Oracle Fusion Cloud Applications

Using Common Features

25D

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Author: Barnali Roy, Essan Ni Jirman, P. S. G. V. Sekhar, Rebecca Nethala, Kalyani Manda

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Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

Get Help in the Applications

Some application pages have help icons to give you access to contextual help. 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. If the page has contextual help, help icons will appear.

Get Training

Increase your knowledge of Oracle Cloud by taking courses at *Oracle University*.

Join Our Community

Use *Cloud Customer Connect* to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest *ideas* for product enhancements, and watch events.

Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to *oracle_fusion_applications_help_ww_grp@oracle.com*.

Thanks for helping us improve our user assistance!

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.

Oracle Fusion Cloud Applications System Requirements

Before using Fusion Applications in browsers and on your mobile devices, check the operating systems, supported browsers, and other computer requirements.

Here are the minimum versions you need for your browsers.

Browser	Minimum Version
Apple Safari	18.0
Google Chrome	129
Microsoft Edge	129
Mozilla Firefox	131

Oracle supports all the platforms that the browser vendor supports, as indicated in this table. For mobile device operating systems, Oracle supports only the most recent browser.

Operating System	Apple Safari	Google Chrome	Microsoft Edge	Mozilla Firefox
Android	Not applicable	Supported (Chrome for Android only, not native Android browser)	Not applicable	Not supported
iOS/iPadOS	Supported	Not supported	Not supported	Not supported
Mac OS X	Supported	Supported	Not supported	Supported
Windows	Not supported	Supported	Supported	Supported

Other Requirements

To use the Oracle ADF Desktop Integration add-in for Excel, you need the appropriate Windows and Excel versions. See: *Supported Platforms for ADF Desktop Integration (Doc ID 2242428.1).*

Sign In and Get Started

Use the application link your company gave you to open the Sign In page. You can sign in using your application user name and password. Depending on setup, one of these Single Sign-On (SSO) options might also be available to you:

- Click the identity provider (IdP) name (which appears after the **Sign In** button) and sign in using your SSO credentials.
- Click the **Company Single Sign On** button and sign in using your SSO credentials.

  By using SSO, you can seamlessly access different applications without the need to authenticate yourself each time.

Watch video

How can I quickly go to the page I'm looking for to do my tasks?

Here's what you can try:

- **Global Search**: Enter the search keyword in the global search field to find what you want to work on and open the corresponding page from the search results.

  If you don't get what you're looking for in the search, try the Navigator.
- **Navigator**: Click the **Navigator** icon on the global header and select the required work area.

> **Tip:** If you're not sure which category to look under, click **Show More** to see all the work areas in all categories.

Keep reading to learn more about the search, the Navigator, and other options for getting to your page.

Home Page

Your home page shows a global header, which you can find on every page of your application. The global header contains some icons, the Navigator, and your user image or name. You can use them to get to the tasks you want to accomplish. You can click your user image or name to open the Settings and Actions menu.

You can use the work area icons in the Apps section of your home page to get to the work areas and do your tasks. If you don't find any work area icons in the Apps section, look for them in the Navigator. That's because the Navigator contains the full list of work areas that you've access to. Related work area icons are arranged in specific groups in the Navigator. These groups appear as tabs in the Apps section.

Here's how your home page looks.

Callout Number	UI Element	What You Use It For
1	Navigator	Open any of the work areas that you've access to.
2	Other global header functionality	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 **Home** icon or the logo in the global header.
3	Settings and Actions menu	To open this menu, click your user image or name in the global header. Do some general tasks, for example, change your preferences, show help icons if they're hidden, and sign out.
4	Tabs	See a set of work area icons and quick actions for a related set of tasks. These tabs correspond to groups in the Navigator.
5	Work area icons in the Apps section	Open your work areas from the group of icons on the home page. For example, click the **Getting Started** icon to open the Getting Started work area, where you can see materials that help you get going in the application. You can also show or hide specific work area icons using the **Personalize Springboard** icon. Here are a few things to know: • What icons you see in the Apps section depends on the tab you select. • If you're looking for any standalone work area, such as Setup and Maintenance, check in the Others tab. • If you can't see any tabs, it means you just have one visible group. In such cases, all

Callout Number	UI Element	What You Use It For
		work area icons in that group appear at the top level in the Apps section.
6	Quick Actions section	Go straight to some key tasks in the selected group. You can use **Show More** to see all quick actions in each group sorted alphabetically.

Note: You might see changes in icons, colors, and shapes of some UI components.

You might also find some important information displayed in specific sections of your home page. This table lists the sections and describes what you use them for.

Section	What You Use It For
Things to Finish	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.
News and Announcements	Read all relevant news, such as articles, events, and insights. **Note:** What information you see in this section depends on your user role.
Analytics	View infolets, usually shown in tabs. If you see an infolet's content at the top level (without any tabs), that means you've just one visible infolet. 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.

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

Ways to Find Key Tasks in the Global Header

Let's take a closer look at how to find key tasks using the icons in the global header.

Callout Number	UI Element	What You Use It For
1	Global Search	Find what you want to work on and open the corresponding page from the search results.
2	Home	Return to the home page.

Callout Number	UI Element	What You Use It For
3	Favorites and Recent Items	Bookmark pages or go back to those you recently opened. In some cases, when opening a favorite or recent item, you might encounter an issue where it doesn't open the exact page you expect. For instance, instead of directing you to a specific page, it might open the search page.
4	Watchlist	Open pages for key items that you're tracking.
5	Notifications	See informational messages and tasks that you must act on.
6	Settings and Actions menu	To open this menu, click your user image or name in the global header. Here are a few tasks you can do using this menu: • Set your preferences. For example, change your password or set your language and accessibility preferences. • Help troubleshoot problems if you run into any. The options you see in this menu depend on your role. For example, an administrator can see more options to configure the application.

Note: The **Search**, **Favorites and Recent Items**, and **Watchlist** features aren't available for all pages. In some work areas, such as Functional Setup Manager, the **Favorites and Recent Items** icon may not work as expected. See *Why am I not able to save a Functional Setup Manager task page to my favorites list?*

Related Topics

- Change Your Photo
- How You Use and Personalize Infolets in Oracle Fusion Cloud SCM and Procurement
- Keyboard Shortcuts for Home Page
- How can I configure how infolets are displayed in Fusion Applications?

Sign Out and Session Timeout

After you complete your tasks, you can sign out of your application. However, sometimes you might get automatically signed out due to session timeouts.

Let's understand how session timeouts work. When you sign in using your credentials, you're authenticated to use the application, and a session is established. During this session, you don't need to re-authenticate. But, for security purposes, your session is configured to be active for a predefined duration, which is called session timeout period. Your

sessions can expire due to various reasons such as, leaving your application idle for a period longer than the timeout period. In such cases, you're automatically signed out of the application. Your timeout periods may vary on certain pages. For example, you may observe a longer timeout period on pages that automatically refresh, or UIs that open up in separate windows or tabs.

This table lists the various types of session timeouts you may experience. After the specified duration, your session expires, and you need to sign in again to continue your work.

Note: Session timeouts are predefined and can't be edited.

Timeout Type	Description	Timeout Duration
Session Lifetime Timeout	Once you're authenticated in the application, if you're actively working on it, your session remains active for a predefined duration, referred to as the session lifetime timeout period. Your session ends after this period, even if you're using the application.	8 hours
Session Inactivity Timeout	This type of timeout considers the time elapsed since you last sent a request, for example responded to a poll or submitted a form, to the application server. After this duration, you get a message and an option to extend the session. If you don't extend the session, you're signed out of it.	10 minutes
Idle Session Timeout	This type of timeout considers the duration you leave your application idle for. After this duration, you get a message and an option to restart the session. • If you restart the session, your session timeout duration gets reset. • If you don't restart the session, you're signed out of the application.	120 minutes
Browser Inactivity Timeout	This type of timeout considers the duration you leave your browser idle for. After this duration, your session ends.	30 minutes

How Different Session Timeouts Work

If you're actively working on your application, your session remains active until the session lifetime timeout period, which is eight hours. However, session inactivity timeout considers the time elapsed since you last sent a request to the application server. For example, responded to a poll or submitted a form. These requests are sent to the server at

regular intervals and the session inactivity timeout will not happen. But here are a few scenarios when the poll or active data service requests will be stopped, and the browser inactivity timeout happens.

- If you leave your browser idle for more than 30 minutes.

  A warning appears informing you that the session has ended and you're signed out of the session. You need to sign in again and the home page is displayed.
- If you don't use the keyboard or mouse for more than 10 minutes. For example, if the server-side session timeout is 30 minutes, and the polling timeout parameter is set to 10 minutes, then the timeout events take place in the following sequence:
  - The session inactivity timeout starts during the polling time of 10 minutes.
  - In the next 30 minutes, the idle session timeout begins.
  - During the idle session timeout period, a session expiration warning message is displayed at the 28th minute. You'll be given 2 mins to reset the session timeout. If you reset the session, the current page will be displayed. At the end of the 30th minute, if you're still inactive, the session expires and you'll be signed out. You need to sign in again and the home page is displayed.

Best Practices for Minimizing Timeouts

Here are a few things to keep in mind:

- Sign in to only one active application instance.
- Don't sign in to the application in multiple browsers simultaneously.
- Don't sign in to the application in multiple tabs of the same browser simultaneously.

Sign Out

When you're done working in your application, you can sign out using the **Settings and Actions** menu. Click your user image or name in the global header to open this menu, and select **Sign Out** and then click **Confirm** to sign out of the application.

Overview of Work Areas

A work area is a set of pages that provides everything you need to accomplish a business goal.

Watch video

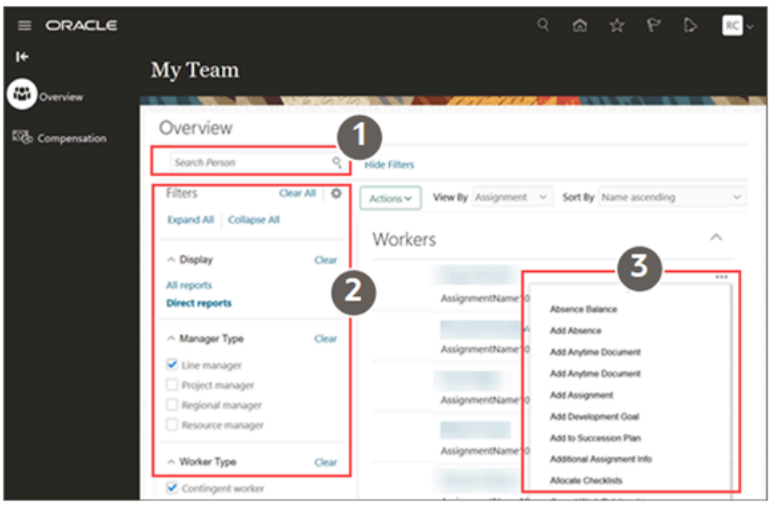
You can use work area icons on your home page or the Navigator to open work areas. When you open any work area, you see a landing page. Landing pages typically summarize data and let you drill down to more details. Often you can change the records that you view by running different searches or filters, or by clicking an infotile, if any on the landing page. Let's explore a couple of work areas.

Landing Pages with Searches and Filters

Some landing pages have filters you can use to view specific set of records that you're looking for. For example, you can remove some values to exclude records that you don't want to see, and then hide the filters. You can also use the search

to find what you need. You can select the **Actions** menu to get going with a few tasks on the specific records, or open the record to see or edit details on another page.

Here's a landing page of a work area, where you use searches (1) and filters (2) to view specific records, and the **Actions** menu (3) to do your tasks.

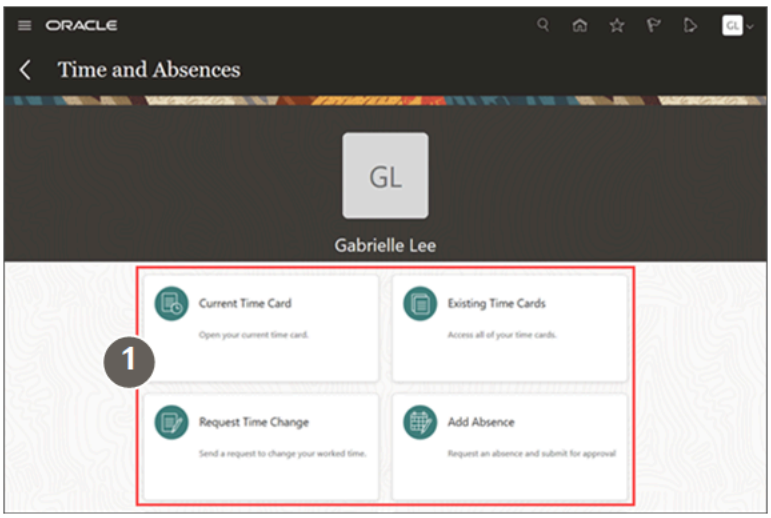


Sometimes, you might find this record in the form of a grid or list. You can use the **Grid** icon and the **List** icon to switch between these two views of the same records.

Landing Pages with Quick Access to Key Tasks

Now let's see another work area where you get quick access to a set of related tasks. On these landing pages, you easily see the key tasks you can do in the work area.

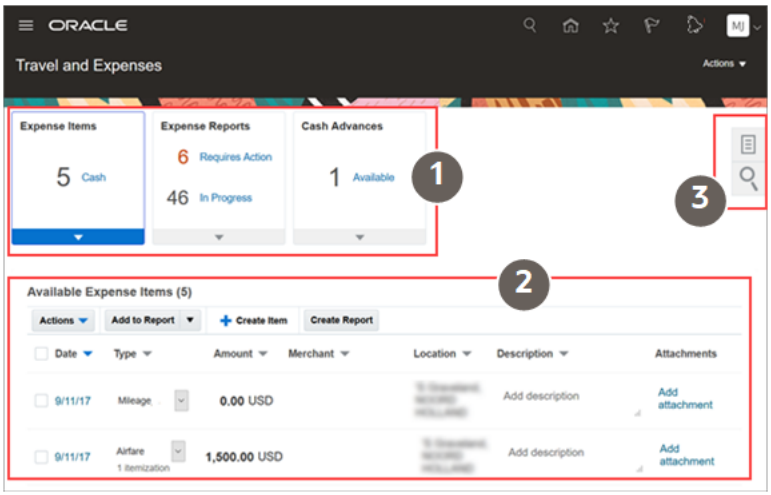
Here's a landing page of a work area, where you can quickly access the key tasks (1).



Landing Pages with Infotiles

Other than filters and searches, there are other ways for you to get to what you need to work on.

Some landing pages show the work areas with infotiles, which display key information about a set of records. You can click links in the infotile to filter the records. For example, you can see the list of items you need to act on.

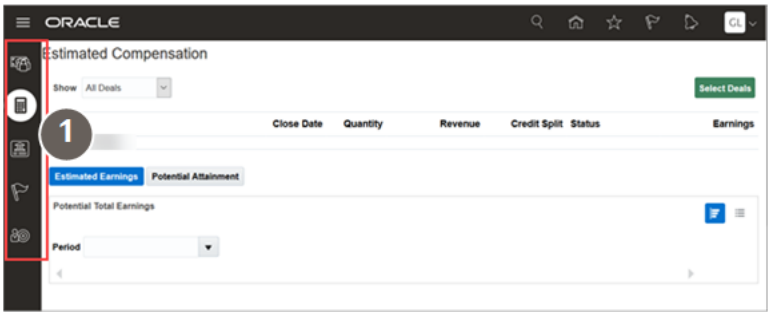


This table shows the available UI elements on the landing page and explains what you use them for.

Callout Number	UI Element	What You Use It For
1	Row of infotiles	Display key information about a set of records, such as expense items and expense reports.
2	Summary table	• View records for the infotile you select. • Drill down from the landing page to a specific record.
3	Panel tab	Do additional tasks, such as use the links to go to related tasks or view reports.

Some landing pages have tabs on the left you can use to go to another page in the same work area.

Here's a landing page of a work area with tabs on the left (1).



Landing Pages with Infolets

Some landing pages consist of only infolets. This is what a landing page with infolets looks like.

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.

There are many other types of work areas, which you can explore!

Related Topics

- Sign In and Get Started
- How You Use Tables
- How can I show or hide work area icons on my home page?
- Overview of Infolets

Change Your Password

Use the application link your company gave you to open the Sign In page and change your password for better security. You can use either of these methods to change your password.

- After you sign in, you can change your password using the **Set Preferences** option.
- On the Sign In page, you can change your password using the **Forgot Password** link.

Change Your Password Using Set Preferences

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**.

Change Your Password Using Forgot Password

1. On the Sign In page, click the **Forgot Password** link.
2. Enter the registered work email, select the Forgot Password option and click **Submit**.

   A notification containing a link to reset your password is sent to your work email.

Note:

- If you don't have your work email registered, the notification is sent to your line manager.
- If both you and your line manager don't have work emails registered, you'll not be able to reset your password. Contact your security administrator to register your work email.

This table shows which method you can use for resetting passwords based on your Single Sign-On (SSO) configuration.

SSO Configuration	Password Reset Method to Use	
	Set Preferences Option	Forgot Password Link
SSO Disabled	Yes	Yes
SSO Enabled	No	No
SSO with Chooser Enabled (both SSO sign-in and local authentication options are available)	No	Yes

Set Up Multifactor Authentication Methods

You use your password preferences to set up your preferred methods for authentication. After a method is set up, you can use it as a second factor of authentication for signing in.

Note: If your organization enables passwordless authentication, there's no option to sign in using a password. Instead, here's how it works:

- Use your phone number or email as your username.
- Rather than using a password, you will authenticate using multifactor authentication (MFA). So, before your organization implements passwordless authentication, you must have at least one MFA method set up.

Enroll in MFA and Set Up Your First Authentication Method

1. Click your user image or name in the global header, and select **Set Preferences** from the **Settings and Actions** menu.
2. Open your password preferences and click **Manage Secure Verification**.
3. Enable secure verification using any of the available methods. You go through this guided setup process only when you're enrolling in MFA for the first time.

Method	Action Required
Mobile App	Use either of these modes. o Set up the Oracle Mobile Authenticator App to send a push notification for allowing or denying a sign in attempt. o Set up the Oracle Mobile Authenticator App to generate a passcode.

Method	Action Required
Email	Verify your email address using the one-time passcode that's mailed to you.
Phone Number	Verify using the one-time passcode that's sent to your phone number as a text message.
FIDO Authenticator	Set up and save a passkey from the available options.

Note: Your work mobile number and work email are used for the Phone Number and Email methods. The number and email come from Oracle Fusion Cloud Applications, not Oracle Cloud Infrastructure.

Set Up Additional Methods and Manage Them

Right after you enroll in MFA, you can set up additional secure verification methods on the **Security** tab that opens in Oracle Cloud Console. Any time after enrollment, you can click the **Manage Secure Verification** link in your password preferences to return to the **Security** tab and set up additional secure verification methods or manage them.

Bypass codes are available as an additional authentication option. You can generate a bypass code and save it for later use, but you can use it only once. A bypass code comes in handy for you to sign in when your authenticator is unavailable for any reason like lost service or no service. You can also contact your administrator to get a bypass code.

Related Topics

- Using the Oracle Mobile Authenticator App
- Using FIDO Authentication
- Generating a Bypass Code

FAQs for Getting Started

What do I do if I can't find work area icons on the home page or the Navigator?

Here are a few things to know.

- If you can't find a work area icon on the home page, look for it on the Navigator. The Navigator is the main menu, where you can open all the work areas you have access to.
- You might not find some work area icons on the home page or the Navigator because your administrator has disabled those work areas.
- If you're looking for any standalone work area, such as Setup and Maintenance, check in the Others tab.
- If you need access to a specific work area, ask your security administrator to assign you a role that gives you access.

Related Topics

- Create and Edit Groups

How can I show or hide work area icons on my home page?

You can show or hide the work area icons that you use to navigate in the application.

Click the **Personalize Springboard** icon on the home page, and select or deselect the work areas icons to show or hide them.

Related Topics

- Sign In and Get Started

How can I reset my changes to the visibility settings of the work area icons on my home page?

In the Apps section of your home page, click the **Personalize Springboard** icon, and then on the Apps page, click **Reset**.

Related Topics

- How can I show or hide work area icons on my home page?

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

You may not see the **Favorites and Recent Items** and **Watchlist** icons because they aren't available for certain product families. However, if you can’t see any icon on the global header, that’s probably because of the colors that your administrator selected for the global text and icons while setting the appearance of your application.

Related Topics

- Appearance Settings for Classic Themes

Why am I not able to save a Functional Setup Manager task page to my favorites list?

Probably, you have opened the task using the Setup and Maintenance work area.

To mark a Functional Setup Manager task page as favorite, as a one-time process, open the task using the Offerings work area. After you mark a task as favorite, you can access it directly from the Favorites and Recent Items list.

1. Click **Navigator** > **My Enterprise** > **Offerings**.
2. On the Offerings page, select the offering you want to implement.
3. Click **Opt In Features**.
4. Click on the **Setup** icon for the required feature or functional area.
5. Search for and open the task.

6. On the task page, click the **Favorites and Recent Items** icon to add the page to your favorites list.

Related Topics

- Search for a Task

Why can't I see announcements on my home page?

That's because your administrator has either disabled announcements or not created any announcements.

Related Topics

- How do I create, edit, or delete announcements in Fusion Applications?
- How do I define the display settings of the home page with News feed layout?

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

That's because of either of these reasons.

- Probably you have enabled the pop-up blocker for your browser, and so you can't 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, which you can click to display the address on a map. To resolve this issue, disable the pop-up blocker in your browser settings and try again.

  This figure shows a work address with the contextual address icon.

- Your administrator hasn't yet set up the mapping service for contextual addresses.

Related Topics

- Set Up the Mapping Service for Contextual Addresses

2 Search

Overview of Search

You can use global search and page level search functionality to find specific information across the application.

- Global Search: use the search in the global header to quickly find something based on keywords across many business objects or categories. You can also use global search, if you don't have more specific criteria to search. When enabled, the global search is available no matter which page you're on.
- Page Level Search: use the searches on the pages where you do your work to find specific objects by entering multiple, detailed criteria. Some pages also have keyword searches that let you quickly search for the same business object.

  You can save any search you do on a page as a new saved search and can manage the saved searches available to you. Use filters to narrow down the list displayed in your work area, focus your search, and explore your data. You can use the **Show Filters** option to view the predefined filters for the saved search you selected.

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 isn't case sensitive, and it ignores characters that aren't 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 won't act as a wildcard, but as any other character in your search term.

This table shows some wildcard examples.

Search Term	Matches
add*	• The word **add** • Words beginning with **add**, such as **address**
country c*	Phrases such as **country code** or **country club**
exception *	The phrase **exception ***

Related Topics

- Why isn't the global search providing the results that I expect?
- How can I select the categories to search on in the global search?
- How can I select the groups to include in the autosuggest for the global search?
- How can I create a saved search for the global search?

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), follow these steps.

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), follow these steps.

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.

Related Topics

- Examples of Using Wildcards and Quotation Marks in Global Search
- How can I select the categories to search on in the global search?

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), follow these steps.

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?

To change the criteria in saved searches for the global search, follow these steps.

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?

To rename or delete saved searches for the global search, follow these steps.

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 on the page. Actual search results may vary, depending on factors such as how the search is set up or what data is available.

Note: In most cases, the search field isn't 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 won't 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.

Search Term	Matches
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**

Search Term	Matches
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.

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?

What gets saved when I create a saved search for searches with multiple criteria?

The saved search includes the following items.

- 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.

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.

Related Topics

- Save Keyword Searches with Filters

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**.

Related Topics

- Use Filters with Keyword Searches

3 Watchlist

Overview of Watchlist

Use the Watchlist to track important business objects and open the pages, where you work on specific items.

In the Watchlist, you can see how many items you've, and they're arranged in specific categories. 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 the expense reports. To open your Watchlist, you can click the **Watchlist** icon in the global header.

Note: The **Watchlist** icon isn't available for certain product families.

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 (**Navigator** > **Tools** > **Set Preferences**) to determine which categories and items to show or hide in your Watchlist.

Related Topics

- Create Watchlist Items
- Set Watchlist Preferences
- Why are some items not displayed in my Watchlist?
- Why is the count different between a Watchlist item and the page that the item link takes me to?
- Why can't I see 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

- Set Watchlist Preferences
- Why are some items not displayed in my Watchlist?
- Save Searches with Multiple Criteria

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 Approval Workflows

Overview of Notifications and Approval Workflows

Workflow involves passing a task from one user to another, usually for approvals. You get in-app and email notifications, for example, when a workflow task is assigned to you for approval. After all assignees approve, whatever got approved takes effect.

Some tasks are just for your information (FYI), and assignees don't need to do anything. Also, you might get notifications for things that are not part of a workflow.

Where You Get Notifications

Whether for workflow or not, here are the ways you can get notifications:

- E-mail notifications
- Notifications list in the global header
- Things to Finish section on your home page

Where You Find Workflow Tasks

You can open workflow tasks from notifications, or use your worklist or Approvals work area to find all the tasks relevant to you. So other than notifications, here's where you can find your tasks:

- Worklist: Notifications and Approvals work area (Navigator > Tools > Worklist)
- Approvals work area (Navigator > Tools > Approvals), if your administrator has set up the work area to replace the Worklist: Notifications and Approvals work area
- Worklist: Notifications and Approvals region on My Dashboard, if your administrator has added the region to the dashboard

Workflow Examples

Let's take a look at examples of how you might interact with workflow tasks:

- Say you submit a transaction for approval, which creates a workflow task that gets routed to your approvers. An approver sends the task back to you for more information about your transaction, so you provide the requested information and send the task back. 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, you would 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.

Related Topics

- Actions and Statuses for Workflow Tasks
- View and Act On Notifications
- Use Your Worklist to Manage Workflow Tasks
- Define Vacation and Other Rules for Workflow Tasks Assigned to Me
- How do I remove notifications from the global header and home page?

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.

Statuses

This table describes some possible statuses, or states, for workflow tasks.

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

Actions

This table describes some possible actions you can take on workflow tasks.

Action	Description
Ad Hoc Route	Add approvers to the task.

Action	Description
Approve	Approve the task, and the task completes or moves on to the next approver.
Claim	Assign the task to yourself so that you can act on it, if the task is currently assigned to a set of users. For example, a defined group of approvers or everyone who has a certain role.
Create Subtask	Create a child task to be completed as part of the original task.
Delegate	Pass the task to someone else to take action for you, but the task is still assigned to you. Choose the Users option and select a specific user, not the Groups option for selecting an LDAP group.
Dismiss	Close the task and acknowledge that you received it. You don't need to take action because the notification is only for your information.
Escalate	Reassign the task to your direct manager.
Push Back	Reassign the task to the previous approver.
Reassign	Reassign the task to someone you select. Choose the Users option and select a specific user, not the Groups option for selecting an LDAP group.
Reject	Reject the task and send it back to its creator in a final state.
Release	Make the task that you claimed available for someone else to claim.
Renew	Give yourself more time (seven days is the default) to act on the task, if the task is about to expire.
Request Information	Ask the task creator or any of the previous approvers for more information.
Resume	Revive a suspended task and continue working on it.
Skip Current Assignment	Reassign the task to the next approver (available only if you have a job role with either BPM Workflow All Domains Administrator Role or BPM Workflow System Admin Role assigned).
Submit Information	Send the information that was requested of you regarding the task.
Suspend	Put the task on hold until it's resumed. In the meantime, no one is assigned to act on it.
Withdraw	Remove the task from the workflow (available only if you created the task).

Related Topics

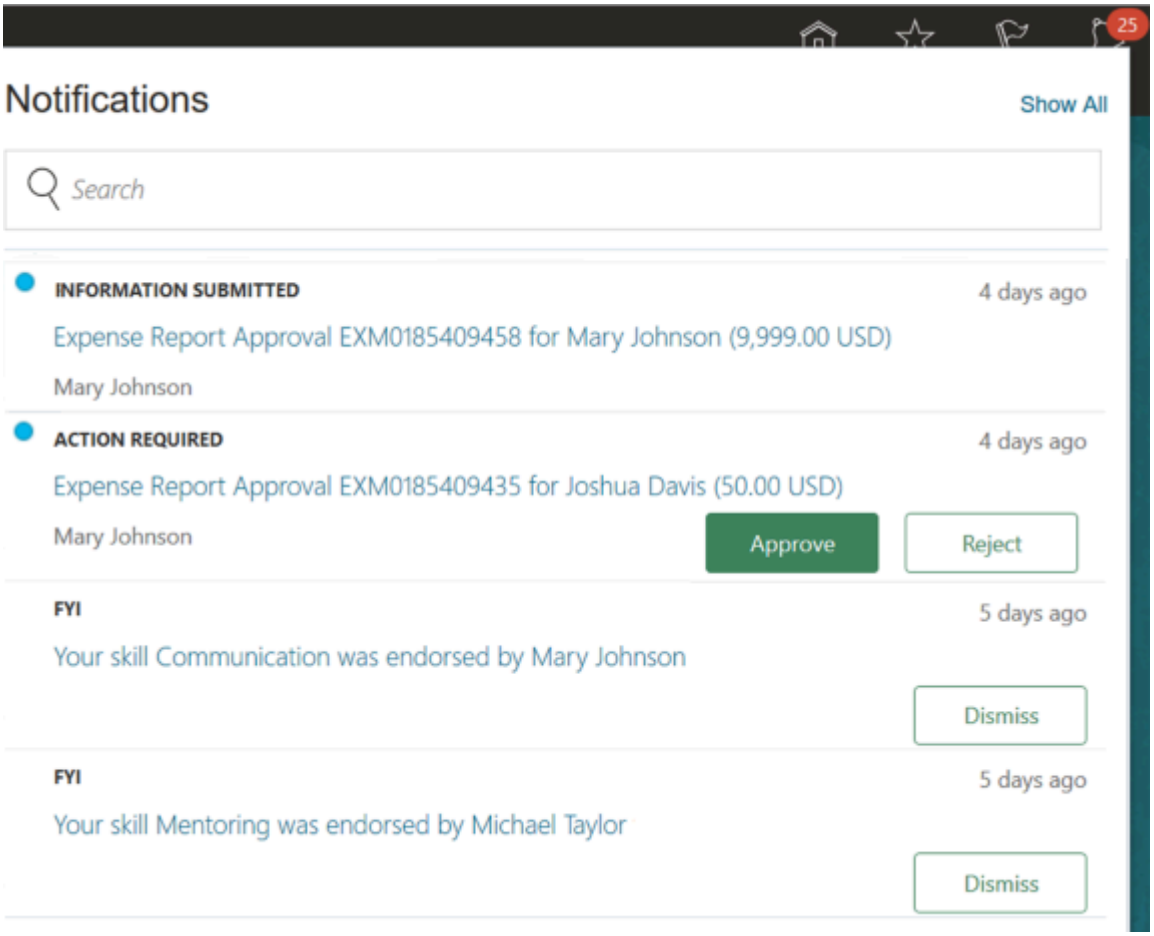
- Use Your Worklist to Manage Workflow Tasks

View and Act On Notifications

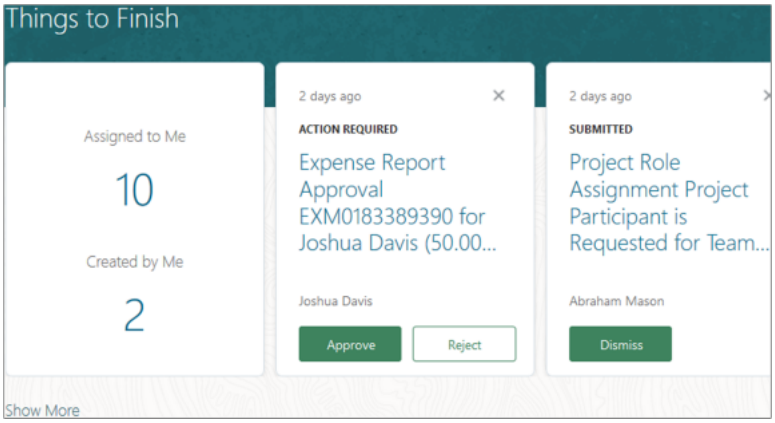
Notifications alert you that something requires your attention or action. Click the **Notifications** icon in the global header to open your notifications list. The number on the icon indicates how many pending notifications you haven't acted on or dismissed yet.

Most notifications are for workflow tasks, but not all. So it's possible that what you see in the list isn't the same as what you see assigned to you in the Worklist: Notifications and Approvals work area. Also, for one task you see in that work area, you might get more than one notification. For example, one notification that someone requests information from you about the task, and later another notification that the task is approved.

Here's an example of the notifications list in the global header. The Notifications icon says there are 25 pending notifications. The first two are new ones you have never seen before and require some action on your end. The third one you can approve or reject without even opening the notification. The next two are just FYI.



On your home page, you can also find notifications in the Things to Finish section, which looks like this.



The first card in the Things to Finish section has two numbers:

- **Assigned to Me:** The number of notifications assigned to you either to act on or just FYI, in this case 10. The rest of the cards in the Things to Finish section are the notifications assigned to you, the exact same as the pending 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 2.

Here are some things to know about both the Things to Finish section and the notifications list in the global header:

- From either place, you can open the Notifications page. That's where you can view and manage all your notifications in one place, not just the ones that are pending and assigned to you.
- Updates you make to workflow tasks in the global header, for example approving them, are automatically reflected in the Things to Finish section. Same goes the other way around, too. But changes you make elsewhere and changes that someone else makes aren't reflected in either place until the **Synchronize Notifications in Global Header** process runs, for example every two hours. The scheduled process updates workflow notifications with the latest task status and removes notifications older than 30 days no matter the status. For example, you approved one task from email, and someone else in the approval group that you're part of rejected another task from their notifications list. After synchronization, the notifications asking approval for these two tasks are removed from your list in the global header and your Things to Finish section. Because these tasks are no longer pending for you, based on the latest task status.
- Your notifications are in the default language you've set at the time of notification creation, not the language you selected when you signed in. If you change your default language, notifications created before the change, for example the title or Approve and Reject buttons, remain in the language that was set when they were created. Notifications for new tasks are in the new default language after a minimum of 30 minutes.

How You Address Your Notifications

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.
    - Here are a couple of things to know about the list that opens up in the global header:
        - The **New** 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.
        - You can search based on the text of the notification titles in the list. For example, if you search by the term **reports**, search results include all notifications with **reports** in the title, but not the ones without **report**.
    - 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. Go on to the next step, or click one of these links to open the Notifications page:
    - **Show All** from the notifications list in the global header
    - A number 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** in the Things to Finish section
3. For a notification that requires action, you have a few options:
    - Click the **Approve** or **Reject** button, where available.
    - Open the **Actions** menu and select an action, where available.
    - Click the notification title to see the details and select from all available actions. Depending on what the notification is about, some actions might not apply. 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.
4. For a notification that doesn't require action, you also have a few options:
    - Click the **Dismiss** button to acknowledge the notification and dismiss it. This option is available only for FYI tasks. The FYI task itself isn't marked as acknowledged, so it's still pending to be either manually or automatically completed.
    - On the Assigned to Me tab on the Notifications page, click the **Dismiss All** button.
        - For workflow tasks, this option is available only for tasks where action is already taken and there's no more action pending with assignees. For example, the task is approved or withdrawn. This option doesn't apply to FYI workflow tasks.
        - If you still see some notifications after you click **Dismiss All**, those are notifications for FYI workflow tasks, notifications that still require action, or notifications that you have to first open up to see details before dismissing.
    - Click the notification title to open the details.
    - Just read the notification title, if the title is text-only and not a link because there aren't any details to display.
5. 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 which option you choose to address notifications that require action or not, 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.

Related Topics

- Use Your Worklist to Manage Workflow Tasks
- Actions and Statuses for Workflow Tasks
- How do I remove notifications from the global header and home page?
- Why are workflow notifications that I acted on still in the global header and home page?
- Set Language Preferences
- How do I sync in-app notifications for all users in Fusion Applications?

Use Your Worklist to Manage Workflow Tasks

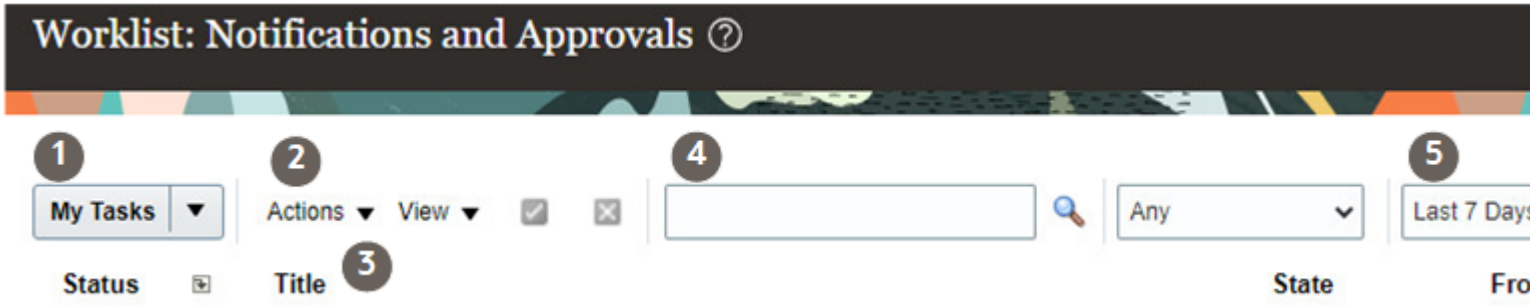
Notifications are helpful for recent activities with workflow tasks, but to manage all your tasks, use your worklist instead. With your worklist, you can, for example, keep track of tasks that you created, or browse for tasks by status.

To get to your worklist, open the Worklist: Notifications and Approvals work area. You can also find your worklist on My Dashboard, if your administrator has added the Worklist: Notifications and Approvals region to that dashboard. There, you get a quick view of all the tasks that are currently assigned to you based on applied filters.

> **Note:** If the Approvals work area is enabled by your administrator, it replaces the Worklist: Notifications and Approvals work area.

Use the Worklist: Notifications and Approvals Work Area

Let's look at some parts of this work area.



Callout Number	UI Element	What You Use It For
1	Current Selected View menu	To see a certain set of tasks, for example the tasks you created.
2	Actions menu	To perform an action on the tasks you select in the table.

Callout Number	UI Element	What You Use It For
3	Title column	To open the task details by clicking the task title.
4	Status list	To filter the tasks you see in the table based on the task status you select.
5	Show Tasks by Created Date list	To filter the tasks you see in the table based on created date. This filter applies only to the default My Tasks view.

Here's how you use this work area to manage workflow tasks:

1. Click **Navigator** > **Tools** > **Worklist**.
2. To see only the tasks that you created, click the **Current Selected View** menu and select **Initiated Tasks**. Or, just leave the default My Tasks view to see tasks assigned to you now or in the past, or select any other available view.

   > **Tip:** The default created date filter is Last 7 Days, so it's possible you may not see all of the tasks you need to view or work on. If the table is empty, shows less activity than you'd expect, or doesn't include older tasks that you want to work on, try selecting a longer period from the **Show Tasks by Created Date** list. Similarly, you might not have any tasks with the Assigned status, which is the default status filter. To view additional tasks, select **Any** from the **Status** list. Remember, the Show Tasks by Created Date list is available only in the My Tasks view.

3. To act on a task without viewing the task details, select the row and use the **Actions** menu on the table toolbar. Or, click the task title to see the task details.
4. In the task details, you might also be able to do some things that don't affect the routing or status of the task. Those actions include adding comments, adding attachments, and viewing the approval history. If you don't see sections for those actions, use the equivalent options from the **Actions** menu in the task details.
   - Add Comments: Enter comments that anyone with access to the task can see.
   - Add Attachment: Attach files that anyone with access to the task can see.
   - View Approvals: See the approval history for the task. For example, for a task that you created, you can see who already acted on your request, whose approval you still need, and what the status is with each assignee.

     If you see both a table and a flowchart, you're looking at two views of the same history, with past assignees listed in sequential order. To add more assignees to the task:

     i. In the History table, select a future assignee who hasn't yet acted on the task.
     ii. On the table toolbar, click the **Add** icon to insert an assignee before or after the one you selected.

     If you're the last assignee, you can't add assignees using this **Add** icon. So you might try instead the Ad Hoc Route or Reassign options from the **Actions** menu in the task details, if available.
5. In the task details, use the buttons or **Actions** menu for tasks that you need to act on. Here are some possible options in the **Actions** menu:
   - **Request Information:** Select the person you want information from, and enter what you're asking for in the **Comments** field. Indicate what should happen after the person you selected has provided the

information you asked for. Either the task should come directly back to you, or it should continue through the usual workflow process.

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

Use the Worklist: Notifications and Approvals Region

You get this region only if your administrator has added it to My Dashboard.

1. Click **Navigator** > **Others** > **My Dashboard**.
2. Use the Worklist: Notifications and Approvals region the same way you would use the Worklist: Notifications and Approvals work area, except here you can see only tasks with the Assigned status.

Related Topics

- Actions and Statuses for Workflow Tasks
- View and Act On Notifications
- Define Vacation and Other Rules for Workflow Tasks Assigned to Me
- Use the Approvals Work Area to Manage Approvals
- Overview of Notifications and Approval Workflows

Use the Approvals Work Area to Manage Approvals

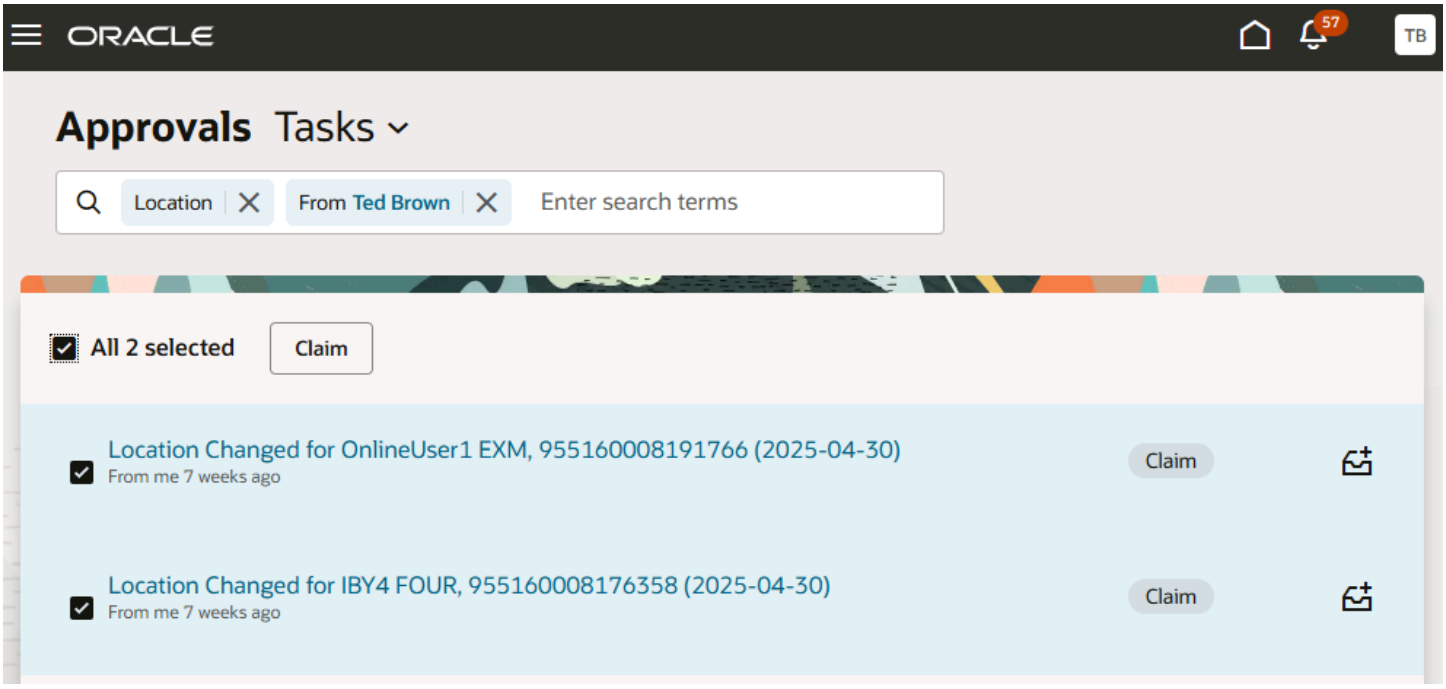
If it's set up, use the Approvals work area instead of the Worklist: Approvals and Notifications work area. The Approvals work area provides an enhanced user interface and adaptive search functionality, consisting of three views allowing you to easily find approval tasks you need to work or act on.

If the application is set up, you can click Navigator > Tools > Approvals to open it, instead of Navigator > Tools > Worklist to open the Worklist: Approvals and Notifications work area. If it's not set up, continue using the Worklist: Approvals and Notifications work area.

The Approvals work area has three views.

Approvals Tasks

The Approvals Tasks page shows a list of all assigned approval tasks for which an action is needed. The list includes approval requests, requests for information, or FYIs, which can be dismissed once acknowledged. You can organize your work using supplied filters, search on keywords, and approve or reject approvals.



Supplied filters include:

- Task type, for example Approvals, FYI, or Request

  > **Note:** In the list, FYI tasks aren't included in the default filtering. If you want to see FYI tasks, select them in the filter.

- Approval type, for example, expense reports
- From, or the person who sent the approval

You can also search by keywords on other attributes of the tasks. Any combination of search and filters can be bookmarked and shared.

Supported actions include:

- Claim
- Approve
- Reject
- Withdraw
- Reassign
- Dismiss (FYIs)

You can select one or more tasks and perform batch actions on them, including any action that's available for all selected tasks. In the following cases, a drawer opens if needed to support a requirement for an action. The following actions have drawers when performing batch actions:

- Approve and Reject and custom actions: Enter a comment if required by one or more of the selected tasks.
- Reassign: Enter the user to reassign to and a comment.
- Withdraw: Optionally, enter a comment.

You can also comment on approval or rejection actions in a drawer.

Details View

Click a task in the list to open the Details view, which displays additional information about the approval and you to approve or reject it. You can click the **Next** button to navigate to the next task in the list.

To get more information or take an action that’s not in the Details view, click **View More Details**.

Click the **Approvals Tasks** link to navigate back to the list.

Approvals Status and History

Click **Approvals Status and History** in the Approvals Tasks page to view the current status and assignee for approvals that you submit or have an interest in.

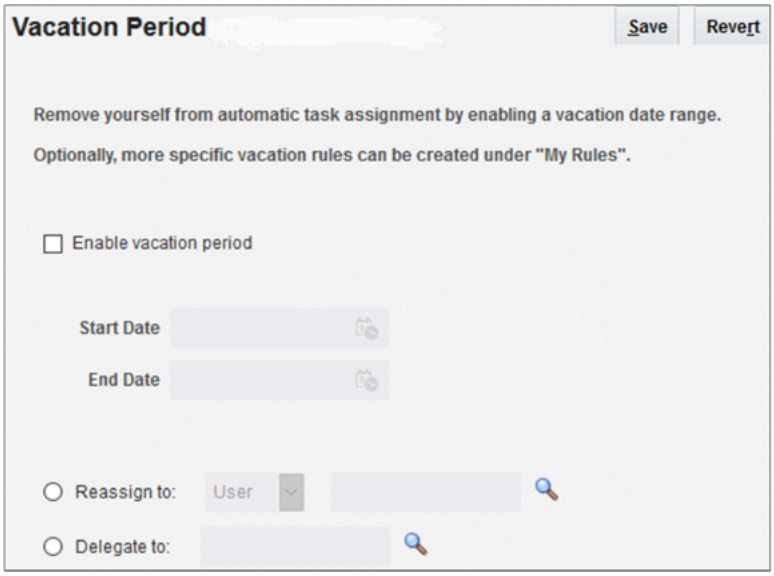
- Approvals you submitted
- Task statuses for approvals you’ve previously approved
- Approvals that have been rejected
- Approvals with requests for information

Use the supplied filters and search by keyword to find historic approval information.

Define Vacation and Other Rules for Workflow Tasks Assigned to Me

Define a vacation rule so that when you're out, tasks that are assigned to you get reassigned or delegated to someone else. You can also have rules for other reasons, for example, to always delegate a certain type of approval.

Enable and Define the Vacation Rule

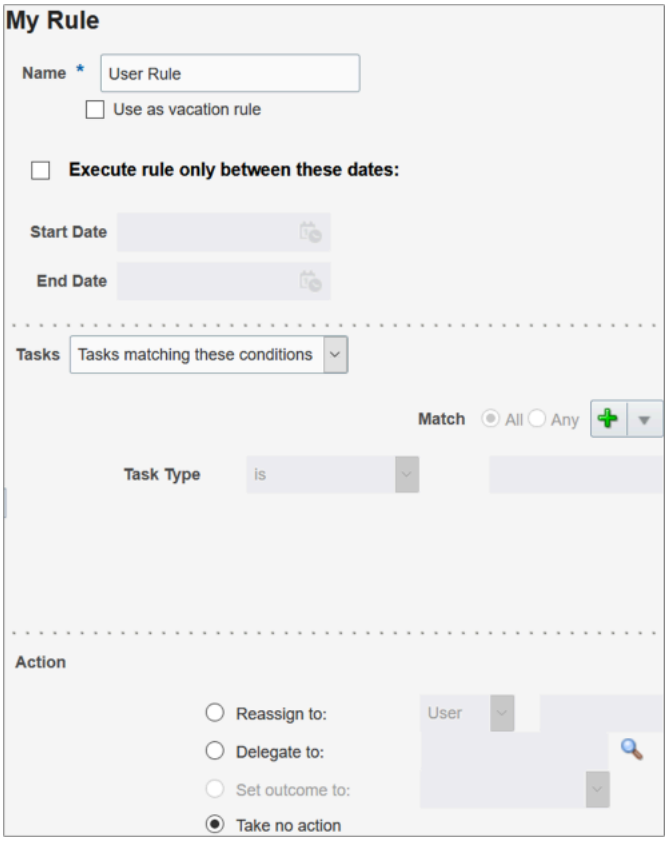


1. In the global header, click the **Notifications** icon.
2. Click **Show All**.
3. On the Notifications page, click the **Worklist** button.
4. In the new browser window, click your user name and select **Preferences**.
5. On the My Rules tab, select the Vacation Period rule if it isn't already displayed.
6. On the Vacation Period page, select the **Enable vacation period** check box, and enter the start and end date for your time out of office.
7. Select to reassign or delegate your tasks, and provide an assignee. Delegate means someone else is addressing the task on your behalf, so the task is still assigned to you. Reassign means the task is passed on completely to someone else.
8. Save your work.

If you need additional vacation rules, you can use the following steps to define other rules on the My Rules page. Select the **Use as a vacation rule** check box on the My Rule page. Those additional vacation rules apply to the same date range that you defined on the Vacation Period page.

For example, on the Vacation Period page you choose to delegate tasks to your administrative assistant. You also define a rule on the My Rule page so that tasks related to hiring are reassigned to your manager. The rules under My Rules take precedence. So, during your vacation, all of your approval tasks are delegated to your assistant except for the hiring ones, which are reassigned to your manager.

Define Other Rules



1. In the global header, click the **Notifications** icon.
2. Click **Show All**.
3. On the Notifications page, click the **Worklist** button.
4. In the new browser window, click your user name and select **Preferences**.
5. On the My Rules tab, select **My Rules** in the Rules pane.
6. Click the **Add New Rule** icon in the Rules toolbar.
7. On the My Rule page, enter a unique name for your rule.
8. Set dates for when the rule is effective, if needed.
9. For the rule to apply without tasks having to meet any conditions, select **All Tasks** from the **Tasks** list.

   Otherwise, define or delete the condition for task type. Click the **Add condition** icon to define more conditions. You can have more than one condition.
10. In the Action section, define what happens with this rule.
    - Reassign to: Pass the task on to someone else.
    - Delegate to: Have someone else address the task on your behalf. The task is still assigned to you.
    - Take no action: Use this option only when you're creating exception rules. For example, let's say you have a rule that reassigns all of your expense report approvals. But, you want to approve expenses from a specific employee yourself because you had issues with their expenses in the past. You can create an exception rule with that employee as the condition, and select **Take no action**. The expense reports from that employee would remain assigned to you.
11. Save your work.

Tip: If you have more than one rule under My Rules in the Rules pane, you can prioritize them. Select a rule in the Rules pane and click the **Decrease Rule Priority** or **Increase Rule Priority** icon in the Rules toolbar. Rules with a higher priority take precedence over those with lower priority.

Related Topics

- Actions and Statuses for Workflow Tasks
- Overview of Notifications and Approval Workflows

FAQs for Notifications and Approvals

Why are workflow notifications that I acted on still in the global header and home page?

If you acted on the workflow task elsewhere, the notifications remain until after the next scheduled run of the **Synchronize Notifications in Global Header** process.

For example, you approved a task through email or the Worklist: Notifications and Approvals work area. The notifications list in the global header and the Things to Finish section on the home page won't immediately reflect that change to the workflow task. The same goes for the Notifications page that you can open from the notifications list in the global header or from the Things to Finish section.

Related Topics

- How do I sync in-app notifications for all users in Fusion Applications?

Why can't I see a workflow notification in the global header and home page when I can see it elsewhere?

There are many possible reasons, depending on what your specific scenario is.

- Let's say you get an email notification but don't see it in the notifications list in the global header and the Things to Finish section on the home page. Most likely your administrator has enabled only email notifications, not in-app notifications. In which case, you can still find the corresponding workflow task in the Worklist: Notifications and Approvals work area.
- Or, say you don't get a notification in email, the global header, and home page, but can see the task in the Worklist: Notifications and Approvals work area. It's possible your administrator disabled all workflow notifications. Or, if the user ID you use to sign in with has a space in it, that would cause issues with sending notifications. Ask your security administrator to update your user account and remove any spaces in your user ID.
- It's also possible that you did see the notification in the global header, the home page, or Notifications page, but you can't find it there anymore even though you didn't address it yet. And, you might still see the task in the Worklist: Notifications and Approvals work area. Most likely that means your notification is older than 30 days

and was removed. Or, maybe the notification is for a task that's assigned to an approval group that you're part of, and someone else acted on the task so it's no longer pending for you.

How do I remove notifications from the global header and home page?

Submit the **Synchronize Notifications in Global Header** process to run on a schedule, for example every two hours. The process removes notifications older than 30 days from these places:

- The notifications list in the global header
- The Things to Finish section on the home page
- The Notifications page that you can open from either of the first two places

At any time, you can also manually remove notifications older than 30 days. Just click **Notifications** in the global header and run a search.

If a notification is for a workflow task, it's removed no matter what the task status is. You may still be able to find the task in the Worklist: Approvals and Notifications work area.

Related Topics

- How do I sync in-app notifications for all users in Fusion Applications?

Where do the currencies on notifications come from?

On some email and in-app notifications, you might see amounts in both the original transaction currency and your preferred currency. The preferred currency comes from your general preferences.

Note: Your administrator can set general preferences for you, but you can also override that and set it for yourself.

Related Topics

- Set Your General Preferences
- Set General Preferences for All Users

Can email notifications be sent again to someone who was already notified?

Yes, your administrator can select **Resend Email Notification** from the **Actions** menu in the Transaction Console work area to resend emails to the current workflow task assignee. If you have access to the work area, you can do so yourself.

For example, if a task has been pending for a while, maybe the assignee didn't see the original email notification, or had accidentally deleted it. Or, the original email body wasn't formed correctly. For any of these cases, and more, resending the email can help move the approval along.

Related Topics

- Manage Workflow Transactions

Monitor and Troubleshoot Transactions

Manage Workflow Transactions

After workflow tasks are created, it's helpful to keep track of them and jump in when needed, especially when something goes wrong. If you have the appropriate access, 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. Here are some of the things you can do:

- Track transaction statuses and download spreadsheets with information about transactions.
- Download and review diagnostic logs for transactions. For example, you can see the conditions in the approval rules that might have caused an error.
- Depending on what's going on with the transaction and what access 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, make sure you're on the Transaction Summary tab.
3. On the Transaction Manager: Transactions page, check the **Last Refresh** time stamp after the page title to see when the transaction statuses were last updated. Click the **Refresh** icon if needed. You can refresh any time as long as someone else didn't already start a refresh.
    - You can also click the **Refresh** icon for a specific row in the table to refresh individual transactions.
    - Also, the **Refresh Transaction Administrator Console Transaction Status** scheduled process automatically runs to refresh the statuses.
    - If you open the details for a specific transaction (step 5), its status also refreshes and you see the latest on the details page.
4. View the transactions with a status that matches the default Status filter, for example Failed. You can remove this filter to get results for all statuses. Or, use the search and filters to apply your own criteria, for example, to find transactions that are priority 1 or submitted by a specific person, or to use more performant fields.
    - 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.
    - You can personalize filters to add or hide filters, and create saved searches for future use. For example, it's recommended to use the more performant **Assignee Name** field instead of Assigned To, and to select the **Assignee Role** field to search for transactions assigned to a specified role. If the **Submitted By** field is part of your saved search, you may be prompted to re-create the search to take advantage of a more performant Submitted By field.

5. Select and 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 access 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 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.

   > **Note:** You can change the Assigned To field in your saved search to the more performant **Assignee Name** field, and add the **Assignee Role** field to search for transactions assigned to a specified role.

6. Add comments, for example to track what you're doing to address the issue, or note down any service request IDs. You and others can see these comments only in the Transaction Console, not with 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:
   - Open the **Actions** menu and select an action to manage the transaction.
   - 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**.

Download 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

- Statuses for Filtering Transactions
- Automatically Refresh Transaction Statuses
- Actions for Managing Transactions
- Use Filters with Keyword Searches
- Save Keyword Searches with Filters

Statuses 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.

Note: These statuses aren't the actual workflow task statuses that you see in the worklist or in notifications.

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

Related Topics

- Manage Workflow Transactions
- Actions and Statuses for Workflow Tasks

Automatically Refresh Transaction Statuses

The **Refresh Transaction Administrator Console Transaction Status** scheduled process automatically runs every hour. It refreshes the statuses on the Transaction Manager: Transactions page in the Transaction Console work area.

Hourly is the recommended frequency, and it should be enough, especially since you can just refresh using the **Refresh** icons on the page. But if you really need to, say due to an extraordinary volume of transactions, you can submit the process to run on a more frequent schedule.

- Be careful if you do this, because you are adding load to the queue of all scheduled processes. Consider if that potential performance impact is really warranted.
- If your manually submitted process has any scheduled runs that overlap with the automatic hourly ones, your process would run instead of the automatic one.
- The automatic process still runs whenever there's no overlap with your process.
- The time it takes for the process to finish depends on the volume of transactions, but it usually ends in minutes. So if it's taking hours or longer, something is most likely wrong.

To run this scheduled process, you need a custom job role that has the Perform HCM Approval Transaction Actions (PER_PERFORM_APPROVAL_TRANSACTION_ACTIONS_PRIV) privilege. If you can access transactions on the Transaction Manager: Transactions page, you already have this privilege.

Related Topics

- Submit Scheduled Processes and Process Sets

Actions for Managing Transactions

Use the Transaction Manager: Transactions page in the Transaction Console work area to manage and troubleshoot transactions. There are many actions you can take. 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 custom 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.

Action	Description
Add Comment	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. You and others can see these comments only in the Transaction Console.
Alert Initiator on Error	Notify the submitter if the transaction ends up in error.
Approve	Approve the transaction if the workflow task is currently assigned to you to approve or reject.
Download	Get a spreadsheet with information about the selected transactions.

Action	Description
Reassign	Reassign the workflow task to an approver, the submitter, or someone else. This action isn't available if the workflow task is based on a Position list builder.
Recover	Restart the process after the transaction stopped due to errors. After you address the issue, use this action to pick up where the process had stopped and try what had ended up in error again.
Reject	Reject the transaction if the workflow task is currently assigned to you to approve or reject.
Resend Email Notification	Send an email notification to the current assignee of the workflow task, for example, if they can't find the original email. This action is available only if the transaction is in progress and involves a workflow task that's currently assigned. • In some cases, the in-app notification is sent as well. • If someone from a group of approvers has claimed the task but hasn't acted on it, the notification is still sent to the entire group.
Terminate Process	Completely end the transaction so that no one can see or act on the workflow task again.
Withdraw	Remove the workflow task from the workflow. You can ask the submitter to submit again, for example, after an issue is resolved.

Related Topics

- Manage Workflow Transactions
- Statuses for Filtering Transactions
- Actions and Statuses for Workflow Tasks

Archive and Purge Transactions

To optimize the performance of the Transaction Manager: Transactions page in the Transaction Console work area, archive and purge completed transactions. Run the **Archive Transaction Console Completed Transactions** scheduled process to remove transactions from the page.

A transaction must meet these criteria to be eligible for archive and purge:

- The transaction has the Completed status for at least a certain amount of time. The default is three months.

  If you have access to the Approval Rules tab in the Transaction Console work area, you can change the duration for all transactions of specific business processes. Here are the options you can select:

  - 3 months
  - 6 months
  - 9 months
  - Don't archive
- All workflow tasks in the transaction are already archived and purged.

If you have access to the Approval Rules tab, you can also click the **Archive** icon to run the scheduled process immediately.

Before You Start

You need a custom job role that has the Run Approval Transactions Archive Process (PER_RUN_APPROVAL_TRANSACTIONS_ARCHIVE_PROCESS_PRIV) privilege.

Review this before you submit the process:

- You're strongly advised to schedule the process to run once a day, during off hours.
- Make sure that the process doesn't try to start while another run of the same process is still going. This process is self-incompatible and only one instance of the process can run at any given time.
- The time it takes for the process to finish depends on the volume of transactions, but it usually ends in minutes. If you're running the process for the first time, or it hasn't run in a very long time, the process might take much longer to finish. So it's best to run it daily, as recommended.

Parameters

If you have access to the Approval Rules tab, most likely you don't need to worry about these parameters. You can just define and use the settings on that tab. But if you don't have access, you can use these parameters to override those settings. Another reason you might use these parameters is if you have a need to archive immediately at any given time, for one or more business processes.

- **Days:** Enter the number of days that a transaction must already have the Completed status to be eligible for archive and purge.
  - Enter **0** if you want all transactions with the Completed status to be eligible immediately.
  - This parameter isn't available by default, but requires setup.
  - This parameter applies to transactions in all business processes.
  - If you leave this parameter blank, or the parameter isn't available, the setting for each business process on the Approval Rules tab takes effect. For example, the **3 months** default, or **Don't archive**.
- **Process Name:** Select all or specific business processes.
  - The scheduled process includes transactions for the selected business process names.
  - If you leave this parameter blank, the scheduled process considers all business processes except the business processes set to **Don't archive** on the Approval Rules tab, if any.

Let's say you enter **30** for the Days parameter and leave the Process Name parameter blank. Business processes set to **Don't archive** on the Approval Rules tab are excluded. The 30 days would still apply to all other business processes on the tab.

Purge Archived Transactions

You can set up purge policies to archive transactions in the Transaction Console based on your organization's data retention policies.

Related Topics

- Submit Scheduled Processes and Process Sets
- How Workflow Tasks Are Archived and Purged

Review Employee Vacation and Delegation Rules

Use the Employee Vacation and Delegation Rules Report to get details about the rules that users defined to reassign or delegate the workflow tasks assigned to them. This report is available as a scheduled process.

For example, your employee is on vacation, and you need to know what happens to tasks assigned to them during that time. The report tells you if they have set up a rule to reassign or delegate to someone else to approve. You can also see who the designated person is.

Before You Start

Review this before you run the report:

- You can run the report as a scheduled process from the Scheduled Processes work area if you have a custom role that contains the following:
  - Run BPM Workflow Reports (FUN_RUN_BPM_WORKFLOW_REPORTS_PRIV)
  - Run BPM Workflow Reports (FUN_RUN_BPM_WORKFLOW_REPORTS_PRIV_OBI)
- Run the report on an as needed basis, whenever you need information about users' vacation or other delegation rules. Don't submit this report to run on a recurring schedule.

Report Parameters

The report includes rules that are active, inactive, or both on the day that you run the report. Let's say you run the report on November 10, and select **October 1** for the From Date parameter and **October 30** for the To Date parameter.

And for example, there are three rules with these active dates:

1. September 25 to October 10
2. October 5 to October 15
3. October 30 to November 30

The report can potentially include any of these rules, which have active dates within the period you set in the From Date and To Date parameters. What you select for the Rule Status parameter determines which of the three rules are actually included in the report:

- Active: Only the third rule is included because only that rule is still active on November 10.
- Inactive: Only the first two rules are included because those are inactive on November 10.
- All: All three rules are included.

> **Note:** If you leave the From Date and To Date parameters blank, the report runs as if you had entered the first and last date of the current month.

Report Output

You don't need to define the output when you submit the report. You will get a spreadsheet with these sections:

- Originator Employee Details: Information about the user who defined the rule.
- Rule Details: Information about the rule, including when the rule is effective and any conditions that a workflow task must meet for the rule to apply. There are two types of rules:

    - Vacation: A rule for when the user is out of office.
    - Delegation: Any other rule that the user defined for tasks assigned to them, for example to delegate or reassign tasks based on certain conditions.
- Destination Employee Details: Information about the person whom tasks are delegated or reassigned to.

If you don't get a spreadsheet, or the spreadsheet is blank, one thing you can do is to contact your security administrator. Confirm if you do in fact have the privileges listed earlier.

Related Topics

- Submit Scheduled Processes and Process Sets
- View Output from Scheduled Processes

How You Can Regularly Reassign Pending Approvals for Workers That Become Inactive

A manager assignment can become inactive due to the end of an assignment or work term, termination, or global transfer. If the manager has any pending approval notifications, you must reassign them.

Run this process: Run Reassign Pending Approvals for Terminations and Correct Invalid Supervisor Assignments Process in the Scheduled Processes work area. You can set a schedule to run it at least once a day. You can run it more frequently if you want things updated faster.

Here's what the process does:

- It reassigns the direct reports of a terminated manager to that person's line manager and also assigns any pending notifications to the line manager. Only actionable notifications will be reassigned.
- It reassigns pending approval notifications based on the number of days you specify using the Past Period in Days Considered for Reassigning Pending Approvals parameter.

Related Topics

- Submit Scheduled Processes and Process Sets

5 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 which are described here.

Some of the options 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, you can then select **About This Record** from the **View** menu, to see who created and last updated the record, and when. The **Creation Date** field shows the date and time when you first start creating a record. The **Last Update Date** field shows the date and time when the record is saved. So, suppose you start creating a record, enter data, and then click **Save** after 35 seconds. The time displayed for **Creation Date** and **Last Update Date** will have a difference of 35 seconds. If you make any subsequent updates to the record, your last update date will change.

View Data

Here are the various options you can use to view the data in a table.

- 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 a 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 the data in a table:

- 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

You can determine which columns to see and how they appear using the **Manage Columns** option from the **View** menu. But the **Manage Columns** option isn't available for tables with flexfields. To check whether a table on a page contains flexfields, click your user image or name in the global header, and on the **Settings and Actions** menu, select **Highlight Flexfields**. If you don't have administrative privileges, you may not find the **Highlight Flexfields** option.

- **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.

Related Topics

- Use Query By Example
- What's included in the file I get when I export a table?
- How can I locate flexfields on a page?
- Overview of Flexfields

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 tasks:

- 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 follow these steps:

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.

Related Topics

- Operators and Wildcards for Query By Example

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.

Operator	Description
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.
or	Or

Here are a few things to know about the **>**, **<**, **>=**, and **<=** operators:

- Results are based on alphanumeric sort, in alphanumeric fields. For example, if you enter **>=ABC**, then ABC, ABD, ABCA, ACB, and BAC are matches, but not AB5 or AB.
- A space is considered part of the filter value. For example, if you enter **>= 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.

Wildcard	Description	Examples
*	Multiple characters	**Entered Value:** add* **Matches:** The word **add** and words beginning with **add**, such as **address**
_	Single character	**Entered Value:** exp_nse **Matches:** Words such as **expense** or **expanse**

Related Topics

- Use Query By Example

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.

Related Topics

- Guidelines for Using Desktop Integrated Excel Workbooks

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 aren't visible on the page.

In any case, some data might not be included in the following scenarios.

- 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.

6 Excel Add-Ins

Oracle ADF Desktop Integration Add-In for Excel

Set Up Desktop Integration for Excel

You can create or edit records and upload them to the application using integrated Excel workbooks. To use these workbooks, you must install an Excel add-in.

> **Note:** Every release of Oracle Fusion Cloud 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 information on the new version, see the relevant *What's New* document.
> - For information on the upgrade policy for the Oracle ADF Desktop Integration add-in, see: *Add-In Upgrade Policy for ADF Desktop Integration* (DOC ID 2242879.1) on *My Oracle Support*.

Install or Upgrade the Desktop Integration Add-In

To install or upgrade the Oracle ADF Desktop Integration Add-In for Excel, you must have the appropriate Excel and Windows version. See: *Supported Platforms for ADF Desktop Integration* (DOC ID 2242428.1) on *My Oracle Support*. Also, make sure that you have the Download Desktop Integrator (ATK_DOWNLOAD_DESKTOP_INTEGRATOR_PRIV) privilege to access the add-in installer.

1. Sign into your computer with your account.
2. Close Excel.
3. Click **Navigator** > **Tools** > **Download Desktop Integration** to download the installer file.
4. Run the `adfdi-excel-addin-installer-current-user.msi` installer just like you would run any program that you install on your computer.
5. Run Excel once to complete the installation.

> **Note:** If you have administrator privileges, you can also install the add-in for all users. For more information, see: *How to install the ADF Desktop Integration Add-in for Excel* (DOC ID 2681794.1) on *My Oracle Support*.

Related Topics

- Troubleshoot Desktop Integration for Excel
- Guidelines for Using Desktop Integrated Excel Workbooks
- Business User's Guide for ADF Desktop Integration

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 your changes to the application, avoid doing these tasks:

- Rename text from the integrated workbook, such as the worksheet names.
- Add columns.
- Delete any part of the template, such as columns.
- Hide required columns and status columns or headers.

CAUTION: Don't close Excel using the Windows Task Manager and clicking the **End task** button because that might disable the add-in.

Conventions

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

Statuses

You can use **Status Viewer** to see the status of the entire integrated worksheet and the status of any row in a worksheet. To use the status viewer, click **Status Viewer** on the Excel ribbon. You can see the status of the entire integrated worksheet by default. To see the status of a row, click any table row in a worksheet. You can use the information that appears on the **Status Viewer** to review and correct errors at the same time.

Searches

Some integrated workbooks include searches. To search within the workbook, you must first sign into the application. When you click the **Search** button, the application prompts you to sign in if you haven't already done so.

Refreshes After Upload

If your changes aren't reflected after you upload the records back into the application, you can try out these options:

- Refresh the table
- Use a filter or search on the table to see your changes

Related Topics

- Set Up Desktop Integration for Excel
- Troubleshoot Desktop Integration for Excel
- How You Use Tables

Troubleshoot Desktop Integration for Excel

If you run into any issues with the integration, use the Client Health Check tool first to find out what integration issues you might have and how to resolve them.

For more information, see: *How to use the ADF Desktop Integration Client Health Check Tool* (Doc ID 2010222.1) on *My Oracle Support*.

If the health check tool doesn't resolve your issue, you can uninstall and reinstall the Oracle ADF Desktop Integration add-in. For more information, see: *Information Center: Troubleshooting Oracle ADF Desktop Integration* (DOC ID 2012600.2) on *My Oracle Support*.

> **Note:** To check the version of Oracle ADF Desktop Integration, see: *ADFdi Version Check* (Doc ID 2012570.1) on *My Oracle Support*.

Uninstall the Desktop Add-In

Use the Microsoft Windows Settings to remove the ADF Desktop Integration add-in. After removing the add-in, you can use the integrated Excel workbooks on this system only after you reinstall the ADF Desktop Integration add-in.

1. Open **Windows Settings** and go to **Apps & features**.
2. Select **Oracle ADF Desktop Integration Add-In for Excel** from the list of programs.
3. Click **Uninstall** from the toolbar at the top of the program list.
4. When prompted, click **Uninstall** to remove the Oracle ADF Desktop Integration add-in.

> **Note:** If you have installed the Oracle ADF Desktop Integration add-in on multiple user profiles using the current-user installer, you must remove it from each user profile.

Related Topics

- Set Up Desktop Integration for Excel

Oracle Visual Builder Add-In for Excel

Use Oracle Visual Builder Add-in for Excel to integrate Microsoft Excel spreadsheets with REST services to retrieve, analyze, and edit business data from the REST service.

You can download your data to an Excel spreadsheet, work with it, and upload your changes back to the REST service. After you install the add-in, a new ribbon tab (**Oracle Visual Builder**) appears in Microsoft Excel. You can use the buttons in this ribbon tab to configure a worksheet to integrate with a REST service and download the data to a data table that you create in the worksheet. Once you create the data table and populate it with data, you can review, modify, and create data before uploading changes to the REST service. After you integrate the Excel worksheet with the REST service, you can optionally publish the Excel workbook that contains the integrated worksheet.

Related Topics

- Using the Oracle Visual Builder Add-in for Excel

7 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.

8 Data on Application Pages

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

Click your user image or name in the global header, and from the **Settings and Actions** menu, select **Print Me** (if available).

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.

Related Topics

- What's included in the file I get when I export a table?

Why can't I see all the values I expect in my list of values?

Probably your list of values (LOV) has more than 500 values. By default, any LOV displays a maximum of 500 values. So, if you can't see your LOV in the list, you can use the **Search** field to find specific values.

How can I locate flexfields on a page?

You can locate flexfields on a page using the **Settings and Actions** menu. Click your user image or name in the global header to open this menu, and select **Highlight Flexfields** to locate flexfields on a page.

You can hover over the **Basic Info** icon to see details about specific flexfields. Verify that you have the appropriate roles to view and configure the flexfields.

How can I enter or edit translated text in Fusion Applications?

1. For a row in a table or for a field in a form, click the icon for translations (where available).
2. Select a supported language, and view, edit, or enter the translated text.

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

What's the difference between Language and Source Language?

When a text value is created, the language that it's created in is considered as the source language in the translation editor. This value is used as the default one if no translated text is available.

When a translated text is entered, the source language value is updated to the language for that translated text. For example, suppose you have a row with text value created in American English. If you use the translation editor to update that row with the value for language as Spanish, the source language for that row will be updated to Spanish. So, a quick glance at the translation editor tells you which values are translated and which aren't. For example, if the values in the Language and Source Language fields match, that means the values are translated. While, if they don't match, that means the values aren't translated, and you can also tell where the default value is coming from. If the default value for a row's source language is changed, all values for the rows whose Language and Source Language fields match, will also change.

Why does the Date field display a different value than my preferred date?

By default, the **Date** fields that don't have any associated time values show the date in the server time zone, UTC, irrespective of your preferred time zone.

Also, if you're using the calendar date picker to set today’s date, the **Date** field gets populated with the current date in the server time zone, not your preferred time zone.

9 Scheduled Processes

What are scheduled processes?

Scheduled processes do tasks that are too complex or time-consuming to do manually, for example importing data or updating many records. You can run scheduled processes on a recurring schedule and send notifications based on how the process ends.

Some scheduled processes give you printable output. Those processes might have **Report** in their name.

Use the Scheduled Processes work area to run all the processes you've access to and to manage submissions. If you need access to this work area, ask your security administrator to assign you a role that gives you access, for example a custom role with the the Manage Scheduled Processes (FND_MANAGE_SCHEDULED_PROCESSES_PRIV) privilege. Other than the Scheduled Processes work area, you might be also able to run certain processes from other work areas.

Jobs and Job Definitions

Each scheduled process that you run is based on a job. The job is the executable that controls what the process does. Each job needs a job definition, which, for example, identifies the parameters and other options you've set for the process. You or your administrator can create job definitions for Oracle Analytics Publisher reports so that users can run the reports as scheduled processes.

Process Sets

A process set is a scheduled process that contains multiple processes or even other process sets. So, when you submit a process set, you're running more than process.

> **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 how, and which records are processed. For example, a process includes only the transactions that were edited by the person you select for a Last Updated By parameter. Some scheduled 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 scheduled process that contains at least two processes. So you can run many processes in one go, for a specific purpose.

Processes in process sets 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.

Related Topics

- Example of Process Details for a Process Set
- Submit Scheduled Processes and Process Sets
- What are scheduled processes?

Submit Processes

Submit Scheduled Processes and Process Sets

Watch video

Use the Scheduled Processes work area to run all the scheduled processes that you've access to, including process sets. You can also submit many processes from other work areas.

Some 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**.
2. On the Scheduled Processes Overview page, click **Schedule New Process**.
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, for example **Daily** or **Monthly**.
    - 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 you selected, define when the process should run.

Some processes can't be run more often than a certain frequency, for example more than every 10 minutes. But there are some situations where that validation doesn't apply, for example, when different users run that same process less than 10 minutes apart. Or, if you use a saved schedule that has an individual run in addition to the regular frequency, for example a schedule that runs every 10 minutes and once at five minutes after the first 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've more than one to choose from.
5. Select a format, for example one of these options:
    - **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. These notifications are in English and they show times in UTC, no matter what language and time zone the recipient has in their preferences.

1. Open the Notification tab.
2. Click **Create Notification**.
3. From the **Address Type** list, select whether you want to identify the recipient by their email address or user ID.
4. In the **Recipient** field, enter either the email address or user ID of the person you want to send the notification to.
5. In the **Condition** list, select when to send the notification, for example when the process ends in error.
6. Click **OK**.
7. To send notifications to more people, repeat steps 2 to 6.

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 a notification. This notification is in English and shows times in UTC, no matter what language and time zone you have in your preferences.
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.

> **Tip:** Note down the process ID for your submission if you might need to easily find it later. For example, let's say you set the process to run once a week. If you later want to cancel all runs on this schedule, you need to cancel this original submission with the process ID you see.

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**.

Whether you use the Notifications tab or the **Notify me when this process ends** check box, or both, notifications are sent when the entire process set ends, not when each process within the set ends.

Related Topics

- Examples of Process Options
- Example of Process Details for a Process Set
- View Analytics, Reports, and Dashboards
- View Status and Other Details for Scheduled Processes

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.

Here are a few things to know:

- 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. Here's the information you get for every process in the process set.

- Process Name: A process in the process set.
- Path: The step ID of the process, preceded by the step ID of the process set that the process is nested under, if any. Every process and nested process set in the process set that you're submitting is considered a step and has a unique step ID.

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

- Parent Process Set: The direct parent of the process, either the process set you're submitting or the process set that the process is nested under.

Scenario

Let's try to understand what we are looking at in the Processes tab. Say you're submitting a process set called Full Cleanse and Import, which contains a Clean Records process and a nested Quick Import process set. The nested process set has two processes, one of which is the same Clean Records process.

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

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

Process Name	Path	Parent Process Set
Clean Records	**CleanRec1**	Full Cleanse and Import
Import Records	**QuickImpo1.ImpoRec1**	Quick Import
Clean Records	**QuickImpo1.CleanRec2**	Quick Import

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.

Status	Description	Action Required?
Blocked	At least one other running process is incompatible with and currently blocking your process. The situation will be automatically fixed.	No (in progress)
Canceled	The process was canceled, and you can't restart it.	No (final)

Status	Description	Action Required?
Canceling	The process is currently moving to the Canceled status.	No (in progress)
Completed	The main part of the process completed, and postprocessing (such as sending notifications and generating output) has started.	No (in progress)
Error	The process finished running and ended with errors.	No (final)
Error Auto-Retry	The process ended with errors but will automatically run again.	No (in progress)
Error Manual Recovery	The process ended with errors and requires an administrator to move the process to a final state.	Yes
Expired	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.	No (final)
Finished	The process ran based on a schedule, and it's either a process set or a process that causes other processes to automatically run. Either way, all processes involved are done running.	No (final)
Hold	The process is put on hold and needs someone to release it before it can continue running.	Yes
Paused	The process is paused so that another process that was automatically kicked off can run first.	No (in progress)
Pending Validation	Some validations, for example related to security, are performed on the process before it runs.	No (in progress)
Ready	The process passed validation and is about to start running.	No (in progress)
Retrying	The process resulted in an error but will try again. It will automatically rerun at the time you see in the Scheduled Time column on the Scheduled Processes Overview page. The number of retries depends on how the job is set up. After all the retries, if the process still can't run successfully, it will end with the Error status.	No (in progress)

Status	Description	Action Required?
Running	The main part of the process is currently running.	No (in progress)
Schedule Ended	The last submission in a schedule has happened for a process that's either a process set or a process that causes other processes to automatically run. Either way, all processes involved have started running, but might not be done yet.	No (in progress)
Succeeded	The process successfully completed.	No (final)
Validation Failed	The process failed validation.	No (final)
Wait	The process passed validation but isn't running yet.	No (in progress)
Warning	The process finished running and ended with a warning, for example, that a notification wasn't sent.	No (final)

Related Topics

- View Status and Other Details for Scheduled Processes

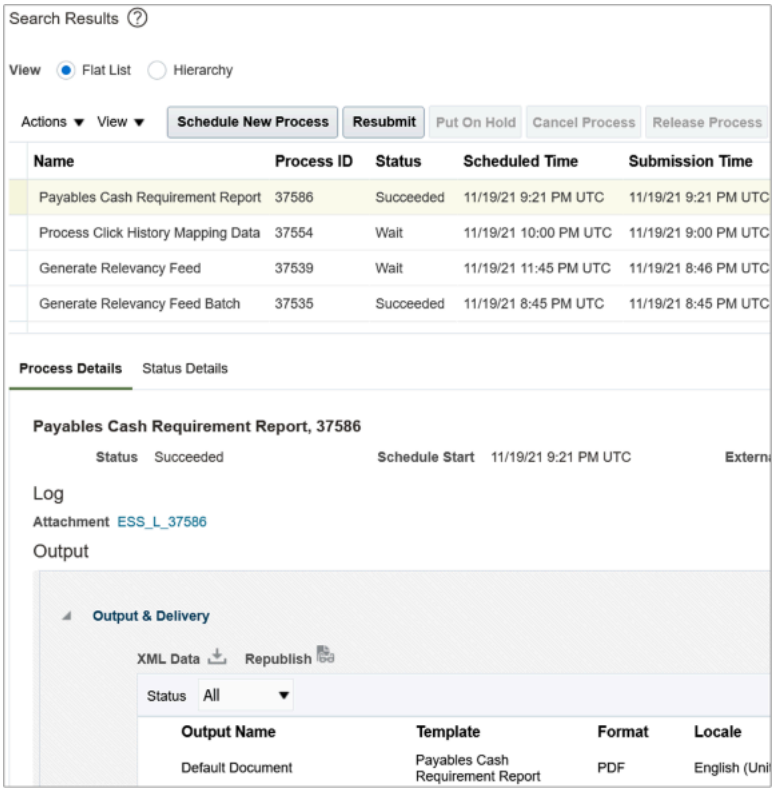
View Status and Other Details for Scheduled Processes

After you submit a scheduled process, you can track its progress. Processes can finish running in seconds, or a few minutes, or even longer.

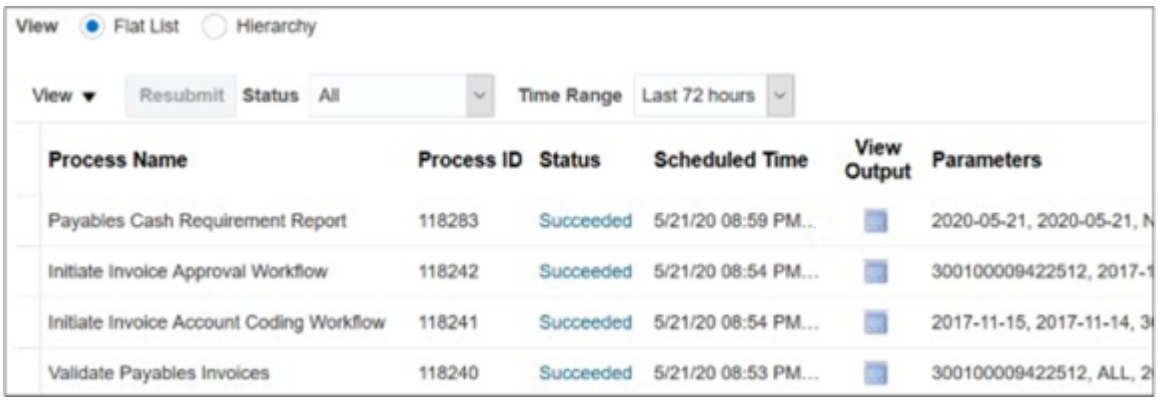
If something interrupts a process while it's running, for example a server restarting, then the process automatically picks up where it left off. If you need to see all processes, not just the ones you submitted, ask your security administrator to assign you a custom role that has the ESS Monitor Role (ESSMonitor) or ESS Operator Role (ESSOperator).

Here's where you can find processes that were submitted:

- Scheduled Processes work area



- Other work areas with a section for scheduled processes, if available.



Check the Status in the Scheduled Processes Work Area

Here's how you find your scheduled process and see how it's doing.

1. Click **Navigator** > **Tools** > **Scheduled Processes**.
   The Search Results table shows processes that were submitted in the last hour because the default saved search is **Last hour**. The table might be blank if nothing was submitted in the last hour.
2. If you don't see the process, click the **Refresh** icon or run a search. For the search, enter your own criteria or select another saved search. Here are a few examples of saved searches you can use:
   - Last 24 hours
   - Last 72 hours
   - Cancelable Processes

   > **Tip:** In the search results, select **Hierarchy** for the **View** option to see, for example, the structure of nested processes or process sets within a process set. For processes running on a recurring schedule, the parent node is the original submission, the child nodes each run in the schedule.If submission notes were entered when submitting the process, you can use the **Submission Notes** column to help identify the process.
3. Refresh the search results at any time to see the latest status of the process in the **Status** column. You can also check the **Start Time** column to see if the process has started running yet.

   > **Note:** Times such as start time and scheduled time are shown in the time zone you set in your preferences. If you change your preferences, you can see the change in the Scheduled Processes work area next time you sign in.
4. To get more details about the status, select your process in the Search Results table and open the Status Details tab. Here's some of the information you might find:
   - Status description, which explains what the current status means.
   - The position of the process with the Ready status, in the sequence of submitted processes. For example, if your process is queued up for submission at position 5, there are four processes that need to start running before your process starts.
   - Duration of a process, based on its current status.
     - How long process has been blocked: If a process is blocked, you can see how long it has been in the blocked status. For blocked processes, you can also expand the Incompatibility section to get information about which incompatible processes are preventing yours from running.
     - How long process has been running: If a process is running or completed, you can see how long it has been in the running status. If your process is in progress, and it's blocking other processes, you can also see IDs of those processes, which can't run until yours is done.
     - How long process took to complete: If a process is completed, you can see how long it took to complete with Error, Finished, Warning, or Succeeded status.
   - On the Status Details tab, you can also expand the Status of Items to Process section, if available.
     Here are a few things to know about the Status of Items to Process section:
     - This section isn't available for process sets. But, it's available for individual processes, including those within process sets, that are in these statuses:
       - Running
       - Completed
       - Succeeded

    - Error
    - Error Auto-Retry
    - Error Manual Recovery
    - Canceled
    - Canceling
    - Warning
    - Hold
    - Paused

  - If a specific process is predefined to show progress information through graphs, you can see that information in one or more graphs. For example, a process importing lines from a file might show a graph called Lines. You hover over parts of the graph to see how many lines are successfully imported, how many ended up in error, and how many are still pending. A process can have multiple graphs, depending on what it's working on.

5. With your process still selected in the Search Results table, optionally click the **View Log** button (if available), especially if information isn't available in the Status of Items to Process section. The type of information in the log varies, depending on the process. You can open the log from here only if the process is currently running. When the process is done, you might want to also take a look at the final log, if any, from the Process Details tab.

View Other Details in the Scheduled Processes Work Area

To get more information about a scheduled process, select it in the Search Results table and see the Process Details tab 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.

Monitor Scheduled Processes in Other Work Areas

Some work areas have a section where you can monitor the scheduled processes that were already submitted.

1. Go to the section if it's available, usually on the landing page of the work area.
2. Click the **Refresh** icon if you don't see any processes or need to see the latest status.
    - If you still don't see the process you're looking for, try changing the filters. If that doesn't help, use the Scheduled Processes work area instead.
    - If submission notes were entered when submitting the process, you can use the **Submission Notes** column to help identify the process.

3. Do either of these things 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 click the link in the **View Log** column to get information about how the process is running.

Related Topics

- Statuses of Scheduled Processes
- What do I get if I view scheduled processes in a hierarchy?
- View Output from Scheduled Processes
- Cancel or Make Changes to Scheduled Processes
- Resubmit Scheduled Processes and Process Sets

Cancel or Make Changes to Scheduled Processes

Life is full of second chances! After a scheduled 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've access to, you can even work on processes that someone else submitted. If you need to cancel processes that someone else submitted, ask your security administrator to assign you a custom role that has the ESS Administrator Role (ESSAdmin).

Make Changes to Processes

Select the scheduled process in the Search Results table. Here are some things you might be able to do.

Changes you can Make to Processes

Task	Prerequisite	Procedure
Edit Schedule Change the submission schedule, for example, to submit it biweekly instead of weekly.	This option is there only if you select the row with the process ID you got when you submitted the process to run on a schedule. The row should be the parent node when you view the search results in a hierarchy, and the status should be **Wait**.	From the **Actions** menu, select **Edit Schedule**.
Edit Output Change output options of a process, for example, from HTML format to PDF.	You can do this only if the process generates output, and hasn't started running yet.	From the **Actions** menu, select **Edit Output**.
Put On Hold Pause the process.		Click the **Put On Hold** button.

Task	Prerequisite	Procedure
Release Process Resume a process that's on hold so that it continues to run.		Click the **Release Process** button.
Change Process Priority Change the priority of a process to affect when it runs. When there are many submitted processes, those with a lower number, for example 2, would usually run before those with a higher number, for example 7.	You can do this only if your implementor has enabled priorities for scheduled processes, and you've a custom role that has the ESS Administrator Role (ESSAdmin). You can change priorities only for processes that have the **Blocked**, **Hold**, **Ready**, or **Wait** status.	Click the **Change Process Priority** button.

Note: Even if the process hasn't started, you can't change the parameter settings. You can cancel the process and submit again with the parameter values you want.

Cancel a Process

Select the scheduled process in the Search Results table, and click **Cancel Process**.

Cancel a Process Running on a Schedule

If you submitted a process to run on a schedule, for example once a day, you can cancel the scheduled runs even if some of the runs already happened.

1. Find the original submission, the row with the process ID you got when you submitted the process. The row should be the parent node when you view the search results in a hierarchy, and the status should be **Wait**.
2. Click **Cancel Process**.

   When you cancel this original submission, you cancel any current and future runs based on the schedule you had set.

What to Do If Processes Take a Long Time to Cancel

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.

Options and Descriptions

Option	Description
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.

Processes on Remote Servers

Some processes run on a remote server. Even if the status for the process that you hard or force canceled has 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 on the **Process Details** tab that appears after the table.

Option You Used to End Your Process	Field that Shows the Status of the Remote Process	Status of Process on Remote Server
Force Cancel	**Remote Process Status**	• **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.
Hard Cancel	**External Job Status**	• **Completed Successfully**: The remote process has successfully canceled. • **Running/Unknown**: Your scheduled process is in a Canceled state, but the remote process is still running.

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.

Related Topics

- View Status and Other Details for Scheduled Processes
- Allow Updates to Scheduled Process Priority

Resolve Blocked or Incompatible Processes

If your scheduled process has a Blocked status, that means another process that's currently running is incompatible with your process and preventing your process from starting. Incompatible processes can't be running at the same time.

A process can be self-incompatible, which means it can't start if another submission for the same process is currently running. For example, if you get an error in the log saying that one or more requests are currently pending for definition, that means the process is self-incompatible.

There are two types of incompatibilities:

- Global: Incompatible processes can never run at the same time, including self-incompatible processes.
- Domain-Specific: Processes are incompatible only if they also have another matching criterion. So you might see that two processes are shown as incompatible, but notice that other submissions for the same two processes are running at the same time.

If you were able to submit a process but it's now blocked, here's how you can find what's incompatible:

1. Click **Navigator** > **Tools** > **Scheduled Processes**.
2. Select your process in the Search Results table and open the Status Details tab.
3. Expand the Incompatibility section to see which processes are incompatible with yours.

When you have a blocked process, you can go with one of these options:

- Wait for the incompatible process to finish running so that yours can start. Optionally find that process in the Search Results table and track its status.
- Cancel the incompatible process. For processes running on a schedule, view search results in a hierarchy and cancel the child node the represents what's currently running. Even after you cancel, it's possible your process won't start immediately, depending on how many other submissions there are.
- Put the incompatible process on hold so that your process can run. You might need to resubmit your process. For processes running on a schedule, view search results in a hierarchy and put on hold the child node the represents the next run. Release the process after yours is done running.

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. You might be able to see the output from other work areas too.

When You're In the Scheduled Processes Work Area

Here's what you do:

1. Click **Navigator** > **Tools** > **Scheduled Processes**.
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 on the Process Details tab.
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, follow these steps:

a. Click the **Republish** button.
b. Click the **Actions** icon.
c. Select **Export**, and then select a format.

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

Note: On the Process Details tab, if you don't see an Output subsection, look for a Log and Output subsection. The output might be there instead as an attachment. This is likely if the Output tab isn't available when you submitted the process in Advanced mode.

When You're In Other Work Areas

Some other work areas have a section, usually on the landing page of the work area, where you can monitor the scheduled processes that were already submitted. In the table there, find your process and click the **Output** icon in the **View Output** column.

Related Topics

- Submit Scheduled Processes and Process Sets

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.

Resubmit Processes

In the Scheduled Processes work area, here's how you resubmit 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**.

Some other work areas have a section, usually on the landing page of the work area, where you can monitor the processes that were already submitted. In the table there, you can also select your process, see its parameter values, and click the **Resubmit** button.

Resubmit Process Sets

Resubmit process sets from the Scheduled Processes work area, not other work areas.

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**.

Both options to resubmit are available for process sets in either of these situations:

- The process set has any of the statuses in a final state, for example Succeeded or Canceled.
- The process set ran on a schedule and has either the Wait or Schedule Ended status. The option applies only to the original submission, the row with the process ID you got when you submitted the process to run on a schedule. The row would be the parent node when you view the search results in a hierarchy.

Related Topics

- Submit Scheduled Processes and Process Sets
- View Status and Other Details for Scheduled Processes

FAQs for Scheduled Processes

Which role gives me access to the Scheduled Processes work area?

Any that has the Manage Scheduled Processes (FND_MANAGE_SCHEDULED_PROCESSES_PRIV) privilege. Ask your security administrator to assign you a custom role with this privilege.

Why can't I see Scheduled Processes in the Navigator or home page?

If you have a role that should give you access, but you still can't see Scheduled Processes in the Navigator or on the home page, it's possible that the work area isn't currently available to anyone.

Your administrator should make sure in the Structure work area that **EL Expression** is selected for the **Show on Navigator** list, and the EL expression is this:

```
#{(securityContext.userGrantedResource
['resourceType=FNDResourceType;resourceName=FND_Scheduled_Processes_Menu;action=launch'])}
```

Why can't I find the scheduled process that I need to run?

It's possible that you don’t have access to it. Ask your security administrator to assign you a role with the privilege that gives you access to that process. This is especially likely for custom processes.

When your administrator creates a new job definition, a new privilege is automatically created, and it's not assigned to anyone by default.

What's the maximum number of scheduled processes that can run at the same time?

It depends on the setup for your cloud service. If you need more information, contact your help desk.

What do I do if I can't find scheduled processes that were already submitted?

Some of the work areas where you do your business tasks might have a section you can use to monitor scheduled processes.

If the process you're looking for here was submitted before anything in the Time Range filter, then go to the Scheduled Processes work area (**Navigator** > **Tools** > **Scheduled Processes**). There, you can set the Submission Time criterion, for example, to search for processes that were submitted after a certain date or between the dates you specify.

If you're in the Scheduled Processes work area and still can't find your process, check if you've noted somewhere when the process was submitted or when it ran. Processes that finished a while ago might not be available any more. Processes can be kept for at most 60 days, but it might be much shorter, for example 7 or 15 days.

What do I get if I view scheduled processes in a hierarchy?

When you select **Hierarchy** for the **View** option, you might see some search results in a hierarchical structure. Here are some possibilities for what the hierarchy can represent.

Hierarchy View

Parent Node	Child Nodes
A submitted process set.	The nested processes or process sets within the submitted process set.
A process or process set submitted to run on a schedule.	Each run in the schedule.
A process or process set that causes other processes to run automatically.	The other processes that run.

Related Topics

- Process Sets

Why doesn’t the time zone for a submitted process match the time zone I used to submit or search for the process?

When you submit a process, you can select the time zone to use to define a recurring schedule.

You can also click the **Process Options** button and set a time zone just for that submission, which affects for example any parameters and output. When you search by submission time in the Scheduled Processes work area, you can also select a time zone.

But, when showing information about processes that were already submitted, the work area always reflects the time zone you set in your preferences. For example, this applies to the scheduled start time you see in the Search Results table and the Process Details tab. If you change your preferences, you can see the change in the Scheduled Processes work area next time you sign in.

How do I cancel or make changes to scheduled processes that are submitted to run on a recurring schedule?

First, if you can, find the process that was submitted on a recurring schedule by its process ID.

If you don't have the process ID, here's how you find it:

1. In the Scheduled Processes work area, search by the process name, the Wait status, and a submission time before the current date.
2. For the search results, select **Hierarchy** for the **View** option.
3. Select the parent node that represents the process submitted to run on a schedule.

With the process selected in the Search Results table, select what you want to do from the Actions menu. For example, **Edit Schedule** to change the end date or frequency, or **Cancel Process** to cancel the original submission and all remaining runs.

If the **Edit Schedule** option isn't available, it's likely that the process was submitted outside the application, for example through a SOAP web service. And, the schedule was defined with iCalendar in a way that doesn't map to what you can define on the Edit Schedule page.

Why can't I force cancel a scheduled process?

The **Force Cancel** option is available only if the process has already been canceling for more than 30 minutes.

For some processes, you get a **Hard Cancel** option instead, which is available soon after you cancel the process. Which option you get depends on the 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 counts** check box to include an **Items to Process (Success/Error/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.

Why don’t notifications reflect my language or time zone?

All notifications for scheduled processes are in English and show times in UTC, no matter what language and time zone you have in your preferences.

This applies to notifications you get when you select the **Notify me when this process ends** check box. Or, when you set up notifications in the Notifications tab when you're submitting the process in Advanced mode.

Can I get notified every time a process within a process set ends?

No, notifications are sent only when the entire process set ends, not when each process within the set ends.

What happens to processes scheduled by a user who is no longer here?

If a user is inactive, for example because they left the company, the processes they submitted on a recurring schedule won't run.

For security reasons, it's best that you cancel that submission and schedule a new one if still needed. The same situation applies to users who are locked or failed to authenticate.

Why am I getting an error about view definition not being found, when submitting a job definition?

When you're submitting a custom job definition, this error is sometimes shown, if the custom job was created by a user whose user name contains spaces.

Ask your administrator to create the custom job definition, using a user name that doesn't contain spaces.

What do I need to do if my scheduled process is stuck in canceling status for long in Fusion Applications?

Select the scheduled process and use the **Actions** menu from the Search Results table of the **Scheduled Processes** work area to end it.

This table provides information on the options you get depending on the process.

Option	Description
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. Even if the status for the process that you hard or force canceled has 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 on the **Process Details** tab that appears after the table.

This table lists the options you can use to end your process.

Option You Use To End Your Process	Field that Shows the Status of the Remote Process	Status of Process on Remote Server
Force Cancel	Remote Process Status	• Completed Successfully: The remote process was successfully canceled within the 30 minute grace period. • Running or 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.
Hard Cancel	External Job Status	• Completed Successfully: The remote process has successfully canceled.

Option You Use To End Your Process	Field that Shows the Status of the Remote Process	Status of Process on Remote Server
		• Running or Unknown: Your scheduled process is in a Canceled state, but the remote process is still running.

If **Force Cancel** is unavailable, act according to your specific scenario listed in this table.

Scenario	Action
Less than 30 minutes have passed since the cancellation was initiated.	Let the cancellation process run for at least 30 minutes. After this time, check the status of the scheduled process again. If Force Cancel becomes active, you can use it.
The process is synchronous.	If a synchronous process remains in canceling status and the Force Cancel option isn't available, you can contact your help desk.
The process is a parent of recurring asynchronous processes.	Check the status of all child processes. When all associated child processes are in a canceled status, the status of the parent process will automatically update from Canceling to Canceled.

Where to Find Information About Specific Scheduled Processes

Here's some information about specific scheduled processes that you might have access to, depending on the products you're using and the roles you have. This isn't a comprehensive list of all available processes.

- Common features
  See: *Where to Find Information About Common Scheduled Processes*
- Oracle Fusion Cloud Sales Automation and Oracle Fusion Cloud Fusion Service
  See: *Where to Find Information About Oracle Sales Scheduled Processes*
  See: *Where to Find Information About Fusion Service Scheduled Processes*
  See: *Where to Find Information About All Common CX Scheduled Processes*
- Oracle Fusion Cloud Financials
  See: *Where to Find Information About Financials Scheduled Processes*
- Oracle Fusion Cloud Human Capital Management
  See: *Where to Find Information About HCM Scheduled Processes*
- Oracle Fusion Cloud Procurement
  See: *Scheduled Processes for Procurement*
- Oracle Fusion Cloud Project Management
  See: *Where to Find Information About Scheduled Processes in Projects*

- Oracle Fusion Cloud Student Management

  See: *Where to Find Information About Student Management Scheduled Processes*
- Oracle Fusion Cloud Supply Chain & Manufacturing

  See: *Scheduled Processes for SCM*

Related Topics
- Best Practices for Scheduled Processes in Fusion Applications

Where to Find Information About Common Scheduled Processes

Here are many of the scheduled processes that are available as part of common features.

Approvals and Workflow

- Archive Transaction Console Completed Transactions

  See: *Archive and Purge Transactions*
- Create Search Index for Worklist

  See: *Set Up the Approvals Work Area*
- Employee Vacation and Delegation Rules Report

  See: *Review Employee Vacation and Delegation Rules*
- Extract Workflow Tasks for Archive

  See: *How Workflow Tasks Are Archived and Purged*
- Process Translations for Workflow Tasks Archive

  See: *How Workflow Tasks Are Archived and Purged*
- Refresh Transaction Administrator Console Transaction Status

  See: *Automatically Refresh Transaction Statuses*
- Run Reassign Pending Approvals for Terminations and Correct Invalid Supervisor Assignments Process

  See: *How You Can Regularly Reassign Pending Approvals for Workers That Become Inactive*
- Synchronize Notifications in Global Header

  See: *How do I sync in-app notifications for all users in Fusion Applications?*
- Upload Workflow Task Attachments for Archive

  See: *How Workflow Tasks Are Archived and Purged*

Business Intelligence

- Create Rules XML File for BI Extender Automation

  See: *Overview of the Essbase Rule File and Cubes*
- Import Oracle Fusion Data Extensions for Transactional Business Intelligence

  See: *Overview of Flexfield Change Import*

Data

- Diagnose and Synchronize Application Data

  See: *Diagnose and Synchronize Application Data*
- Load Interface File for Import

  See: *Load Interface File for Import Process*
- Purge Interface Tables

  See: *Purge Interface Tables*

Flexfields

- Upload Comma-Separated Value Files for Import Process

  See: *Upload Comma-Separated Values File for Import Process*
- Upload Value Set Values

  See: *Upload Value Set Values Process*
- Synchronize Flexfields with Business Objects

  See: *How can I resolve synchronization issues between flexfields and business objects in Fusion Applications?*

Search

- ESS job to create index definition and perform initial ingest to OSCS

  See: *What do I do if I get errors about enabling the search extension framework?*

  See: *What do I do if I get errors stating that the Oracle Search Cloud Service or OSCS isn't reachable?*
- ESS job to run Bulk ingest to OSCS

  See: *Enable Search Extension Framework*
- ESS process to check Search Cloud Service availability

  See: *What do I do if the process for creating indexes keeps failing?*

  See: *What do I do if I get errors stating that the Oracle Search Cloud Service or OSCS isn't reachable?*

Security

- Import User and Role Application Security Data

  See: *Configure the Security Console*
- Import User Login History

  See: *Schedule the Import User Login History Process*
- Inactive Users Report

  See: *Inactive Users Report*
- Locked Users

  See: *View Locked Users and Unlock Users*
- Password Expiry Report

  See: *Password Expiry Report*
- Retrieve Latest LDAP Changes

  See: *Retrieve Latest LDAP Changes*
- Send User Name and Password Email Notifications

  See: *How can I notify users of their user names and passwords?*
- User and Role Access Audit Report

  See: *User and Role Access Audit Report*
- User Password Changes Audit Report

  See: *User Password Changes Audit Report*
- User Role Membership Report

  See: *User Role Membership Report*

Trees

- Manage All Trees Operations Centrally

  See: *Copy, Audit, and Flatten Tree Versions Using a Scheduled Process*

Related Topics

- Best Practices for Scheduled Processes in Fusion Applications

10 Transactional Business Intelligence (OTBI) Analyses, Dashboards, Reports, and Infolets

Reporting and Analytics: Overview of Analyses, Dashboards, Reports, and Infolets

In OTBI reporting and analytics, you analyze business intelligence analyses, dashboards, and reports to gain insight that you can act on and use to meet specific requirements.

You can use different types of predefined analytics, dashboards, reports, and infolets 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.

Object	What It Displays	What You Use It For
Analysis	Data in an interactive format, for example a table or graph.	Summarize or break down simple, real-time data, which helps you in taking short-term decisions.
Dashboard	A collection of analyses and other content, presented on one or more pages, or tabs.	Get various pieces of information about a particular subject.
Report	Data in a predefined format that provides little or no interaction.	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.

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

- View Analytics, Reports, and Dashboards

View Analytics, Reports, and Dashboards

Watch video

There are different ways to view and work with your analytics and reports. You can view analyses, dashboards, and reports in the course of your work, on your usual pages and infolets. Or you can find them in the business intelligence catalog with the Reports and Analytics work area and the Reports and Analytics panel tab.

View Analytics in Infolets

Use your favorite infolet pages to find analytics.

1. Use the page controls and Previous and Next icons to explore infolet pages in the home page, where they may appear in infolets with summaries and aggregations or performance metrics. You may also find infolets in some work areas.
2. Click an infolet to open a detailed analysis. So for example, if an infolet has transactions summed to a total, click it to view details of the underlying transactions.
3. Click **Done**.

View Objects in Familiar Work Areas and Pages

Use analyses, dashboards, and reports available in your usual pages and work areas.

1. Explore your pages. Some may include analysis and report links or embedded objects, sometimes in tabs or panel tabs.
2. Some work areas have a Reports and Analytics panel tab, where you explore catalog folders for relevant analyses and reports for the work area. And if you have permission, you can map more objects to the work area if they're appropriate.
    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 open 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, or report you have access to. It opens at the highest level of the catalog's folder hierarchy with all objects you have marked as favorites.

Here are some things you can do in the Reports and Analytics work area.

1. Click **Navigator** > **Tools** > **Reports and Analytics**.
2. Filter and search for objects:
    a. From the Filter list, select what you want to find.
    b. To view objects you have marked as favorites, select **Favorites** in the list. Or select **Recent Items** to view objects you recently worked with, or a recent search to run it again. Enter a name or part of a name and click the **Search** icon.
    c. In the search results, use the icons to identify what the objects are.
    d. Click the name of an object to open it, or click **More** and select an action.
3. In the breadcrumbs, browse the catalog folders for analytics and reports. Click any **Hierarchical Selector** icon to select a different node for the next level in the hierarchy.
4. Mark objects as favorites.
    - Select **Favorites** in the Saved Searches to display your favorite objects.
    - Click the **Add Favorites** icon for an object to mark it as a favorite.
    - Click the **Remove from Favorites** icon to remove an object from your favorites.
5. Create and edit analyses and reports.
    a. Click **Create** and select **Report** or **Analysis**.
    b. Use wizards to create your analysis or report.
6. Click the **Browse Catalog** button (or click the **More** icon for a specific report, dashboard, or analysis) to use more features.

> **Note:** If you don't see an analysis in the work area, browse the catalog for it. In the Catalog, select Show Hidden Items to display any hidden analyses.

View Analyses

An analysis queries against your company's data and answers business questions with visualizations, such as charts and tables. They may appear on your pages, or as parts of a dashboard.

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.
4. Click **Export** to get analysis data in various formats, for example PDF, Excel, PowerPoint, comma-separated value (CSV), and XML.

> **Note:** When you export data in a CSV format, dates are exported in raw format and converted to UTC time zone.

View Grouped Analyses in Dashboards

Some analyses are grouped in dashboards to give you meaningful related information. A dashboard contains pages of analyses, prompts that filter information, and other objects.

1. From the catalog folders or search results, open a dashboard to view.
2. Select values for any 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, open a report.
2. Click the **View Report** icon if you want a different format.
    - Choose **HTML** or **PDF** to display the report in a format for printing. Because it's optimized for printing, PDF often provides the best 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 do these tasks:
    - Click **Edit** to edit the report properties, layout, and data model.
    - Click **Report History** to see details about past submissions of the report.
    - 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.

- See the Analyze and Report page for your cloud services in the Oracle Help Center (http://docs.oracle.com).
    - Enterprise Resource Planning
      See: *Financials Reports and Analytics*
      See: *Procurement Reports and Analytics*
      See: *Project Portfolio Management Reports and Analytics*
      See: *Risk Management Reports and Analytics*
    - Human Capital Management
      See: *Global Human Resources Reports and Analytics*
      See: *Talent Management Reports and Analytics*
    - Customer Experience

See: *CX Sales Reports and Analytics*

See: *Loyalty Reports and Analytics*

- Supply Chain Management

See: *Supply Chain Management Reports and Analytics*

- Public Sector

See: *Public Sector Reports and Analytics*

- On these pages, you can review videos, guides, lists of predefined reports and analytics, and other resources for using and creating analytics and reports.

Infolets

Overview of 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 in an infolet that you need to follow up on.

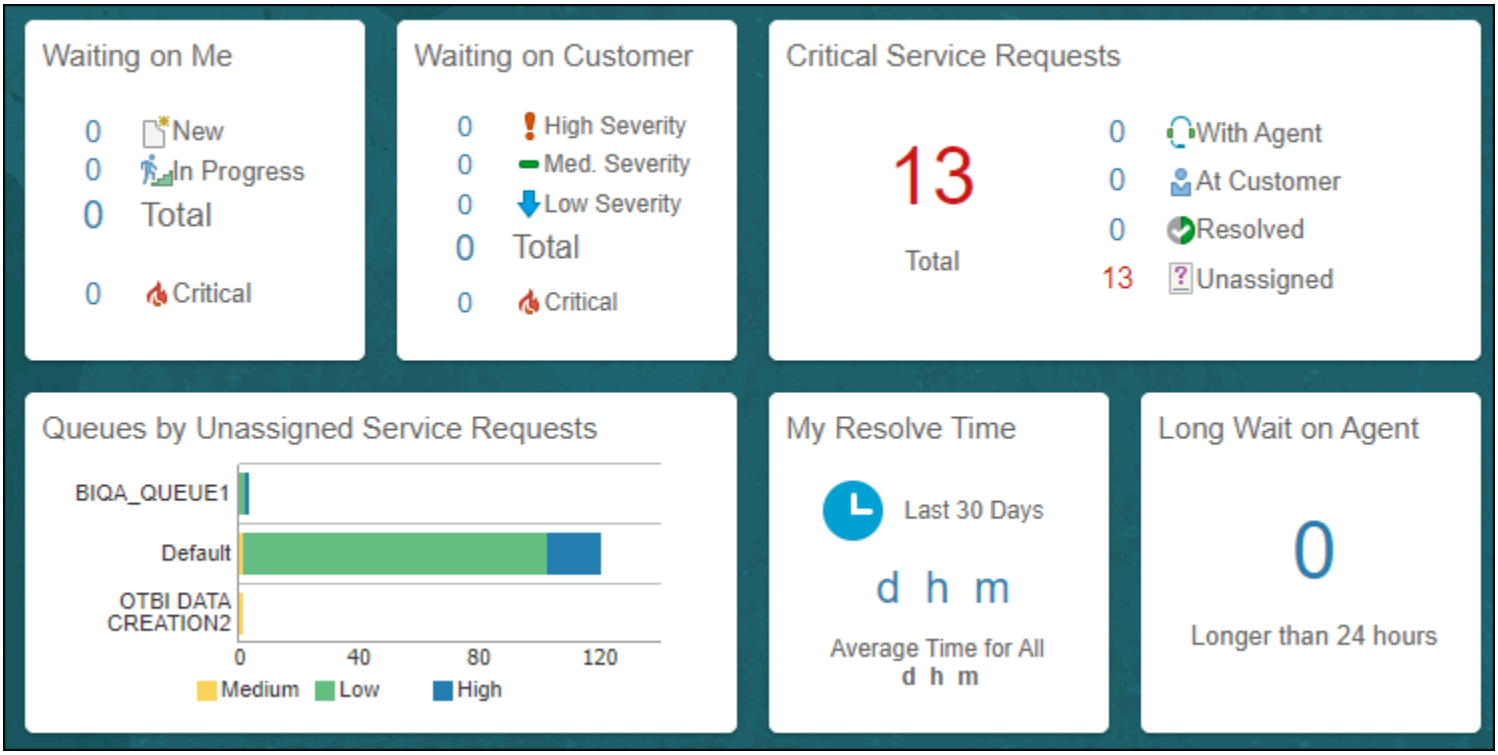
You can use infolets arranged in tabs in the Analytics section of your home page.

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 infolet 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 infolets. For example, you can move or hide them on the infolets page.
- If you don't see infolet pages on your home page, then your administrators must have disabled them to show on the home page.

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

Here's how an infolet page looks.



Personalize Infolets

You can personalize the infolets on your infolets page, such as you can edit their titles and views, move them, or hide or show specific infolets on the infolets page.

Edit Infolet Titles and Views

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

You can change the position of an infolet within an infolet page.

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

- How can I configure how infolets are displayed in Fusion Applications?

How You Use and Personalize Infolets in Oracle Fusion Cloud SCM and Procurement

Oracle Fusion Cloud Supply Chain & Manufacturing (SCM) and Oracle Fusion Cloud Procurement 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 these 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've 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.

Related Topics

- Infolets for New Item Requests

11 Audit

Audit Reports

You can use the Audit Reports work area to view changes to the application data, such as the business objects that were created, updated, and deleted.

To view the history or to create a report, you must have a role with the View Audit History (FND_VIEW_AUDIT_HISTORY_PRIV) privilege assigned to it. For appropriate assignment of roles and privileges, check with your security administrator.

Audit Events

Transactional events in the application trigger the audit process based on the create, update, and delete operations. For events to trigger the audit process for the business objects, you must first enable the objects for auditing.

These are the events that trigger the audit process.

Transactional Event	When the Audit Activity is Triggered	Audit Report Content
Create	Whenever business object data is created and stored in the database	• Name of the created object • Name of the user who created the object • Time of creation
Update	Whenever the existing business object data is updated	• Both old and updated values of the object • Name of the user who updated the object • Time of updating
Delete	Whenever the existing business object data is removed from the database	• The last value that the object attributes contained • Name of the user who deleted the object

The event details are stored in the audit table. The attributes of the audited object data can be used in lookups and foreign keys to display values in the audit history. The application supports displaying the audited information according to the language settings configured.

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 Fusion Applications. For details on events used in the Oracle Fusion Middleware products, refer to the Oracle Fusion Middleware documentation. See: *Introduction to Oracle Fusion Middleware Audit Framework*

Related Topics

- View Audit Reports

View Audit Reports

You can view the audit report for the business objects that are enabled for auditing. Remember, to view the history, or to generate a report, you must have a role with the View Audit History (FND_VIEW_AUDIT_HISTORY_PRIV) privilege assigned to it.

1. Click **Navigator** > **Tools** > **Audit Reports**.
2. On the **Audit Reports** page, specify the search criteria.

   Here's what some of the search criteria are for:

Search Parameter	Description
Product	Displays all the products that are available for auditing. **Note:** The checkboxes in the **Search Results** section are enabled or disabled based on the product selected.
Business Object Type	○ Narrows the search results to a specific business object, within the selected product. ○ Enables the **Show User-Related Details**, **Show Attribute Details**, and **Show Additional Object Identifier Columns** checkboxes in the search results. **Note:** If you're generating the audit history report of a scheduled process, you must select the **Business Object Type** for your product. Otherwise, you'll get a blank report.
Include child objects	○ Displays all the child objects that were listed for a business object when audit was set up. For example, a sales order object that contains several items as child objects. ○ Objects are displayed at the immediate parent-child level only. To view the children at subsequent levels, select the child object as the business object type and search again.
Include attachment details	This checkbox is displayed only when you select a business object associated with attachments. ○ Displays additional event types for attachments in the **Event Type** list. These event types include the check-in, checkout, and download options for the attachments. ○ Based on the selection, information about the check-in, checkout, and download actions done on attachments are displayed in the search results.
Show User-Related Details	Displays the user ID. **Note:** For legacy data, also displays the name and ID of the impersonator who updated the objects during an impersonation session.
Show Attribute Details	○ Enables the attribute list so that you can select either all attributes, or a specific attribute to view the changes.

Search Parameter	Description
	◦ Based on the selection, the search results indicate whether an attribute is created, updated, or deleted, and the corresponding old and replaced values.
Show Additional Object Identifier Columns	◦ 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.

For example, to get the audit report for all the insert and update operations of the business object type *Item*, belonging to the product *Product Hub*, use these search parameters:

- From the **Product** list, select **Product Hub**.
- From the **Event Type** list, select **Object Data Insert** and **Object Data Update**.
- From the **Business Object Type** list, select **Item**.

You can also specify any other details from the search criteria.

3. Click **Search**.

   In the Search Results section, you can see the audit report.

> **Tip:**
> - You can select the checkboxes in the Search Results section to view more information.
> - Audit search results have limits on the amount of data they can process and so may not show all records that meet your search criteria. You can try these solutions:
>   - Refine your search criteria and try again.
>   - You can export up to 10,000 records per entity in either Excel or CSV format. While exports usually contain all data, bulk jobs exceeding this limit will only include the first 10,000 records.
>   - Run the **Generate Audit Report** scheduled process to display all records.

Related Topics

- Submit Scheduled Processes and Process Sets

Why is Last Update Date Different from Creation Date?

Last Update Date in the audit report indicates when the changes to existing records were saved. For new records, this Last Update Date might differ from the **Creation Date**.

That's because the Creation Date only indicates when the record creation began, and not when the changes were saved.

Why can't I see all the records in the generated report?

Your report might have more number of rows than the set limit.

You can try one of these solutions:

- Contact your administrator to increase the limit.
- Refine your search criteria and search again.

> **Tip:** In such cases, usually, a message is displayed in the last row of the report. You can follow the suggestions in the message and run the report again.

Can I get an Audit Report on changes made to the Audit Policy?

Yes, all the changes made to the products on the Manage Audit Policies page are audited and you can view them in a report.

You can get a report on any of these activities:

- Changing the audit level
- Enabling or disabling auditing for a business object
- Adding or removing business objects and attributes

To get the audit report on changes made to the audit policy, specify these search criteria:

- From the **Product** list, select **Audit Policies**.
- From the **Business Object Type** list, select **Oracle Fusion business objects and attributes**.

Related Topics

- View Audit Reports

Why are unchanged columns showing up in the Audit Report?

After you enable auditing for columns and view the audit report, the newly audit-enabled columns show up in the audit report, even if you haven't changed the values in the columns.

This happens because, before the columns are enabled for auditing, changes (if any) in those columns aren't written to the audit table. After auditing is enabled, these columns are also added to the audit table, and displayed in the audit report.

For example, consider three columns, say, C1, C2, and C3, created on 1 Jan 2023. You add values in C1 and C2 columns.

Your database table displays these values.

C1	C2	C3	Last Update Date
c1value1	c2value1	null	01-Jan-2023

You enable auditing only for the C1 column, so the corresponding audit table will have these values.

Remember, the **Last Update Date** column is always audited.

C1	C2	C3	Last Update Date
c1value1	null	null	01-Jan-2023

Three months later, you update the value in the C1 column and add a value in the C3 column.

Database table will have these values.

C1	C2	C3	Last Update Date
c1value2	c2value1	c3value1	01-Apr-2023

The corresponding audit table now has two rows, displaying the latest change for the audit-enabled C1 column.

C1	C2	C3	Last Update Date
c1value1	null	null	01-Jan-2023
c1value2	null	null	01-Apr-2023

Again, two months later, you turn on auditing for C2 and C3 columns. And update the value in the C1 column.

Database table will now have these values.

C1	C2	C3	Last Update Date
c1value3	c2value1	c3value1	01-Jun-2023

The corresponding audit table now has three rows.

C1	C2	C3	Last Update Date
c1value1	null	null	01-Jan-2023
c1value2	null	null	01-Apr-2023
c1value3	c2value1	c3value1	01-Jun-2023

Although the C2 and C3 columns were last updated on 1 April 2023, the audit table shows these columns are updated on 1 June 2023. The audit table is added with the snapshot of the row, every time an update is made for the audit-enabled columns. But here, the update for columns C2 and C3 is that they were enabled for auditing. Going forward, the audit table will be updated for C2 and C3 columns only if there's any change in the values in these two columns.

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 an application-related error, the message might say that your help desk is notified. 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) and inform your help desk.
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, 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.

Related Topics

- Run Diagnostic Tests
- Run Diagnostic Tests to Verify, Troubleshoot, and Analyze
- Record Issues to Troubleshoot
- What's an incident?
- How can I find information about specific issue recordings?

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:

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:

Input Status	Action
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, here are a few things to do:
    - If the Details of Required Test Components column contains the name of Oracle Fusion Cloud Applications, 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	Description
Run Now	Runs the selected test or tests immediately after you click **Run**.
Run Later	Schedules when the test or tests are run, if this option is available. 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: a. Click the **Schedule Run** button. b. In the Schedule Tests dialog box, click the Schedule tab and select **Use a Schedule**. c. From the **Frequency** menu, select how often to run the selected test or tests. d. In the **Start** field, specify the date and time at which to start testing. e. Click **Submit**.
No Prerequisites	Runs the selected test or tests without running the prerequisite tests.
Run in Parallel	Runs the selected test or tests using multiple threads. The default value is 3, and you can select any value from 2 through 5.
Run Synchronously	Runs the selected test or tests using a single thread.

11. Click **Run**.

Related Topics

- View the Status and Result of a Diagnostic Test
- Cancel an Initiated Diagnostic Test
- Run Diagnostic Tests to Verify, Troubleshoot, and Analyze

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 these statuses:
   - 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 an error occurs, 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 have no validation errors, but there are issues that you can't fix yourself, you can submit an incident. The help desk reviews the incidents to identify the cause of the issue.
7. Your help desk troubleshoots the issue, suggests 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 agent and you notice discrepancies in a specific purchasing document.
2. You search the 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 that contain all the details about the particular purchasing document.

5. You identify the reason for the discrepancies and resolve the issue yourself.

Related Topics

- Run Diagnostic Tests
- What's an incident?

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.

Related Topics

- Run Diagnostic Tests
- Run Diagnostic Tests to Verify, Troubleshoot, and Analyze

Submit a Diagnostic Test Result as an Incident

After you run a diagnostic test, if you observe any errors, you can submit the error details to your Oracle Support for analysis. Here are the steps to add a test to an incident.

1. On the Diagnostic Dashboard, go to the **Run Status** section.
2. Click the **Find** list and select a relevant option to display the list of tests. Or, click the **Search Test Runs** icon and specify a criteria to display the diagnostic test.
3. Select the diagnostic test that you want to submit and click **Add to Incident**.

4. On the Select Incident dialog box, enter the following details:
    - ADR Home: Search for and select the path of the Automatic Diagnostic Repository where you want to store this test as an incident. If you don't know the path, check with your help desk.
    - Problem: Select the predefined problem key to associate the test result with.
    - Incident: Select the predefined incident type.
5. Click **OK**. You receive a confirmation that the test run report is successfully added to the specified incident and stored in the specified ADR path.

Results:

Your Oracle Support team will be able to view this incident on their workbench dashboard.

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.

Related Topics

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

FAQs for Troubleshooting

What's a help desk?

Your help desk might be an online tool, a team of people, or some other resource in your enterprise that assists you when you run into problems with the software you're using.

If you contact your help desk to help you fix a software error, provide the full text of the error message you received, including the message number.

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 when the problem occurred.

If you get an error message for an issue severe enough to prevent you from continuing your work, you can submit an incident. Any diagnostic tests associated with the error message are added to the incident, along with the test result. Your help desk can view the incidents and suggest corrective action.

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.

Related Topics

- What are scheduled processes?

How does the help desk access and review the diagnostic information?

For application errors that you can't resolve yourself, your help desk can review the message diagnostic information and attempt to resolve the issue.

Diagnostic messages contain different components:

- **Message Text** and **Message Details**: Describe the problem and are visible only to the users.
- **Admin Details** and **Admin Action**: Contain additional information meant for the help desk to guide them with the resolution.

> **Note:** For your help desk to view the **Admin Details** and **Admin Action** components of a diagnostic message, set the profile value for the **Message Mode (FND_MESSAGE_MODE)** profile option to **Administrator**.

13 Help

Get Help in the Application

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

Watch video

If you have an issue that you still can't resolve, you might need to contact your help desk or try to troubleshoot yourself if possible, for example by running diagnostic tests.

Use Help Windows

Here's what you do:

1. Click a help icon. The help window gives you information specific to the page or part of the page that the icon is on.
2. In 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 sharing or downloading the help.
3. Most of the links open guides in the Oracle Help Center.
    - Use the **Contents** panel to move around in the guide for other information. Or, to search within the guide, use the search in the Oracle Help Center global header.
    - You can also use the **On this page** panel, if available, to jump directly to a specific section of the help that's currently open.

    Click the **Close** or **Open** icon to hide or show either panel at any time.

What to Do If You Don't See Help Icons

If you don't see any help icons on the page, click your user image or name in the global header and select **Show Help Icons**. You reveal any icons on your current page, and any other page you might use, but not all pages have help icons. In that case, click your user image or name in the global header and select **Applications Help** to open the Oracle Help Center.

Related Topics

- Find Guides, Readiness Material, and Other Resources
- What's a help desk?
- Troubleshoot Issues
- Oracle Help Center

Find Guides, Readiness Material, and Other Resources

The Oracle Help Center has guides, videos, readiness material, playbooks, and other resources for Oracle Fusion Cloud Applications.

Watch video

Browse for Content

1. From anywhere in the *Oracle Help Center*, open the main menu and click **Cloud Applications** > **Fusion Applications Suite**. Or, click **Fusion Applications Suite** on the Help Center home page.
2. On the Oracle Fusion Cloud Applications Suite page, click the name of your product.
3. Use the side navigation to find a specific resource, for example:
    - **All Books:** See all the guides for the product.
    - **Cloud Readiness / What's New:** Learn what's new or changed in a particular release update. Readiness material is published before the update happens, to help you prepare for it.
    - **APIs & Schema:** Get reference information about REST APIs, tables and views, and more.

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

Search for Content

The filter in the search bar controls the scope of your search. The filter you get depends on where you're at in the Help Center. For example, on a page for a specific product, you get search results only from that product. When you have a guide open, you search within that guide.

Tip: No matter where you're at, you can remove the filter in the search bar to search across the entire Help Center.

After you get your search results, you can apply more filters, for example to see only videos published within the past year. Search results might come from places other than the Help Center, for example *My Oracle Support* or oracle.com.

Review Readiness Material

Watch video

From anywhere in the Help Center, open the main menu and click **Cloud Applications** > **Cloud Applications Readiness**. On the Cloud Applications Readiness page, use the side navigation to access readiness material.

Examples of Release Readiness Resources

Entry in Side Navigation	Readiness Resource
Create or View Reports	A report that lists features for the specific pillars, products, modules, and release updates that you select. You get summary information about each feature, and you can also click a feature name or download a spreadsheet to get more details. You can also open and download predefined reports for all products, to see all the features from the past two years, all the Redwood features, or all the features with AI.
<Product Category>	What's New documents that provide details about the features in a specific product and release update. To see which features are delivered disabled or enabled by default, click **Feature Summary** in the table of contents.
Features with Opt-In Expiration	List of features where the current option to opt in won't be there in the future. See when each feature will no longer be optional.

14 Preferences

Set Your General Preferences

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

To set general preferences:

1. Click **Navigator** > **Tools** > **Set Preferences**.
2. From the **General Preferences** list, select the preference you want to set.
3. Update and save your preferences.

Set Language Preferences

Use the General Preferences: Language page of the Set Preferences work area to set your language preferences.

To set language preferences:

1. Click **Navigator** > **Tools** > **Set Preferences**.
2. From the **Default** list, select the language you want to set as the default language. Your entire application and all its elements, such as UI text, page names, and field names are displayed in this language. The input data for fields will not be translated automatically to the selected language.

   > **Note:** If the languages you want to set aren't available on the General Preferences: Language page, contact your help desk.

3. From the **Current Session** list, select the language to be used in the current session until you either log off or change your language preference.
4. From the **Display Name** list, select the language to be used for your display name in the global header. For example, if your name is Christy, and you select Spanish for your display name, then your name will be displayed as Christie. 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.

Related Topics

- Examples of Process Options

Set Regional Preferences

Use the General Preferences: Regional page of the Set Preferences work area to set your regional preferences. The default values you see for each field on this page are set by your implementers. You can edit these values if required.

To set regional preferences:

1. Click **Navigator** > **Tools** > **Set Preferences**.
2. Select your regional preferences:

- Territory
- Date Format
- Time Format
- Number Format
- Currency
- Time Zone

> **Note:** In the Time Zone list, if you see multiple options for a time zone, select the one that matches your daylight saving time. For example, suppose you see both Phoenix and Denver with the same time zone of UTC-07 and the difference is that Denver's time zone will change for daylight saving. If you're in Boulder with UTC-07, which changes with daylight saving, you should use the Denver time zone.

3. Click **Save and Close**.

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. Go to **Me > Quick Actions**, and then select **Change Photo** action.

   > **Note:** You can also update your photo using the My Photo page in general preferences. Click your user 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 20 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.

   > **Note:** If the photo appears rotated after upload, check the orientation of the camera when the photo is taken. If the camera is left-bottom aligned, then you might face this issue. Rotate the photo four times to correct the alignment.

3. Click **Save and Close**.

Set Up the Accessibility Modes

You can configure the accessibility modes of the application pages built with Oracle Application Development Framework (ADF).

> **Note:** You don't need to set up accessibility modes for pages built with Visual Builder Studio (Redwood pages) or Oracle Application Express (APEX pages), as both platforms include built-in accessibility support.

1. In Preferences, click **Accessibility Settings** in the General Preferences section.

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. If you run your operating system in a high contrast mode, such as black on white, switch the color contrast to **High**.
4. Save your changes.

Related Topics

- Accessibility Features
- Overview of Application Accessibility
- What themes can I use in Fusion Applications?

Change Your Password

Use the application link your company gave you to open the Sign In page and change your password for better security. You can use either of these methods to change your password.

- After you sign in, you can change your password using the **Set Preferences** option.
- On the Sign In page, you can change your password using the **Forgot Password** link.

Change Your Password Using Set Preferences

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**.

Change Your Password Using Forgot Password

1. On the Sign In page, click the **Forgot Password** link.
2. Enter the registered work email, select the Forgot Password option and click **Submit**.

   A notification containing a link to reset your password is sent to your work email.

Note:

- If you don't have your work email registered, the notification is sent to your line manager.
- If both you and your line manager don't have work emails registered, you'll not be able to reset your password. Contact your security administrator to register your work email.

This table shows which method you can use for resetting passwords based on your Single Sign-On (SSO) configuration.

SSO Configuration	Password Reset Method to Use	
	Set Preferences Option	Forgot Password Link
SSO Disabled	Yes	Yes

SSO Configuration	Password Reset Method to Use	
	Set Preferences Option	Forgot Password Link
SSO Enabled	No	No
SSO with Chooser Enabled (both SSO sign-in and local authentication options are available)	No	Yes

Set Up Multifactor Authentication Methods

You use your password preferences to set up your preferred methods for authentication. After a method is set up, you can use it as a second factor of authentication for signing in.

Note: If your organization enables passwordless authentication, there's no option to sign in using a password. Instead, here's how it works:

- Use your phone number or email as your username.
- Rather than using a password, you will authenticate using multifactor authentication (MFA). So, before your organization implements passwordless authentication, you must have at least one MFA method set up.

Enroll in MFA and Set Up Your First Authentication Method

1. Click your user image or name in the global header, and select **Set Preferences** from the **Settings and Actions** menu.
2. Open your password preferences and click **Manage Secure Verification**.
3. Enable secure verification using any of the available methods. You go through this guided setup process only when you're enrolling in MFA for the first time.

Method	Action Required
Mobile App	Use either of these modes. o Set up the Oracle Mobile Authenticator App to send a push notification for allowing or denying a sign in attempt. o Set up the Oracle Mobile Authenticator App to generate a passcode.
Email	Verify your email address using the one-time passcode that's mailed to you.
Phone Number	Verify using the one-time passcode that's sent to your phone number as a text message.
FIDO Authenticator	Set up and save a passkey from the available options.

Note: Your work mobile number and work email are used for the Phone Number and Email methods. The number and email come from Oracle Fusion Cloud Applications, not Oracle Cloud Infrastructure.

Set Up Additional Methods and Manage Them

Right after you enroll in MFA, you can set up additional secure verification methods on the **Security** tab that opens in Oracle Cloud Console. Any time after enrollment, you can click the **Manage Secure Verification** link in your password preferences to return to the **Security** tab and set up additional secure verification methods or manage them.

Bypass codes are available as an additional authentication option. You can generate a bypass code and save it for later use, but you can use it only once. A bypass code comes in handy for you to sign in when your authenticator is unavailable for any reason like lost service or no service. You can also contact your administrator to get a bypass code.

Related Topics

- Using the Oracle Mobile Authenticator App
- Using FIDO Authentication
- Generating a Bypass Code

Watchlist

Set Watchlist Preferences

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

The preferences contain these items:

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

Follow these steps to set your Watchlist preferences:

1. Click your user name or image in the global header, and go to **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

- Why are some items not displayed in my Watchlist?
- 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**.

Here are some other possibilities:

- 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

- Set Watchlist Preferences
- Create Watchlist Items

15 Accessibility

Overview of Application Accessibility

The application is 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 *Oracle's Accessibility Program*.

Related Topics

- Accessibility Features
- 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. Here are some accessibility features:

- 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.

Navigation Tips for Mobile Devices

After updating the fields on a page on mobile devices, to open additional action buttons such as **Save** or **Save and Close**, tap the **More Actions Ellipsis**.

Related Topics

- Set Up the Accessibility Modes

Keyboard Shortcuts

Overview of Keyboard Shortcuts

You can use keyboard shortcuts to navigate the entire application and do all user interface actions using only the keyboard.

You can access all relevant functionality without a mouse. You don't need assistive technology to use keyboard-only navigation, which is available to all users. For example, you can use keyboard shortcuts to save a file or open a tab. Keyboard shortcuts for specific UI elements vary depending on whether the page was built using Oracle Application Development Framework (ADF) or Oracle Visual Builder Studio (VB Studio) or Oracle Application Express Components (APEX).

To identify the type of page you're using, look at the browser URL of the page.

- If the third segment contains **faces**, the page is built using ADF.
- If the third segment contains **redwood**, the page is built using VB Studio.
- If the second segment contains **uix**, the page is built using APEX.

This table shows the keyboard shortcuts topic you can refer to, based on the type of page you're on.

URL Segment for Page Type	URL Example	Keyboard Shortcut Topic
faces (in the third segment)	**https://example.com/myApp/faces/Page1**	*Keyboard Shortcuts for Oracle Application Development Framework Components*
redwood (in the third segment)	**https://example.com/myApp/redwood/Page1**	*What are the common keyboard behaviors for Redwood applications?*
uix (in the second segment)	**https://example.com/uix/***	*Keyboard Shortcuts for Oracle Application Express Components*

Keyboard Shortcuts for Oracle Application Development Framework Components

Some application pages use Oracle Application Development Framework (ADF) components, which come with standard keyboard shortcuts. You might also 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

Related Topics

- Accessibility Features
- Overview of Application Accessibility
- Keyboard Shortcuts for Infolets
- What are the common keyboard behaviors for Redwood applications?

Keyboard Shortcuts for Redwood Components

Some application pages use Redwood components, which come with standard keyboard shortcuts. You might also find different keyboard shortcuts for complex UI actions and component-specific controls.

For information, see: *What are the common keyboard behaviors for Redwood applications?*

Related Topics

- Keyboard Shortcuts for Oracle Application Development Framework Components

Keyboard Shortcuts for Oracle Application Express Components

Some application pages use Oracle Application Express (APEX) components, which come with standard keyboard shortcuts. You might also find different keyboard shortcuts for component-specific controls.

For information, see *Keyboard Shortcuts for Oracle APEX*.

Keyboard Shortcuts for Home Page

You can use keyboard shortcuts to navigate on the home page or go to specific work areas.

This table lists the keyboard shortcuts for home page navigation.

Action	Shortcut
Open tabs, such as Me, My Team, and Tools	After you sign in and press the **Tab** key, the **Skip to main content** link appears. Press the **Enter** key to directly navigate to the first tab stop. You can then use the arrow keys (left and right) to navigate through the tabs.
Open the Navigator and the Settings and Actions menu	Press the **Tab** key to navigate to the next element.
Open specific work areas	When the focus is on a tab, such as Me and My Team, press the **Enter** key to display a set of work area icons and quick actions for a related set of tasks. Press the **Tab** key to navigate through the work area icons and quick actions. Press the **Enter** key to open a specific work area or quick action.
Move to the previous element on the page	Press the **Shift + Tab** key to navigate to the previous element.

Action	Shortcut

Related Topics

- Overview of Application Accessibility
- Set Up the Accessibility Modes
- Sign In and Get Started
- What are the common keyboard behaviors for Redwood applications?
- Keyboard Shortcuts for Oracle Application Development Framework Components

Keyboard Shortcuts for Work Areas

You can use keyboard shortcuts to go to specific work areas and do the required task on the work area pages.

This table lists the keyboard shortcuts for work areas.

Action	Shortcut
Open tabs, such as Me, My Team, and Tools	After you sign in and press the **Tab** key, the **Skip to main content** link appears. Press the **Enter** key to directly navigate to the first tab stop. You can then use the arrow keys (left and right) to navigate through the tabs.
Open specific work areas	When the focus is on a tab, such as Me and My Team, press the **Enter** key to display a set of work area icons and quick actions for a related set of tasks. Press the **Tab** key to navigate through the work area icons and quick actions. Press the **Enter** key to open a specific work area or quick action.
Submit your changes in work areas	After updating the fields on a page, press the **Tab** key until the focus is on the **Submit** button. You can do either of these steps: • Press the **Enter** key to click the **Submit** button. • On the **Submit** button (which is focused), the letter, m is underlined, which indicates that the keyboard shortcut to use that button is Alt+m. So, press Alt+m to submit your changes.
Save your changes in work areas	After updating the fields on a page, press the **Tab** key until the focus is on the **Save** button. You can do either of these steps: • Press the **Enter** key to click the **Save** button. • On the **Save** button (which is focused), the letter, S is underlined, which indicates that the keyboard shortcut to use that button is Alt+s. So, press Alt+s to save your changes.
Cancel your changes in work areas	After updating the fields on a page, if you want to discard your changes, press the **Tab** key until the focus is on the **Cancel** button. You can do either of these steps: • Press the **Enter** key to click the **Cancel** button. • On the **Cancel** button (which is focused), the letter, C is underlined, which indicates that the keyboard shortcut to use that button is Alt+c. So, press Alt+c to cancel your changes.

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.

Action	Shortcut
Move focus backward among the components in the page	Shift + Tab
Open a context menu where available within a template in the page	Alt + Arrow Down
Open the different components in a chart	Ctrl + Arrow
Select and deselect the checkbox in **My Infolets**	Spacebar
Open links except those in charts	Enter
Open links in the templates with charts	Arrow
Close dialog box	Esc

Related Topics

- Overview of Infolets
- Overview of Application Accessibility
- Set Up the Accessibility Modes
- Keyboard Shortcuts for Oracle Application Development Framework Components
- What are the common keyboard behaviors for Redwood applications?