not add up to the total, for many reasons. For example, if you cancel the process before it's done, then not all items got processed. Or, you have set a process parameter to end the process if at least 50% of the items getting processed ends in error. In which case, the scheduled process itself could still successfully end, but not everything was actually processed.

### View Other Details
To get more information about a scheduled process, select it in the Search Results table and see the Details section that appears after the table. These are some of the details you might find:

- Completion text, which is automatically generated when the process reaches a final state. What you see depends on the process. For example, it might say that the process finished 1792 records in less than a second.
- The log attachment, for example for details about why the process ended in error.
- Report output that the process generated, if any.
- Parameters for the scheduled process.

  - Open the Parameter Names with Values subsection to see the parameters from the Process Details dialog box and the values that were entered when the process was submitted.
  - Use the All Parameter Values subsection for troubleshooting purposes, if you need to see the parameters and values in their actual, technical format. This subsection might have more parameters. For example, some processes run with additional parameter values that are derived from the parameter values you entered when you submitted the process.
Cancel or Make Changes to Scheduled Processes

Life is full of second chances! After a schedule process is submitted, you can still cancel it or make other changes in the Scheduled Processes work area. What you can do to the process depends on its status. Also, depending on what you have access to, you can even work on processes that someone else submitted. These steps are for the Scheduled Processes work area, but you might be able to do some of the same things in other work areas where a similar section is available.

Make Changes to Processes

Select the scheduled process in the Search Results table.

- If the process hasn't started running yet, you can still use the Actions menu to change the schedule or output.
  - Edit Schedule: Change the submission schedule, for example to submit it biweekly instead of weekly.
  - Edit Output: If the process generates output, you can change output options, for example from HTML format to PDF.
- If the process is running, you can click Put On Hold to pause it, or Release Process so that a process that's on hold continues to run.

Cancel a Process

Select the scheduled process in the Search Results table, and click Cancel Process. Sometimes it takes a while for a process to finish canceling. So, you can use the Actions menu to end it. The option you get depends on the process.

- Hard Cancel: To end the process shortly after you canceled it, without waiting for the cancellation to finish by itself.
- Force Cancel: To end a process that has been canceling for over 30 minutes but isn't done yet.

Some processes run on a remote server. When you click Force Cancel, even though the status is changed to Canceled, the process might still be running on the remote server. With the scheduled process still selected in the Search Results table, you check the status of the remote process in the Details section that appears after the table. The Remote Status field might display any of these statuses for the remote process (not for your scheduled process):

- Completed Successfully: The remote process was successfully canceled within the 30 minute grace period.
- Running/Unknown: Your scheduled process is in a Canceled state, but the remote process is still running.
- Terminated: Your scheduled process is in a Canceled state, and the remote process is successfully canceled after the 30 minute grace period.

Cancel Processes in Bulk

You can cancel up to 100 processes at once, as long as the processes haven't reached a final state.

1. Click Navigator > Tools > Scheduled Processes.
2. In the Search section, select Cancelable Processes from the Saved Search list.
3. Make sure that what you get in the Search Results table meets these requirements:
   - No more than 100 processes
   - Only processes with a cancelable status:
     - Wait
     - Ready
- Running
- Completed
- Blocked
- Hold
- Paused
- Pending Validation
- Schedule Ended
- Error Auto-Retry

4. Use the Search section to change your search results, if you need to.
5. Select **Cancel Processes in Bulk** from the Actions menu.

## View Output from Scheduled Processes

Other than processing records, some scheduled processes also give you output. When you submit the process, you can select the output layout and format, and set other output options. In the Scheduled Processes work area, you can view the output and even republish it in a different format without resubmitting the process. To view the output on other pages, use the **View Output** column in the table where you monitor submitted processes.

### View and Republish Output

Here’s what you do:

1. Click **Navigator > Tools > Scheduled Process**.
2. Find your scheduled process and, if you need to, refresh the search results to see the latest status.
3. Select the scheduled process.
4. Go to the Output subsection in the Details section.
5. Click the link in the **Output Name** column to view or download the output, which you can then print.
6. To view or export the output in a different format:
   a. Click the **Republish** button.
   b. Click the **Actions** icon.
   c. Select **Export**, and then select a format.

   **Tip:** If you want the Data format, you can just click the XML Data icon instead.

### Related Topics

- **Submitting a Scheduled Process**

## Resubmit Scheduled Processes and Process Sets

You can easily resubmit scheduled process using the exact same parameter values, if the process has a Succeeded status and wasn’t part of a submission involving other processes. For process sets, you can also resubmit after changing any of the parameters or other options. These steps are for the Scheduled Processes work area, but you can resubmit in other work areas where a similar section is available.
Resubmit Processes

To resubmit scheduled processes using the same parameters:

1. Click Navigator > Tools > Scheduled Processes.
2. In the Search Results table, select your process and take a look at its details, including parameter values.
3. Click Resubmit.

Resubmit Process Sets

To resubmit process sets using the same or different parameters:

1. Click Navigator > Tools > Scheduled Processes.
2. See process details, including parameter values, for the processes that ran as part of your process set.
3. In the Search Results table, select your process set.
4. Click Resubmit, and you’re done. Or, click the Resubmit drop-down button and select Resubmit with Changes.
   a. In the Process Details dialog box, select a process on the Processes tab.
   b. Change any of the parameters.
   c. Repeat and change parameters for any of the other processes in the process set.
   d. Define anything else as part of the submission, for example the schedule.
   e. Click Submit.

FAQs for Scheduled Processes

Why are scheduled processes shown in a hierarchy?

A scheduled process with child nodes might be a process set. The hierarchy shows you the structure of nested processes or process sets within that process set.

Or, when a scheduled process runs, it might cause other processes to run automatically, so those other processes are the child nodes under the original process.

How can I export search results for scheduled processes to a spreadsheet?

Here’s what you do:

1. Click Navigator > Tools > Scheduled Processes.
2. On the Overview page, expand the Search section and run your search.
3. If you’re happy with the search results, click the Download Results button in the Search section.
4. In the Download Results dialog box, select the number of records you want to export.
5. Select the Include Job’s item count check box to include the This Job’s Items Processed / Errors / Total column in the spreadsheet.
6. Click Download.

Tip: If you see any difference between the spreadsheet and the Search Results table, refresh the table and then compare again.
Overview of Analytics and Reports

In business intelligence, you analyze data to gain insight that you can act on and gather information to meet specific requirements. You can use different types of predefined analytics and reports or create and edit them to support your business needs.

Analyses, Dashboards, and Reports

There are three main objects you use to analyze your data and business.

<table>
<thead>
<tr>
<th>Object</th>
<th>What It Displays</th>
<th>What You Use It For</th>
</tr>
</thead>
<tbody>
<tr>
<td>Analysis</td>
<td>Data in an interactive format, for example a table or graph.</td>
<td>Summarize or break down simple, real-time data, which helps you in taking short-term decisions.</td>
</tr>
<tr>
<td>Dashboard</td>
<td>A collection of analyses and other content, presented on one or more pages, or tabs.</td>
<td>Get various pieces of information about a particular subject.</td>
</tr>
<tr>
<td>Report</td>
<td>Data in a predefined format that provides little or no interaction.</td>
<td>Get high-volume data in a high-fidelity output optimized for printing, for example in documents to support internal operations, statutory requirements, and other business needs.</td>
</tr>
</tbody>
</table>

Note: You can export tables on UI pages to Microsoft Excel workbooks, where available, and use the exported data for analytical purposes.

For more information, see the Creating and Administering Analytics and Reports guides and the Using Analytics and Reports guides (if available) for your products.

Create and Edit Analytics and Reports

You can create and edit analytics and reports for your own use, or make changes to objects for others, if you have the appropriate roles to do so.

Here are a few examples of the changes you can make.

- Add or remove columns from an analysis.
- Change the branding logo on report output.
• Create a dashboard to include your most commonly viewed analyses.

For more information about creating and editing analytics and reports, see the Creating and Administering Analytics and Reports guides for your products.

Related Topics
• Reports and Analytics Work Area and Panel Tab

View Analytics and Reports

You can view analyses, dashboards, and reports on the pages and infolets you usually work with, or navigate directly to them in the business intelligence catalog using the Reports and Analytics work area and the Reports and Analytics panel tab. You can also view analytics in infolets.

View Analytics in Infolets

Use your favorite infolet pages to find analytics.

1. Explore frequently used infolet pages using the page controls and Previous and Next icons.
2. You may find analytics displayed in infolets with summaries and aggregations or performance metrics.
3. Click an infolet to open a detailed report, for example to view the details of transactions that are aggregated as a total.
4. Click Done to return to the infolet page.

View Objects in Familiar Work Areas and Pages

Use analyses, dashboards, and reports available in the pages and work areas you usually work with.

1. Explore frequently used pages, where you may find one or more analyses and reports available as links or embedded in parts of the page, including tabs or panel tabs.
2. Some work areas have a Reports and Analytics panel tab, in which you can explore the catalog folders for analyses and reports specific to the work area and, if you have permission, map additional objects to the work area.
   a. Open the panel tab.
   b. Expand the Shared Reports and Analytics folder and explore the available content.
   c. Click the link for any object and see its type to determine whether it’s an analysis, a report, or a dashboard.
   d. Click View to view the object.

View Objects in the Reports and Analytics Work Area

Use the Reports and Analytics work area to search or browse the catalog and view any analysis, dashboard, and report you have access to.

1. Click Navigator > Tools > Reports and Analytics.
2. Filter and search for objects:
   a. Optionally, select from the filter list to refine results by object type.
   b. Enter a name or partial name and click Search. To view objects you have marked as favorites, select Favorites in the list. Select Recent Items to view objects you have recently worked with, or a recent search to run it again.
   c. In the search results, use the icons to identify the type of the objects.
   d. Locate an analysis, dashboard, or report and select it, then click More and select View.
3. In the catalog breadcrumb, you can also browse the catalog folders for analytics and reports.
   a. Click the Hierarchical Selector for All Folders and click My Folders or Shared Folders to explore their subfolders or contents to locate objects.
   b. Click More for an object, and then select View to open it, or Edit to modify it.

**View Analyses**

An analysis queries against your company's data and gives you answers to your business questions. Analyses are visualizations, such as charts and tables, of a specific set of data, and may appear in your frequently used pages, or as components of a dashboard.

To view analyses:

1. From the catalog folders or search results, open an analysis to view.
2. Click Refresh to rerun the analysis and refresh its data.
3. Click Print and select either Printable PDF or Printable HTML to open a printable version of the analysis.
4. Click Export to export analysis data in various formats, for example PDF, Excel, PowerPoint, and XML.

**Use Dashboards to View Grouped Analyses**

Dashboards are a collection of analyses grouped together to return data. A dashboard contains analyses, prompts which filter information, and other objects that are presented on one or more pages.

1. From the catalog folders or search results, open a dashboard to view.
2. If available, select values for dashboard prompts to filter the dashboard.
3. Click Apply to refine the results of all of the analyses in the dashboard.

**View Reports**

Reports show data in a predefined format that's optimized for printing.

1. From the catalog folders or search results, click a report's name to view it.
2. Click the View Report icon.
   - Choose whether you want the report displayed as HTML or PDF for printing. Because it's optimized for printing, often PDF provides the best print results.
   - You can also export the report as RTF for editing in a word processor, or as Excel or PowerPoint.
3. From the catalog folders or search results, you can also:
   - Click Edit to edit the report properties, layout, and data model.
   - Click Report History to view details about when the report was submitted in the past.
   - Click Schedule to schedule the report to be run.
Where to Find More Information About Analytics and Reports

Here are some resources to help you get started.

- In the Oracle Help Center, review videos, guides, and other resources for using and creating analytics and reports.
  - ERP
    - See: Financials Reports and Analytics
    - See: Procurement Reports and Analytics
    - See: Project Portfolio Management Reports and Analytics
  - HCM
    - See: Global Human Resources Reports and Analytics
    - See: Talent Management Reports and Analytics
  - Engagement
    - See: Engagement Reports and Analytics
  - SCM
    - See: Supply Chain Management Reports and Analytics
- For lists of predefined reports and analytics, see the Analyze and Report page for your cloud services in the Oracle Help Center (http://docs.oracle.com).

Related Topics
- Oracle Help Center
# Personalization

## Springboard

### How can I personalize the page entries on my home page?

You can personalize the home page content that you use to navigate in the application. Based on your requirements, you can show or hide the groups and page entries that appear on the home page for navigation. You can't personalize the content of the Navigator.

If your default home page layout is:

- Panel or banner, click the Personalize Springboard icon on the home page, and select or deselect the groups and page entries that you want to show or hide on the springboard.
- News feed, click the Personalize Springboard icon in the Apps section of the home page, and select or deselect the page entries that you want to show or hide in that section.

**Related Topics**

- Overview of Configuring Themes and Home Page Settings
- Sign In and Get Started

### How can I reset the personalizations I made to page entries on my home page?

Use the reset option available on the page specified in the following list. If your default home page layout is:

- Panel or banner, click Reset to Default on the Personalize Springboard page.
- News feed, click Reset on the Apps page.

### What happens if I reset the personalizations I made to page entries on my home page?

You return the visibility settings of the groups and page entries to their default values, which removes any changes to the settings.

## Infolets
Personalize Infolets

Use infolets to aggregate key information for a specific area, for example, social networking or your personal profile. On the home page, to open infolets and view important information at a glance, you can:

- Click an icon in the page control, if your default home page layout is panel or banner.
- Click a tab in the Analytics section, if your default home page layout is news feed.

Note: If the infolet icons aren't available on the home page, administrators can enable infolets using the Home Configuration page of the Structure work area.

You can:

- Edit infolet titles and views.
- Move infolets.
- Hide or show specific infolets on an infolet page.

Edit Infolet Titles and Views

Follow these steps:

1. Click the Actions icon on the top right corner of the infolet, and select Edit Title and Views.
2. Edit the infolet title, and enable or disable the infolet views.
3. Click Save and Close.

Reorder Infolets

To change the position of an infolet within an Infolet page, follow these steps:

1. Click the Infolet Repository icon, and select Reorder Infolets.
2. In the Reorder Infolets dialog box, select the infolets, and use the arrows to reorder them.

Tip: To select multiple infolets, press the Ctrl key, and then select them.

3. Click Apply.

Hide or Show Infolets

To hide an infolet from an infolet page, click the Infolet Repository icon, and deselect the infolet from the list of infolets.

Tip: Alternatively, click the Actions icon on the top right corner of the infolet, and select Hide.

To show a hidden infolet on an infolet page, click the Infolet Repository icon, and select the infolet from the list of infolets.

Related Topics

- Configure Home Page Navigation
- Why is the icon for my infolet page not available in the page control on the home page
How You Use and Personalize Infolets in Oracle SCM and Procurement Cloud

Oracle Supply Chain Management (SCM) and Procurement Cloud infolets are visual, actionable, and personalized information cards summarizing critical data about specific objects. These infolet cards are combined in a SCM or Procurement home experience or work area home page to make key performance indicators easy to view, understand, and act upon.

You can do the following with infolet cards:

- Flip or expand the card to view additional details about the object featured in the infolet card.
- Drill down to more details by navigating to relevant manage pages from the infolet view.
- Change the context of the card either at page level or at view level.
- Hide infolet cards.
- Reorder infolet cards.

Flip and Expand Card

Some infolet cards have a back view or an expanded view that provides additional information relevant to specific aspects of the object being featured in the infolet card. The back and expanded views of the infolet card display additional levels of detail and expose useful information relevant to the object. Based on how the infolets have been configured, you can then navigate to either the back view or the expanded view.

To see different views of the infolet card, do the following:

- Click the **Back View** icon present on the infolet card to see the back view with additional information about the object.
  - To return to the front view, click the **Front View** icon present on the infolet card.
- The expanded view is available from either the front view or the back view. Click the **Expanded View** icon to see useful information about the objects. Click the **Front View** or **Back View** icon to return to the view you started with.

Additional Pages

Click the number or an element like a segment on the pie chart of the infolet card to navigate to relevant manage pages with additional, in-context information. Drill down to view additional relevant information on related objects that will help you to act on the latest and critical data points. For example, suppose you have an infolet card that displays draft orders with errors. Each number or the segment of the graphical element represents the different error conditions such as pricing errors, processing constraint errors, and so on. Click the segment that represents draft orders in pricing errors to see the names and additional details of all the draft orders with pricing error.

Context Selector

To view different perspectives of the same data, use context selectors. Two types of context selectors are available: at the page level, and at the view level. Only some of the infolet cards have the view-level context selectors, while only some pages with infolet cards have page-level context selectors. Context selectors aren't present on all infolet cards and...
pages. If you change the context of the card on any view of the card, these changes may not necessarily reflect on the alternate views of the infolet card.

- Each view of the infolet card may have a view-level context selector located after the title of the card. Select from the list of available contexts and the view is updated based on that context. The view-level context can be different on each view of the card.

  For example, you may have an infolet card that displays information about fulfilled orders for different time periods. Use the context selector to see information about orders that were fulfilled in the last three months.

- The page-level context selector is available on a tool bar of the page. The page-level context selector is similar to the view-level context selector, except that all the cards on the page will display data as per the filters set in the page-level context list. Click the View By icon on the tool bar of the page. Select the contexts from the two available lists in the Page Context dialog box.

  Examples include updating all of the cards to show data only for the last week, or only for a particular business unit.

**Hide Card**

Click the Actions icon present on the infolet card, and select Hide. The selected card is hidden. You can also hide cards by clicking the My Infolets icon present on the page. A list of infolet cards is displayed. Deselect the check box of the infolet card that you want to hide.

**Rearrange Cards**

The infolet cards can be moved around and can be rearranged or re-ordered on the page in any way you want.
10 Preferences

How can I set general preferences for myself?

Use the General Preferences section in the Set Preferences work area to set your general preferences. Click Navigator > Set Preferences. You can set the general preferences such as language, currency, time zone, accessibility and watchlist.

Related Topics

- How can I set general preferences for all users

What's the display name language preference?

It's the setting that displays all person names including your own name in the global header, in a specific language. For example, if your display name language is Spanish and your name is Alexander, then you see your name as Alejandro.

If the equivalent of a name doesn't exist in the preferred display language, or if the display language isn't set, then the user names are displayed in the preferred default language.

Change Your Photo

People can see your profile photo on your public information page, in the directory search results, and the global header. You can have only one profile photo at a time.

1. In the Personal Information work area, hover over the image or name. Click Update Photo (camera icon).

   **Note:** You may also update your photo using the My Photo page in general preferences. Click the image or name in the global header and go to Personalization > Set Preferences > My Photo

2. Click Browse and select the photo to upload. Keep these points in mind when selecting the photo:
   - The file size should be less than 2 megabytes.
   - The preferable file format is .png or .jpeg though other image file formats are also supported.
   - Ensure that the image dimension is 90 x 120 pixels to avoid distortion. If the image isn't of this dimension, try maintaining an aspect ratio of 3 x 4.

3. Click Save and Close.
Set Up the Accessibility Modes

You can configure the accessibility modes on the General Preferences: Accessibility page.

Procedure

Follow these steps:

1. In the global header, click your user image or name and select Access Accessibility Settings.

   **Tip:** You can also find the Accessibility icon in the global header using the Tab key.

2. If you rely on screen reader assistive technologies, switch to the Screen Reader mode. Selecting this mode changes several aspects of the user interface. For example, tree components have additional columns that you can use to select specific tree nodes.

3. Select additional options according to your preferences:
   - If you run your operating system in a high contrast mode such as black on white, switch the color contrast to **High**.
   - If you run your operating system in a font size greater than 100% of normal size, switch the font size to **Large**.

4. Click **Save**.

High Contrast Mode and Accessible Themes

High contrast mode works well when applied to any of the accessible themes in the application. The available accessible themes are:

- Autumn Red
- Bright Blue
- Crisp Green
- Crisp Green Banner
- Dark Gray
- Dusty Blue Banner
- Light Blue
- Midnight Blue
- Sky Blue
- Sky Blue Banner
- Steel Gray
- Turquoise
- Vanilla

Related Topics

- Accessibility Features
- Overview of Application Accessibility
Change Your Password

After you sign in, you can change your password for better security.

1. Click your user image or name in the global header, and on the Settings and Actions menu, select Set Preferences.
2. In the General Preferences section, click Password, and enter your password details.
3. Click Save and Close.

Proxies

Overview of Proxies

Let's say you're on vacation or busy with work, but you want to take care of some tasks. You can designate a proxy so that someone else can sign in and do the tasks on your behalf in an impersonation session.

How Impersonation Works

Your proxies can sign in using their own passwords, and start an impersonation session. They have unrestricted access to your account, except that they can't change your preferences. By default, everything your proxy does is audited. If a business object isn't set up for audit, your proxy can't work on the business object. So you can ask your administrator to disable auditing using the Audit Impersonation Transaction Enabled (FND_AUDIT_IMPERSONATION_TRANSACTIONS) profile option.

When you sign in, you can see all the work your proxy did for you. Also, you and your proxy can sign in and work at the same time.

Note: If you're an HCM Cloud user, remember that your proxies will have access to your personal and sensitive information, such as your salary details, national IDs, and so on.

Designate Proxies

Here's how you can designate a proxy to work on your behalf.

1. Click your user image or name in the global header, and on the Settings and Actions menu, select Set Preferences.
2. Click Proxies.
3. Click Actions > Create.
4. Search for the person you want to designate as your proxy.

Note: If you can't find the person you want to designate as a proxy, ask your administrator to check if the person has the Impersonate User (FND_IMPERSONATE_USER_PRIV) privilege.

5. Verify the user details and click Apply.
6. Click OK.
7. Select the start and end dates.
8. Click Save and Close.

Related Topics
- Work as a Proxy

Why can't I find a specific person to designate as my proxy?

That's because the person you want to designate as a proxy doesn't have the Impersonate User (FND_IMPERSONATE_USER_PRIV) privilege. Ask your administrator to assign the privilege to that person.

Note: If you're an HCM Cloud user, remember that your proxies will have access to your personal and sensitive information, such as your salary details, national IDs, and so on.

Watchlist

Show or Hide Watchlist Items

Use the Watchlist page in the Set Preferences work area to show or hide specific items or categories in your Watchlist.

The preferences contain:
- All the predefined Watchlist categories and items available to you
- Any saved searches you're using as Watchlist items

Set Watchlist Preferences

Follow these steps:
1. Click your user name or image in the global header, and go to Personalization > Set Preferences > Watchlist.
2. Use the Enabled check box to show or hide any Watchlist item or category.
   
   Note: Disabling a category automatically hides all of its items.

3. Optionally hide enabled Watchlist items that show no records.

Related Topics
- How can I rename Watchlist items
- Create Watchlist Items
- Why is the count different between a Watchlist item and the page that the item link takes me to

Why are some items not displayed in my Watchlist?

Items might be hidden based on your Watchlist preferences. These preferences also apply to saved searches that you're using as Watchlist items. To review your preferences, select your user name or image in the global header, and go to Personalization > Set Preferences > Watchlist.
Other possibilities could be that:

- You deselected saved searches in the Manage Watchlist dialog box, so they're no longer used as Watchlist items.
- You deleted saved searches that were used as Watchlist items.
- Your administrator disabled specific predefined Watchlist items or categories for all users.
- Your administrator disabled using saved searches (from specific pages) as Watchlist items.
- Your administrator revoked access to tasks or pages that used to be available to you.

In these cases, you can no longer see the corresponding Watchlist items in your Watchlist and in your Watchlist preferences.

**Related Topics**

- Create Watchlist Items
11 Help

Get Help in the Application

Watch video

We all can use a helping hand sometimes. To get help for what you're working on, use the help icons that are on many of the pages you use. The icons open help windows that can have informational text, links to help content, or both, and maybe even help that your company added.

Use Help Windows

Here's what you do:

1. If you don't see any help icons, click your user image or name in the global header and select Show Help Icons. You reveal any icons on your current page, but not all pages have help icons.
2. Click a help icon. If the icon isn't next to the page title, then the help window gives you information specific to the part of the page that the icon is on.
3. On the help window, click any of the links available.
   - You see help links in your preferred language only if there's content in that language. If not, you see links in English.
   - Help content opens in a new browser tab so you can keep that open while you work.
   - You can do more with the help than just read it. Options can include printing, downloading, bookmarking, or emailing the help.

Browse and Search for Help

Most of the links open guides in the Oracle Help Center. You can use the Table of Contents tab to move around in the guide for other information.

To search within a guide:

1. Open the Search tab.
2. With the Search this book option selected, enter your keywords and run the search.
3. In the new browser tab showing the search results, find the entry you want and click one of the two links for that entry.
   - The first link takes you to the beginning of the relevant chapter.
   - The second link takes you directly to the part of the chapter that contains the summary text that you see in the search result.

Tip: To open the Oracle Help Center at any time, click your user image or name in the global header and select Applications Help.

Related Topics

- Oracle Help Center
Find Your Way Around the Oracle Help Center

Watch video

The Oracle Help Center (https://docs.oracle.com) has guides, videos, information about releases and updates, and other resources for Oracle Applications Cloud. In the application, when you click links in help windows, most of the time you open a specific guide in the Help Center. From there, you can search or browse to find other content. Let's take a look at how you can move around and find what you're looking for in the Help Center.

Browse for Content
To find guides and other materials for a specific cloud service:

1. In the Oracle Help Center, open the main menu and click **Cloud Applications**.
2. Click the name of your cloud service. This is also your starting point if you got to the Help Center by clicking your image or user name in the **global header** and selecting **Applications Help**.
3. Select a release update for the cloud service, if you need to.
4. Get to a specific guide, video, or other resource.

   - Here are some examples of where you might go on the cloud service page to browse for information:
     - Learn What's New panel: Get information about new features and other changes for the release update.
     - Tasks section in the navigation pane: Click a task category and then a specific task, to open the guide that covers the task.
     - REST API section in the navigation pane: Get reference information about REST APIs.
   - Click the **Videos** or **Books** link in the navigation pane to get all the videos or guides for the cloud service.

   - On the Videos or Books page, you can use the **View** list to filter by category.
   - Most guides are available in multiple formats, for example HTML and PDF.

Tip: Use the breadcrumbs to get to other parts of the Help Center.

Search for What You Want
The scope of the search depends on the page you're on in the Oracle Help Center. For example, on the Cloud Documentation page, you search across all cloud services in Oracle. On the pages for a specific cloud service, you search only within that service.

Related Topics
- Oracle Help Center
12 Troubleshoot

Troubleshoot Issues

When you run into issues that you can't easily fix yourself, you can follow a general process to troubleshoot the issue. This process can involve error messages, diagnostic tests, recordings of the issue, and your help desk.

To troubleshoot issues, follow these steps:

1. If you get an error message, especially for a system or application error, the message might say that your help desk was notified. If so, then an incident is automatically created and sent to your help desk.
   Or, the message might advise you to contact the help desk yourself. Either way, note down the message ID that appears after the message text, and the incident ID (if any).
2. Run diagnostic tests if you have access to do so and can find tests relevant to your issue. Click your user image or name in the global header to open the Settings and Actions menu, and select Run Diagnostic Tests.
   If you can't run diagnostic tests, or can't resolve the issue after looking at test results, then go to the next step.
3. Contact your help desk and provide the IDs you noted in step 1, any diagnostic test results, and anything else related to your issue.
4. If your help desk asks you to reproduce and record your issue, then click your user image or name in the global header to open the Settings and Actions menu, and select Record Issue.
5. After you finish recording, note down all the information about your recording (for example the recording ID) and send it to your help desk.
6. Continue working with your help desk to resolve your issue.

Diagnostic Tests

Run Diagnostic Tests

Use the Diagnostic Dashboard to identify and resolve issues within your application. You can run and monitor diagnostic tests and review the test results using the Diagnostic Dashboard.

To run a diagnostic test, ensure that your user account is associated with one of the following job roles:

- Application Diagnostics Regular User (ORA_FND_DIAG_REGULAR_USER_JOB)
- Application Diagnostics Advanced User (ORA_FND_DIAG_ADVANCED_USER_JOB)
- Application Diagnostics Administrator (ORA_FND_DIAG_ADMINISTRATOR_JOB)

To run a diagnostic test, do the following:

1. Click your user image or name in the global header, and from the Settings and Actions menu, select Run Diagnostic Tests. If you don't see this menu item, then your help desk can make it available to you.
2. In the Search for Tests or Search for Tags panes, search for and identify the diagnostic tests that you want to run.
3. From the search results, select the check box for the diagnostic test and click **Add to Run**. The selected test is added to the Choose Tests to Run and Supply Inputs table.

4. In the Choose Tests to Run and Supply Inputs table, depending on the value that appears in the Input Status column, perform the appropriate action. This table lists the values that may appear in the Input Status column and the appropriate actions for each value:

<table>
<thead>
<tr>
<th>Input Status</th>
<th>Action</th>
</tr>
</thead>
</table>
| Required Input Values Missing                     | a. Click the **Click to Supply or Edit Input Parameters** icon in the Input Status column. In the Input Parameters dialog box, specify the parameter values according to the parameter type.  
   b. Click **OK**.                                                                 |
|                                                  | **Note:** To skip that test and its nested test steps, deselect the **Select to Run Test** check box in the Choose Tests to Run and Supply Inputs table. |
| Required Input Values Validated or Input Values Validated | If you want to change an existing input parameter, or check the parameter values the test is currently set to use:  
   a. Click the **Click to Supply or Edit Input Parameters** icon in the Input Status column.  
   b. In the Input Parameters dialog box, review the existing parameters or specify new input parameters, as applicable.  
   c. Click **OK**. |
| No Inputs Specified                                | Proceed to step 4.                                                                         |

5. From the **View** menu in the Choose Tests to Run and Supply Inputs table, select **Availability**.

6. In the Diagnostic Test Availability dialog box, from the Select the Diagnostic Test for Details table, select each test and check the icon displayed the Availability column.
   - If the Availability column displays a check mark icon, then the selected test is currently available to be run.
   - If the Availability column displays a warning icon, or if you want to determine whether the test is internal or external, click **Detach** in the Available Details table header, and proceed to the next step.

   If all the listed tests are available to be run, and you don't need to know whether they're internal or external, proceed to Step 8.

7. In the detached table:
   - If the Details of Required Test Components column contains the name of an Oracle Fusion application, then the test is an internal diagnostic test. Otherwise, it's an external diagnostic test.
   - If the Error column contains an error message, take appropriate action to correct it.

8. Repeat steps 4 through 6 to verify that all listed tests are now available to run, and proceed to the next step.

9. Optionally, you can enter a name for your test run in the **Run Name** field in the toolbar of the Choose Tests to Run and Supply Inputs table. If you use the word **error**, or if you leave the **Run Name** field blank, the application automatically assigns the test run a name.

10. From the **Run Options** menu, select the appropriate options depending on how you want the selected diagnostic test or tests to run. This table lists the options available in the **Run Options** menu, and describes the consequences of selecting each option.
### Run Option

<table>
<thead>
<tr>
<th>Run Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Run Now</td>
<td>Runs the selected test or tests immediately after you click Run.</td>
</tr>
<tr>
<td>Run Later</td>
<td>Schedules when the test or tests are run, if this option is available.</td>
</tr>
<tr>
<td></td>
<td>When you select Run Later, the Run button on the toolbar changes to a Schedule Run button. Complete the following steps to schedule when the test or tests will be run:</td>
</tr>
<tr>
<td></td>
<td>a. Click the Schedule Run button.</td>
</tr>
<tr>
<td></td>
<td>b. In the Schedule Tests dialog box, click the Schedule tab and select Use a Schedule.</td>
</tr>
<tr>
<td></td>
<td>c. From the Frequency menu, select how often to run the selected test or tests.</td>
</tr>
<tr>
<td></td>
<td>d. In the Start field, specify the date and time at which to start testing.</td>
</tr>
<tr>
<td></td>
<td>e. Click Submit.</td>
</tr>
<tr>
<td>No Prerequisites</td>
<td>Runs the selected test or tests without running the prerequisite tests.</td>
</tr>
<tr>
<td>Run in Parallel</td>
<td>Runs the selected test or tests using multiple threads. The default value is 3, and you can select any value from 2 through 5.</td>
</tr>
<tr>
<td>Run Synchronously</td>
<td>Runs the selected test or tests using a single thread.</td>
</tr>
</tbody>
</table>

11. Click Run.

### View the Status and Result of a Diagnostic Test

Use the Diagnostic Dashboard to check the status and view the results of a diagnostic test. You can review information about whether tests or test runs completed successfully, and if they detected any problems.

#### Check the Status of a Diagnostic Test

To check the status of a diagnostic test using the Diagnostic Dashboard:

1. Click your user image or name in the global header, and from the Settings and Actions menu, select Run Diagnostic Tests. If you don't see this menu item, then your help desk can make it available to you.
2. After running a diagnostic test using Diagnostic Dashboard, you may need to click Refresh to display the latest status information.
3. Click the Run Status link in the Tasks pane.
4. If you want the Diagnostic Test Run Status table to display only certain types of rows, select the pertinent option from the Find list.
   Alternatively, click the Search Test Runs icon to search for specific rows in the Diagnostic Test Run Status table.
5. Expand the test run nodes to view the list of executions for each test.
6. In the Diagnostic Test Run Status table, review:
   - Execution Status: This column displays status information about whether tests and test runs have completed or encountered errors.
Diagnostic Status: This column displays status information about whether the individual diagnostic tests detected any problems before completing.

View the Result of a Diagnostic Test
To view the results of a diagnostic test, click the View Test Results icon in the Report column. You can review all the details pertaining to that test.

Cancel an Initiated Diagnostic Test
Use the Diagnostic Dashboard to cancel a diagnostic test that's running.
To perform this task, ensure that you have one of the following roles:

- Application Diagnostics Regular User (ORA_FND_DIAG_REGULAR_USER_JOB)
- Application Diagnostics Advanced User (ORA_FND_DIAG_ADVANCED_USER_JOB)
- Application Diagnostics Administrator (ORA_FND_DIAG_ADMINISTRATOR_JOB)

You need the Applications Diagnostic Administrator (ORA_FND_DIAG_ADMINISTRATOR) job role to cancel tests that someone else ran.

To cancel a diagnostic test using the Diagnostic Dashboard, do the following:

1. Click your user image or name in the global header, and from the Settings and Actions menu, select Run Diagnostic Tests. If you don't see this menu item, then your help desk can make it available to you.
2. Click the Run Status link in the Tasks pane.
3. In the Diagnostic Test Run Status table, verify that the Execution Status for the test you want to cancel is Running.
4. Select the test you want to cancel and click Cancel.

Run Diagnostic Tests to Verify, Troubleshoot, and Analyze
When you encounter an issue, you can try to diagnose it yourself by running diagnostic tests, before following up with your help desk. You can also use diagnostic tests to take preventive measures and identify potential issues before running into real problems.

Note: You can run diagnostic tests only if you have roles that let you do so.

Health Check
This example shows running a diagnostic test to verify that data is correct before starting a large-volume task.

1. You are a general ledger manager, and you periodically run diagnostic tests to check on data, setup, and configurations, especially before closing the period.
2. You open the Diagnostic dashboard and run the General Ledger Misclassified Accounts Validations test, to make sure that all accounts are correctly classified.
3. You review the test results and confirm that the accounts are ready for the period close process.
Troubleshooting
This example shows running a diagnostic test to start the troubleshooting process.

1. You are a general ledger manager, and you run into issues with the period close process.
2. You open the Diagnostic dashboard and search for diagnostic tests using tags, with Financial Control and Reporting as the tag name.
3. You browse the search results for tests with Close Ledgers as the tag value.
4. You find and run the appropriate test, General Ledger Closing Validations.
5. The diagnostic test results can show issues that you can’t fix yourself: validation errors in setup, configuration, or data integrity. In this case, it’s incomplete accounting setup.
6. You notify your help desk about the diagnostic test results and describe your issue.
   If the test results had shown issues that you can’t fix yourself, but didn’t have validation errors, then you would ask your help desk to create an incident. The help desk would take over in the troubleshooting process.
7. Your help desk performs a fix and asks you to rerun the test.
8. You repeat steps 4 through 7 until the test completes with no issues identified.

Data Analysis
This example shows running a diagnostic test to collect data for analysis.

1. You are a purchasing buyer, and you notice unexpected data in a specific purchasing document.
2. You search in Applications Help for information related to purchasing documents, to see if you can find any relevant troubleshooting information. You find a list of predefined diagnostic tests, and you check if there is a relevant diagnostic test.
3. You open the Diagnostic dashboard and run the appropriate test, Manage Purchasing Documents Lifecycle - Validate.
4. You review the test results, which give you all the details about the particular purchasing document.
5. You see the reason for the unexpected data and resolve the issue yourself.

Analyze User Session at Run Time
Use the Application User Session Run Time diagnostic test to analyze a user's session. A session starts when users signs in and ends when they sign out.

Run this test from the Diagnostic dashboard. Click your user image or name in the global header and go to Troubleshooting > Run Diagnostic Tests.

Application User Session Cookie
Enter the cookie to identify the user session that you want to analyze.

To get the session cookie value:

1. Run the Application User Session Configuration diagnostic test to make sure that the ApplSession configuration values for your application are correct.
2. Use a valid user name and password to sign in.
3. Display the list of cookies in your browser, according to instructions for the browser.
4. In the cookies listed for your domain site, select the cookie named ORA_FND_SESSION_<DATABASE_SID>.
   - Your domain site is the host in the URL, for example oracle.com in the URL http://example.oracle.com.
   - <DATABASE_SID> is your database session ID.
If you can’t locate the cookie, then no application user session has been created for your application.

5. See the Content field, which has the format pillar_name:session_cookie_value:timestamp. For the Application User Session Cookie parameter, enter the session_cookie_value part, which appears between two colons.

Record Issues to Troubleshoot

To help your help desk troubleshoot issues that you encounter in the application, you can record the issue while you reproduce it. Not only would the recording show your help desk what happened, but it also collects detailed data that your help desk can analyze. You can also attach additional notes and material, such as screenshots, to most recordings.

Create a Recording

Follow these steps:

1. Open the page where your issue occurred. If the issue is that a page isn’t opening or displaying properly, then you can be on any page to start the recording before you try to open the problematic page again.

2. Click your user image or name in the global header and go to Troubleshooting > Record Issue. If you don’t see this menu item, then contact your help desk or security administrator.

3. For most issues, choose to collect page diagnostics while you’re recording. Collect performance statistics only if the issue is that the application is working too slowly.

4. Open the Advanced Options section (if you’re given access) and set the recording time according to your help desk or for as long as you think it would take to reproduce your issue. You can always stop the recording as soon as you’re done.

If you’re collecting page diagnostics, you can take screenshots while you record and attach them to your recording later. So take into account the time that it takes to capture screenshots.

5. If your help desk asks you to enter other advanced options, then fill out the rest of the section based on what your help desk tells you.

6. Click Start Recording to record on the current page, or on the next page that you open immediately after you click the button.

If you open yet another page after that, then the recording will automatically stop.

7. Click Stop Recording or record until the allotted time runs out.

8. If you’re collecting page diagnostics, optionally add notes and attach screenshots or other relevant files to the recording.

9. Note down your recording ID, and click Submit.

Tip: You can later open the Record Issue dialog box again and click View My Recordings to find the ID and other information about this recording.

FAQs for Troubleshooting
What's an incident?

An incident is a collection of diagnostic information for a critical application error. This information shows the state of the application at the time the problem occurred.

If you get an error message for an issue severe enough to prevent you from continuing your work, then an incident is automatically created and forwarded to your help desk. Any diagnostic tests associated with the error message would also run automatically, with the results added to the incident. Your help desk can also manually create incidents.

How can I find information about specific issue recordings?

After you record an issue, you get a confirmation with the recording ID and other information to identify your recording. To find this same information later:

1. Click your user image or name in the global header and go to Troubleshooting > Record Issue.
2. Click the View My Recordings button.

What's the difference between the recording ID and the recording number?

The recording ID is the unique identifier for your recording of an issue. Use the ID to find your recording later, for example from a list of recordings.

The recording is stored on a server, and the recording number identifies it on the server. To get the actual recording files from the server, your help desk needs the recording number and server information.

How can I view the version information of an application?

In the global header, click your user image or name and from the Settings and Actions menu, select About This Page. The basic details about the application are visible by default. However, you must have appropriate roles to view the version and release information, and other important details about the application.

What happens when the application is in maintenance mode?

When an application is in maintenance mode, you see a message on the UI displaying either the scheduled start time or the estimated completion time of the planned maintenance activity. During the maintenance period, the background processes and tasks, such as scheduled processes or any report generation activities, are put on hold.

Also, the Setup and Maintenance work area is available in a read-only mode.

After the maintenance is completed, all modules return to their usual state.
13 Accessibility

Overview of Application Accessibility

Oracle Fusion Applications are designed with accessibility features that support assistive technologies, such as screen readers. You can use the General Preferences: Accessibility page in the Set Preferences work area to set the accessibility modes of the application. For more information about Oracle's commitment to accessibility, see http://oracle.com/accessibility.

Keyboard Shortcuts

You can navigate the entire application without a mouse and access all relevant functionality using only the keyboard. You don't need assistive technology to use keyboard-only navigation, which is available to all users. Keyboard shortcuts enable you to perform user interface actions without using a mouse. For example, you can use keyboard shortcuts to save a file or open a tab. Keyboard shortcuts for specific UI elements come from the Oracle Application Development Framework components that they're based on. You might also find keyboard shortcuts that are specific to a particular feature or product.

Related Topics
- Oracle's Accessibility Program
- Set Up the Accessibility Modes

Accessibility Features

You can use assistive technology products, such as screen readers, while you work in the application. Certain components render differently in the screen reader mode. For example, date fields in the default mode have a date picker. You can either use the date picker to choose a date, or manually enter the date as text. In screen reader mode, you only enter information as text because date pickers aren't available.

You can also use a keyboard instead of a mouse. Some of the accessibility features discussed here are:

- Skip navigation links
- Additional role and state labels
- Isolated display
- Content change announcements
- Alternatives actions to drag and drop

Skip Navigation Links

When you access a page and press the Tab key, the Skip to main content link appears. Use this link to skip the global header and navigate directly to the filmstrip, which is the row of page entry icons before the page title.
Additional Role and State Labels
When you access a page in screen reader mode, the screen reader reads the labels of various user interface components such as menus and buttons, including the role and state labels. These additional labels identify the purpose and current state of the item. In some cases, the Web Accessibility Initiative - Accessible Rich Internet Applications (WAI-ARIA) standards are leveraged for role and state information.

Isolated Display
In screen reader mode, when you open a menu or a dialog box, the display is isolated on the open component until you close it. For example, when you open the Actions menu, only the Actions Menu heading and menu items are displayed. In addition to the menu item names, the isolated display provides contextual information for each item. For example, each item has Menu Item or Menu as a suffix, with the latter identifying submenus that you can open. For dialog boxes, the isolated display also provides additional information, for example to identify fields with invalid data entry.

Content Change Announcements
In screen reader mode, WAI-ARIA live regions announce changes to the application. For example, when you open or close dialog boxes, you can hear the rendering of partial content, progression of progress indicators, or changes in the menu and dialog box state.

Alternatives to Drag and Drop
Pages that provide drag and drop operations also support alternative methods of operation. In tables where you can use drag and drop to move columns, you can select Reorder Columns from the View menu, and move(or change) the order of the selected items.

Related Topics
- Set Up the Accessibility Modes

Keyboard Shortcuts

Keyboard Shortcuts for Oracle Application Development Framework Components
The application is based on Oracle Application Development Framework (ADF) components which come with standard keyboard shortcuts. In some cases, you might find different keyboard shortcuts specific to the page, feature or product that you're using.

Oracle ADF keyboard shortcuts are described in the Oracle Fusion Middleware Web User Interface Developer's Guide for Oracle Application Development Framework.

Default Mode
- Refer to the following sections in the guide for the corresponding keyboard shortcuts.

See: Keyboard Shortcuts
Shortcut Keys for Common Components
Shortcut Keys for Widgets
Shortcut Keys for Rich Text Editor Component
Shortcut Keys for Table, Tree, and Tree Table Components
Shortcut Keys for ADF Data Visualization Components
Shortcut Keys for Calendar Component

Screen Reader Mode
The keyboard shortcuts for some components in screen reader mode are different from the shortcuts in default mode.
- Refer to the following sections in the guide for the corresponding keyboard shortcuts.

See: Keyboard Shortcuts
- Shortcut Keys for Table, Tree, and Tree Table Components in Screen Reader Mode
- Shortcut Keys for ADF Data Visualization Components in Screen Reader Mode
- Shortcut Keys for Calendar Component in Screen Reader Mode

Keyboard Shortcuts for Infolets
You can use keyboard shortcuts to operate the infolets on the home page or specific work areas. The shortcuts might be different from the ones listed in the following table depending on the selected infolet.

This table lists the keyboard shortcuts for infolets.

<table>
<thead>
<tr>
<th>Action</th>
<th>Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Move focus backward among the components in the page</td>
<td>Shift + Tab</td>
</tr>
<tr>
<td>Open a context menu where available within a template in the page</td>
<td>Alt + Arrow Down</td>
</tr>
<tr>
<td>Open the different components in a chart</td>
<td>Ctrl + Arrow</td>
</tr>
<tr>
<td>Select and deselect the check box in My Infolets</td>
<td>Spacebar</td>
</tr>
<tr>
<td>Open links except those in charts</td>
<td>Enter</td>
</tr>
<tr>
<td>Open links in the templates with charts</td>
<td>Arrow</td>
</tr>
</tbody>
</table>
### Accessibility

<table>
<thead>
<tr>
<th>Action</th>
<th>Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Close dialog box</td>
<td>Esc</td>
</tr>
</tbody>
</table>

**Related Topics**

- Set Up the Accessibility Modes
Glossary

action
The kind of access, such as view or edit, named in a security policy.

analysis
A selection of data displayed in one or more views, such as a table or chart, to provide answers to business questions.

analytics
Business intelligence objects such as analyses and dashboards that provide meaningful data to help with decision making.

autosuggest
Suggestions that automatically appear for a search field, even before you finish typing your search term. You can select any of the suggestions to run your search.

business intelligence catalog
The repository where all business intelligence objects, including analyses, reports, briefing books, and agents, are stored. The catalog contains separate folders for personal, shared, and modified objects.

business object
A resource in an enterprise database, such as an invoice or purchase order.

dashboard
A page that gives quick access to key tasks and summary information for a business process or object.

dashboard
A collection of analyses and other content that gives in-depth insight to help with business decisions.

filmstrip
The single strip of icons that you can use to open other pages. The strip appears between the global header and the page title.
global header
The uppermost region in the user interface that remains the same no matter which page you're on.

global search
The search in the global header that lets you search across many business objects.

incident
A collection of diagnostic information about a critical error, providing details about the state of the application when the issue occurred.

infolet
A small, interactive widget on the home page that provides key information and actions for a specific area, for example social networking or your personal profile. Each infolet can have multiple views.

Navigator
The menu in the global header that you can use to open the work areas and dashboards that you have access to.

panel tab
A tab that provides supplemental information or functionality for the page. Each panel tab is on the right side of the page, has an icon as the tab label, and slides out when you open the tab.

personalization
A change that users make to control the look or behavior of the application. Personalizations impact only the user making the change.
**privilege**
A grant of access to functions and data; a single, real world *action* on a single *business object*.

**process set**
A scheduled process that contains multiple individual processes or other process sets.

**Query By Example**
The icon for filtering data in a table.

**report**
An output of select data in a predefined format that’s optimized for printing.

**role**
Controls access to application functions and data.

**scheduled process**
A program that you run to process data and, in some cases, generate output as a report.

**springboard**
The grid of icons on the home page that you can use to open pages.

**work area**
A set of pages containing the tasks, searches, and other content you need to accomplish a business goal.

**workflow**
An automated process that passes a task from one user (or group of users) to another to view or act on. The task is routed in a logical sequence to achieve an end result.