Introducing

Oracle

E-Business Suite R12

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1 - Introduction

This e-book looks at the basic features of accessing and navigating within Oracle Applications Release 12 using the “SWAN” user interface. You learn to enter, retrieve, and search information in the form of a query, create and set Favorites and Preferences, access online Help, and run and monitor Reports and Programs.

Look-and-Feel of the “SWAN” User Interface

Overview: The new “SWAN” user interface (UI) greatly improves the look-and-feel of Oracle E-Business Suite, significantly enhancing usability and productivity. The “SWAN” UI brings together some of the best UI concepts from Oracle E-Business Suite, PeopleSoft, and JD Edwards applications.

Features: The “SWAN” user interface is a subclass of Browser Look and Feel (BLAF) and replaces the former look-and-feel. Oracle E-Business Suite will use only the “SWAN” look-and-feel for R12. This new look-and-feel applies to the whole Oracle E-Business Suite as follows.

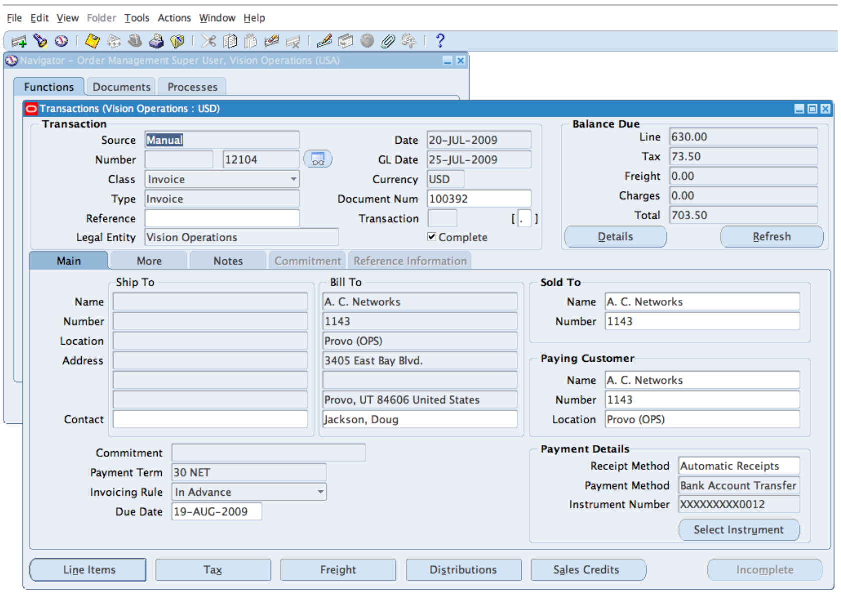
Oracle Application Framework (OAF) Applications

As the relevant changes are made in the underlying technology layer, most products will not require any direct changes to be made. The changes made at the technology layer for Oracle Application Framework (OAF) products can be summarized as follows:

- The overall color usage has been changed to a more contemporary and compelling color scheme, which reduces eye strain and provides a more pleasant look-and-feel.
- A new login screen complements the updates to the overall look-and-feel.
- The base font has been changed to Tahoma 9 pt. to make better use of available screen area.
- All buttons and tabs now have a gradient background, to increase their visibility on the screen as clickable elements.
- The button text and overall shape have been modified to reduce the amount of space required for their display.
- Buttons are now standard HTML buttons instead of images, which required a display server to be set up.
- Background colors of page elements have been modified for better visual separation of screen elements.
- The entire icon suite has been upgraded to a more sophisticated style that integrates visually with the overall interface design.
- The page footer background has been changed to make it more readily distinguishable from other page elements.
- The Navigator has been restyled to be consistent with the other UI changes.
- Page tabs have been moved to the left of the screen for better scanning and a clearer relationship with associated subtabs.

Forms Applications

The Forms color scheme has been changed to be consistent with the OAF products. Field values have been changed to normal weight, providing further consistency between products, and reducing the visual complexity of application screens.



As noted previously for OAF products, these changes have been made in the technology layer; no changes need to be made to individual products, to the position or layout of any field within Forms.

2 - Logging in to Oracle Applications

Starting Oracle Applications

The first step in starting Oracle Applications is to enter the appropriate URL for your site in an Oracle Applications certified browser. After starting Oracle Applications, the first window you see is the login window. You need an Oracle Applications username and password to log in to Oracle Applications. It is different from the username and password you use to log in to your computer. If you are not sure of your Oracle Applications username and password, consult your system administrator. Oracle Applications security is based on your Oracle Applications username. Your username connects you to your responsibilities, which control your access to applications, functions, reports, and data.

Navigating from Personal Home Page to Applications

After you log in to Oracle Applications, your E-Business Suite Home page is displayed. From here you can:

- Access E-Business Suite Applications (professional or self-service)
- View and respond to notifications
- Set personal user preferences
- Navigate to other frequently used functions or Web pages

Note: The exact appearance of your windows may vary depending on which interface you are using and how it is customized at your site.

Two Types of Interfaces

Oracle E-Business Suite applications are either Forms-based or HTML-based.

- Forms-based applications are optimized for processing a large volume of transactions.
- HTML-based applications, sometimes referred to as "Self-Service Applications," are optimized for ease of first-time use.

For example, to enter a batch of journals, E-Business Suite provides a Forms-based application. To submit an expense report, E-Business Suite provides an HTML-based application.

3 - Creating Favourites and Setting Preferences

The E-Business Suite Homepage is your entry point to Oracle E-Business Suite.

From this page, you can:

- Create Favorites
- Set Preferences
- Use Worklists
- Access E-Business Suite functions from the Navigator

Create Favorites

Customize your Favorites by adding links to frequently-used functions and Web sites. To add or remove links, select Edit Favorites.

Set Preferences

Select Preferences to set personal options. Options include language, territory, time zone, notification style, accessibility setting, and formats for dates and numbers. You can also reset your password from the Preferences page. Optionally, specify a Start page for all future sessions from available pages (organized by responsibility). Set additional preferences using user profile options.

Use Worklists

The Worklist displays your notifications.

Select the Subject to respond to or select Full List to see all your notifications.

Note: The Use Worklist option may not available by default on the Personal Home Page.

Access E-Business Suite Functions

Use the Navigator to access Oracle E-Business Suite functions grouped by responsibility.

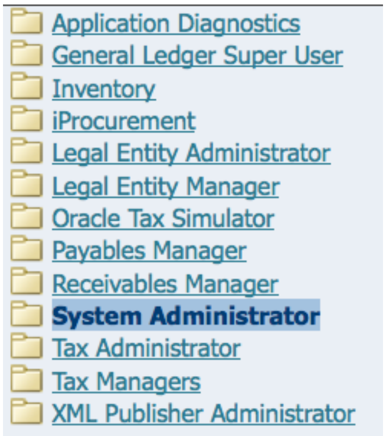
Note: A responsibility is a level of authority in Oracle E-Business Suite. It enables your access to those functions and data appropriate for your enterprise role. You can have one or more responsibilities.

To access a function:

- Select a responsibility to view its menu of functions
- Select the function to launch it

4 - Choosing a Responsibility

Each user has at least one responsibility and several users can share the same responsibility. Your system administrator can assign you any of the standard responsibilities or create custom responsibilities as per the business requirements.



Each responsibility would be associated with a single Application, such as HRMS, General Ledger, and so on. You can access either Professional Applications or Self-Service Applications, but not both, based on the responsibility you are associated with. Click the underlined link in the Application section to select your responsibility and then click the underlined link to open a specific function.

Note: The exact appearance of your window may vary depending on which interface you are using and how it is customized at your site.

Responsibility Relationships: Many to One

After you have used the login form to begin the login process, you must tell the system what type of access you will be using. A responsibility is a set of data, menus, and forms that defines your particular level of authority while using the system. For example, you would want the Accounts Payable department of your company to access the invoice forms of the system, but you would not want them to be able to access any payroll information. Another example is that the controller of a department would want to have access to all the data that his or her employees can use, so the controller would want access to both accounts payable and payroll information.

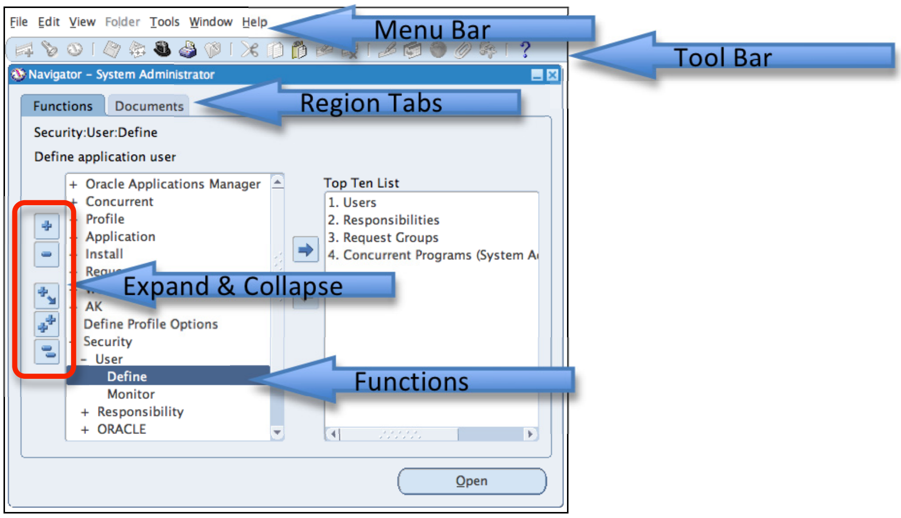
Responsibility Relationships

The following is a list of the types of responsibilities and their particular properties that can be defined in Oracle Applications by your system administrator:

- A specific application (or applications), such as Oracle General Ledger
- A Ledger, such as Vision Operations, used for financial reporting which is made up of the Chart of Accounts, Currency, Calendar, and Accounting Convention
- An organization, such as Vision Services or Vision Distribution

- A restricted list of windows to which you can navigate. For example, a responsibility may allow certain Oracle Financials users to enter invoices, but not to enter names of suppliers (vendors) or customers.
- A restricted list of functions you can perform. For example, two responsibilities may have access to the same window, but the window of one responsibility may have additional functional buttons.
- Reports in a specific application. Your system administrator can assign groups of reports to one or more responsibilities, so the responsibility you select determines the reports that you can submit.

5 - Navigator



The Navigator window displays the name of the responsibility you select in the title bar. Use this window to navigate to a form, so you can perform a specific business flow. You can navigate to the forms that are displayed in a navigation list on the left of the Navigator window. You can click the tabs to access the different regions.

Navigator Region Tabs

The Functions tab displays all of the applications functions that you can access for the responsibility that you selected. If you have a document, such as a particular purchase order, invoice, or sales order that you want to access later, you can create a link to the document using the Navigator's Document feature.

The Navigator's Document feature allows you to create as many links as you want and save them in the Documents region of the Navigator window. When you use a link to open a document, Oracle Applications opens the document in the appropriate form window. You can access the Document region using the tab control.

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

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

Expanding or Collapsing the Navigation List

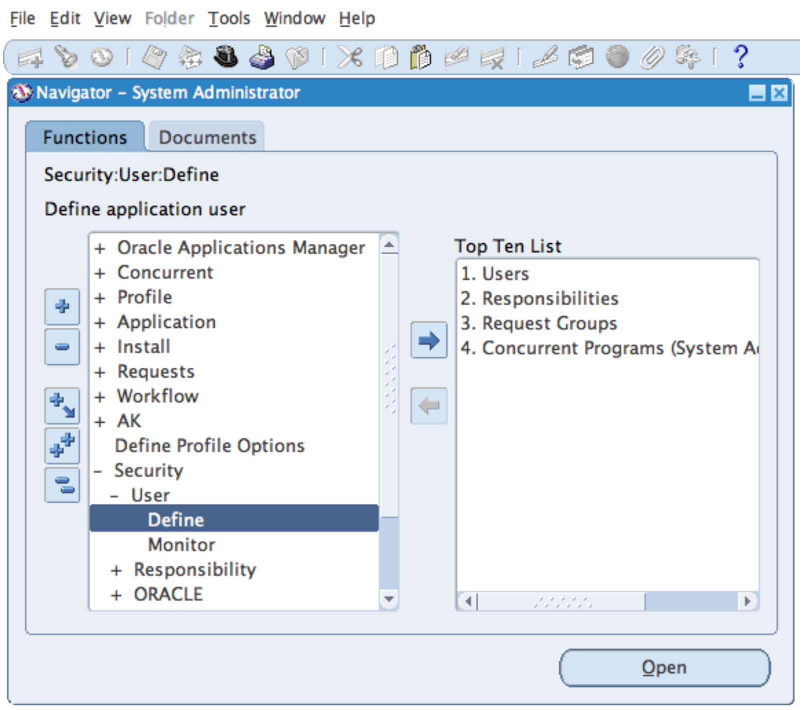
Each user can access the Oracle Applications forms in several ways so that they can use the system quickly, according to their own computer style. Use the various buttons on the Navigator to manipulate list items.

Expanding or Collapsing Several Items

Each user can access the Oracle Applications forms in several ways so that they can use the system quickly, according to their own computer style. Use the various buttons on the Navigator to manipulate list items.

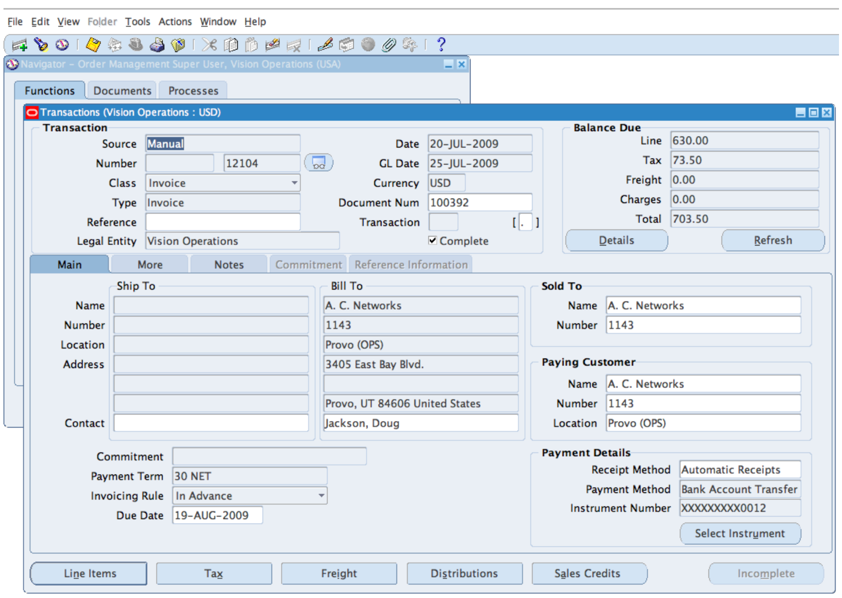
6 - Working within a Form

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



Form Terminology

Oracle Applications Release 12 works specifically in a Web-enabled environment. It is important to understand the terminology of the components within an Oracle Applications form.

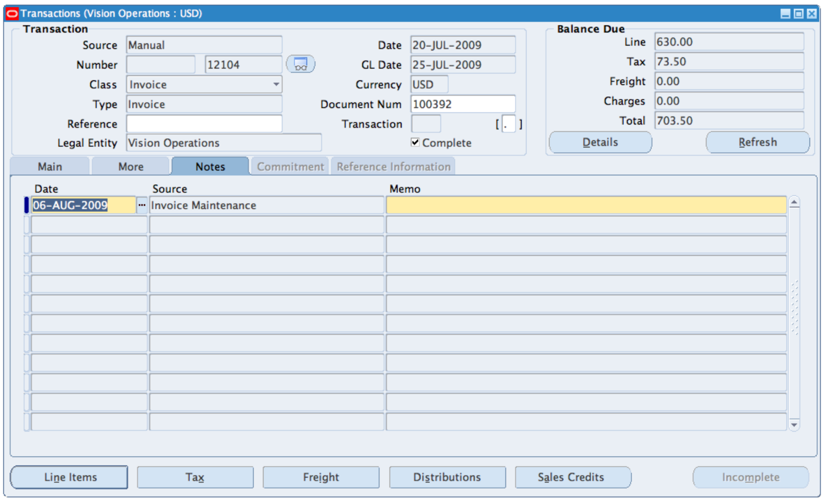


Common terms used in Oracle Applications forms are listed below:

- **Menu Bar:** Use pull-down menus from this menu bar to navigate or perform actions within a form.
- **Window:** It is an area where the user interacts with an application. (Many windows can be open at one time and you can access these "overlapping" windows to perform data entry or data search activities.)
- **Window title:** It is the text in the title bar that indicates the name of the window and usually gives context information pertinent to the information in that window.
- **MDI window:** It is a master container window that houses all windows, toolbars, and application windows.
- **Tool tip:** It is an iconic bubble help that you can use to determine the function of a button on the toolbar.
- **Record or row:** It is a set of one or more related data items from a table or view that are grouped for processing.
- **Check box:** It is a box in which you can toggle between an "on/off" or "yes/no" state for a particular value.
- **LOV icon:** It is an icon that you can click to display a list of values (LOV) for the current field.
- **Pop-up list:** A pop-up list lets you select a single value from a short list.
- **Scrolling region:** It is a region containing a scroll bar, in which to view other fields.
- **Block:** It is an area of information relative to a specific business function or entity.
- **Region:** It is a logical grouping of fields set apart from other fields by an outline.
- **Region tab:** It is a collection of regions that occupy the same space in a window, where only one region can be displayed at a time.
- **Field:** It is an area in a window that displays data or enables you to enter data.
- **Button:** It is a graphic element that initiates a predefined action when you click it.

Field Colors

Each block contains fields you use to enter, view, update, or delete information. A field prompt describes each field by telling you what kind of information appears in the field or what kind of information you should enter in the field.



Fields are color coded to indicate their type as follows:

- **White fields:** Allow data entry
- **White fields with black text:** Indicate drilldown capability
- **Yellow fields:** Require data entry
- **White fields with green text:** Are display-only
- **Blue fields:** Indicate fields to use in "Query-Enter" mode

The term "field" generally refers to a text field, an area in a window that either displays data or allows you to enter data. However, a field can also include a button, a check box, an option group, or a pop-up list.

Creating and Saving a New Record

To Create a Record - Choose New from the File menu or use the New toolbar icon. After entering data for your new record, select Save or Save and Proceed from the File menu to save the record to the database. Choosing Save and Proceed automatically advances you to the next record.

Editing and Deleting a Record

To Edit a Record - Choose Record from the Edit menu. This action allows any change to be made to the selected record from your editable screen.

Note: Fields protected against any updated cannot be edited.

To Delete a Record - Choose Delete from the Edit menu. This action erases the current record from your screen and returns your cursor to the first field of the next record.

To Save Your Deletion from the Database

Choose Save or Save and Proceed from the File menu.

Note: All records cannot be deleted in this manner. Those records which cannot be deleted need to be end dated and such end-dated records cannot be used further.

Using a List of Values (LOV)

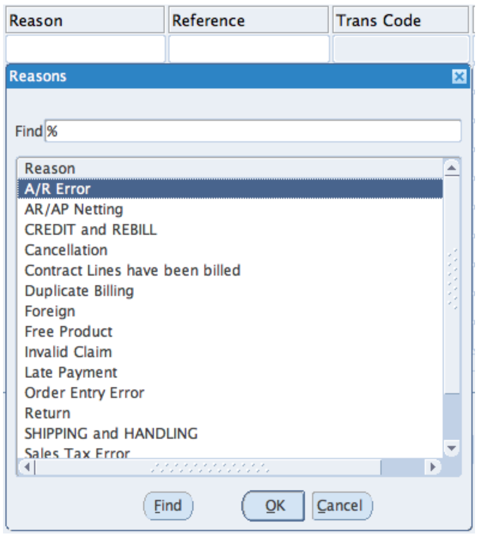
A field that has a predefined list of valid values displays an LOV icon. Select this icon to view the valid field values. If a list contains more than 100 values, you are prompted to enter a Find string to limit the list.

Note: Lists that require a Find string do not use the autoreduce feature.

To Select a Value from a List

Select a value or reduce the list using one of the following methods:

Without placing your cursor over the Find field, enter the initial characters of a value to autoreduce the list to those items matching the characters entered. Press [Backspace] to reexpand the list.



If your entry reduces the list to a single value, the list window closes and inserts the value into the field. In the list window, enter any group of characters in the Find field and select the Find button.

Note: Use the wildcard character (%) to represent any number of characters and the underscore (_) to represent a single character. Do not enter a wildcard character by itself. This will match all records.

LOV: Shortcuts

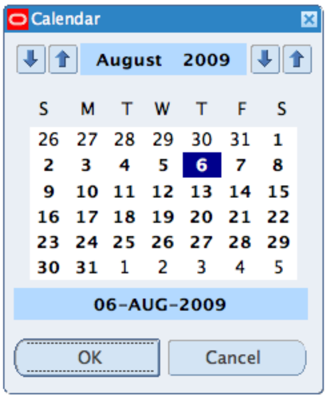
To select a value from a list for a field, click the LOV icon in the field to display a list. Select the value directly from the list by using some of the methods described below:

- Without clicking in the Find field, type the first character(s) of a value to reduce the list to only those values that match the characters you enter. This is also known as AutoSelection.
- Search for a value by clicking in the Find field, then enter your search criteria in the Find field, and click the Find button.
- Select a value directly from the list by using the mouse to scroll through the list and then double-click the value to choose it, or click the value once and then click OK to select it.
- After you select a value, the list window closes and inserts the value into the current field. To close a list window without choosing a value, select Cancel.

To Use Power List

Power List enables you to enter a search string or partial value in an LOV field without opening the list window. Enter the initial characters of a value in the field and press [Tab]. Power List completes the entry for you. Your entry can include wildcard characters. If more than one value matches the characters you specify, a list window appears containing those values.

Using Calendar



Values in a date field can be entered directly or you can use a calendar to enter a valid value in a date field if the field displays the List icon. If your date field supports time, you can also use the Calendar window to select a valid time with the date.

1. Place your cursor in a date field.
2. Click the list of values associated with a date field to display the Calendar window. The date value that appears below the calendar is called the selected date, which is either the value already in the field, the default value of the field, or the current system date.
3. Click a date.

Note: Disabled buttons that show dimmed text represent invalid days, which cannot be selected. Similarly, if a date field is display-only, you can display the Calendar window for the field, but you cannot change the date shown on the calendar.

4. Click OK to accept the selected date and close the window.
5. Click Cancel, if you want to close the window without selecting a date.

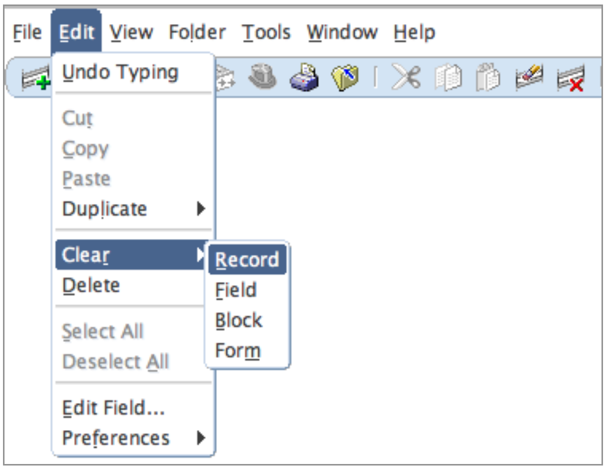
Clearing Data

You can clear data from the screen at almost any time. Typically, you will use this feature when you start to enter data in a field and then change your mind. Oracle Applications will think you are in the middle of processing a record and will not allow you to proceed with the next task until you clear the field.

The data you clear is simply erased from the screen and not deleted from the database.

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

(M) Edit > Clear and then select the appropriate option, to clear a field, record, block, or form.



You can also clear some or all data from a field by highlighting the data and selecting (M) Edit > Cut.

Copying Data from a Record

To save time during data entry, you can duplicate data from a previous record if much of the data needs to be repeated again in the new record. You can use Cut, Copy, and Paste from the Edit menu or you can use the following techniques:

Copying a Field Value from the Previous Record

1. Enter a new record or query an existing record in your form.
2. (M) File > New or click the New icon to insert a new record after the existing record.
3. Place your cursor in the field whose value you want to duplicate.
4. (M) Edit > Duplicate Field Above, to copy the field value from the previous record into the current record.

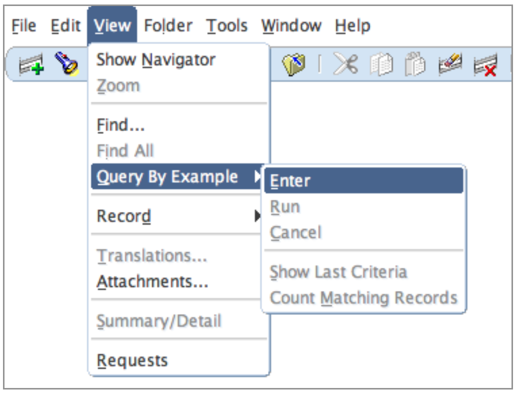
Copying All Field Values from the Previous Record

1. Follow steps 1 and 2 mentioned above.
2. (M) Edit > Duplicate Record Above, to copy all field values from the previous record into the current record.

Note: Depending on the record storage in the database and relevant database tables, not all fields may be copied when using this feature.

7 - Searching for Information

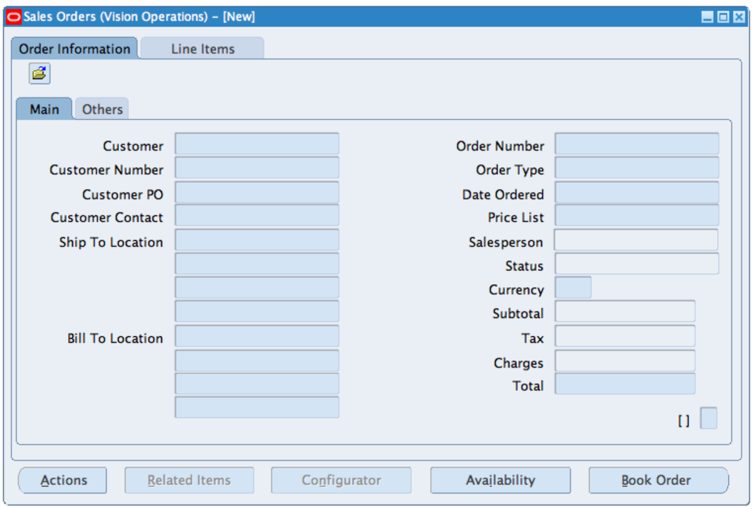
In Oracle Applications, you can quickly retrieve and review all available information in your database without having to remember the information displayed in the windows, or without having to print lengthy reports to see the data. Instead, you can simply run a search to obtain the information you want, and then review the data online in the same window you used to enter the data.



By using the query function in Oracle Applications, you can satisfy the following information the search needs:

- Gain instant, online access to all your application information. You can find information quickly and easily, without having to use complex query language.
- Search for a specific record or for a group of records based on the criteria you enter. You can retrieve this information directly, without having to review all the information in your application database.
- Search for information using criteria of different types or lengths, including a single letter, a single word, or a group of characters, or anything else you want to enter.
- Find out how much information is available that matches your search criteria before a search for a single piece of information yields 10,000 responses.

Query Versus Find



Query Mode

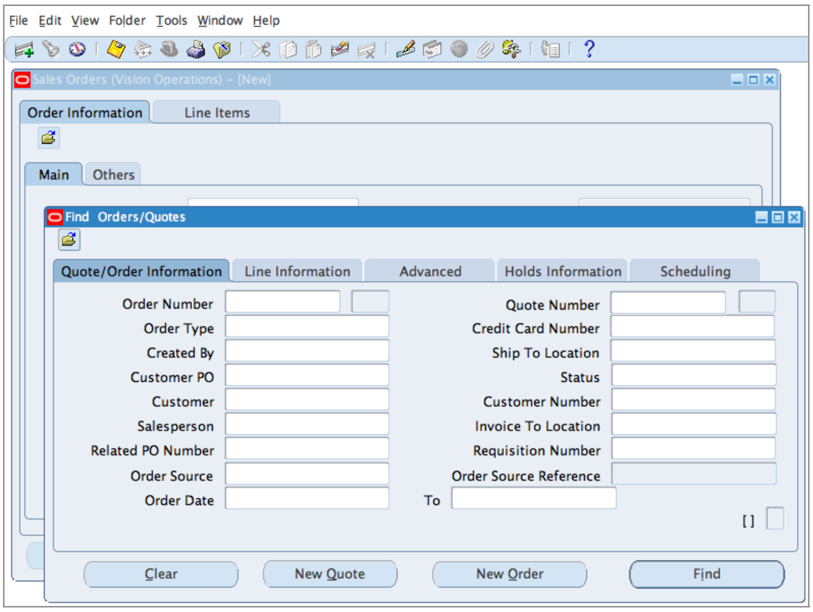
- In Query mode, you can use the menu bar to access a query, or you can use keyboard shortcuts [F11] to enter a query and press and hold [Ctrl] + [F11] to execute a query.
- You use the existing window to prepare your search criteria for the query. You can enter specific information in any field to narrow your search.
- When using wildcards to prepare your search criteria, you can use all query operators to narrow your search.
- In query mode, you can check to see how many records match your criteria even before retrieving the data that matches your query.

Find Mode

- In Find mode, you use the menu bar to access the Find window, or you click the icon on the toolbar.
- You use a new window, the Find window, to prepare your search criteria.
- The list of values is available in many fields in Find mode.
- The Query Count feature is not available in Find mode.

Using Find Mode

To search for records in your current block or window, use the Find window. The Find window contains fields for entering search criteria. These fields are specific to the current block and often validate the search criteria you enter against a list of valid values.



Generally, a Find window is displayed for those blocks that have many records or for those blocks that can be best searched using criteria in more than one field.

How to Use Find Mode

(M) View > Find or click the Find icon on the toolbar.

- Enter your search criteria in the appropriate fields of the Find window.

- If a field does not provide a list of values for you to choose from, you can enter wildcard characters (% and -) in the search phrase. You cannot, however, use query operators (such as >, <, and so on) in a Find window.
- Click the Find button to find any matching records.
- Click the Clear button to clear the current search criteria from the Find window, so you can enter new search criteria.
- Click the New button to enter a new record in your current block if your search finds no matching records. Not all windows support the Find.

Using Query Mode

How to Use Query Mode

1. (M) View > Query By Example > Enter.
2. Enter the search criteria in any of the fields (indicated by blue) that can be queried, using wildcard characters and query operators as necessary. You can also select View > Query By Example > Show Last Criteria to display the search criteria used in your last search, if you performed one.
3. (M) View > Query By Example > Run to perform the search.
4. (M) View > Query By Example > Cancel to cancel from Enter Query mode.

How to Obtain a Query Count

1. Perform steps 1 and 2 above.
2. (M) View > Query By Example > Count Matching Records to display the number of records a Query By Example search would retrieve.

Using Query Operators and Wildcard Characters

You can use any of the query operators listed in the table below.

Operator	Meaning	Example
=	Equal to	='Oracle' = 573
!=	Not Equal to	!='Oracle' != 573
>	Greater than	> 100
<	Less than	<100
>=	Greater than or Equal to	>=100
<=	Less than or Equal to	<=100
#BETWEEN	Between two values	#BETWEEN 0 and 10

You can also use the percentage (%) wildcard character to represent any character or group of characters. For example, use "Sys%" to represent System, Systematic, and so on.

You can also use the underscore (_) character to represent any single character. For example, "User_" can represent User1 or UserY.

8 - Accessing Online Help

Using Window Help

To get help:

- Select Window Help from the Help menu, click the Help button on the toolbar, or press [Ctrl] + [H] to display help for the current window
- Navigate to the Contents tab to display online Help for any of the Oracle Applications products

Note: You can also choose *Oracle Applications Library* from the Help menu.

Click a product name to display the list of top-level topics in that product's online documentation. Click a topic of interest.

Navigate to the Search tab to find specific Oracle Applications information. Enter your search criteria in the text field and then click the Go button. For more search options, click the Advanced Search link.

Searching for Help

You can perform a search to find the Oracle Applications help information you want:

- Choose Window Help from the Help menu or click the Help button on the toolbar.
- Navigate to the Search tab, enter your search criteria in the text field, then click the Go button to perform a simple search. For more search options, click the Advanced Search link.

A list of titles, ranked by relevance and linked to the documents, is returned from your search. Click whichever title seems to best answer your needs to display the complete document.

Tip: If the selected document does not fully answer your questions, click the browser's Back button to return to the list of titles and try another one.

About Oracle Applications

You can obtain details about the version of Oracle Applications you are using, your login information, and details regarding the current form you are using with the About Oracle Applications window. This information is useful if you have an error message and need assistance from your system administrator or Oracle support representative when you report a problem.

How to Display Version Information for Oracle Applications

(M) Help > About Oracle Applications.

Click OK to close this window when done.

9 - Error Messages

Generally, messages and errors are preceded by a message or error code:

- Codes that are prefixed by FRM arise from Oracle Forms, the underlying product that provides Oracle Applications with its graphical user interface.
- Codes that contain the prefix ORA arise from the Oracle database.
- Codes that are prefixed by APP arise from Oracle Applications.

These codes help your system administrator or Oracle support representative diagnose the errors that you may encounter.

Record History

You can always display information about a record that has been previously saved:

- Who created the record
- Date of creation
- Database table or view where the record resides
- Who last changed the record using Oracle Applications
- Date of the last change
- User's login

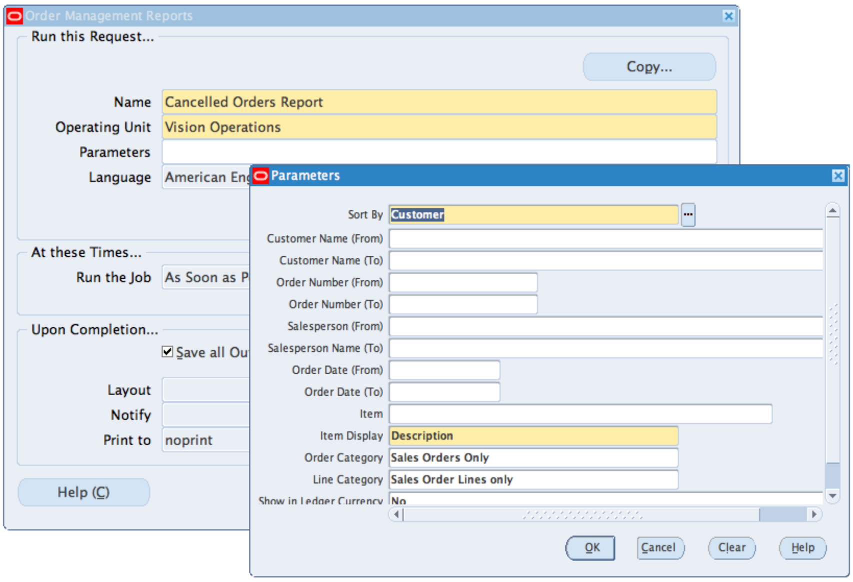
How to Learn About the Current Record

(M) Help > Record History. A dialog box appears that shows you information about the current record. Click OK to close the window.

10 - Running Reports and Programs

Using Concurrent Processing

You can run a noninteractive, data-dependent function such as a report or program, simultaneously with online operations. With concurrent processing, you can complete noninteractive tasks without interfering with the interactive work that you perform at your terminal.



An example of concurrent processing occurs when you use the Post Journals window in your Oracle General Ledger application. After you specify the journal batches to post and click Post, your Oracle General Ledger application uses concurrent processing to post the journal batch entries without further involvement from you. Meanwhile, your terminal is still available for you to continue doing other work in Oracle Applications.

Oracle Applications runs all of its reports and programs as concurrent processes whether you submit them using the Submit Requests window, or using a product-specific submission window. Your system administrator can customize concurrent processing to optimize the performance of Oracle Applications.

Running Reports and Programs

Concurrent processing helps you satisfy the following business needs:

- Continue working at your computer while running data-dependent reports and programs.
- Fully use the capacity of your hardware by executing many application tasks at once.

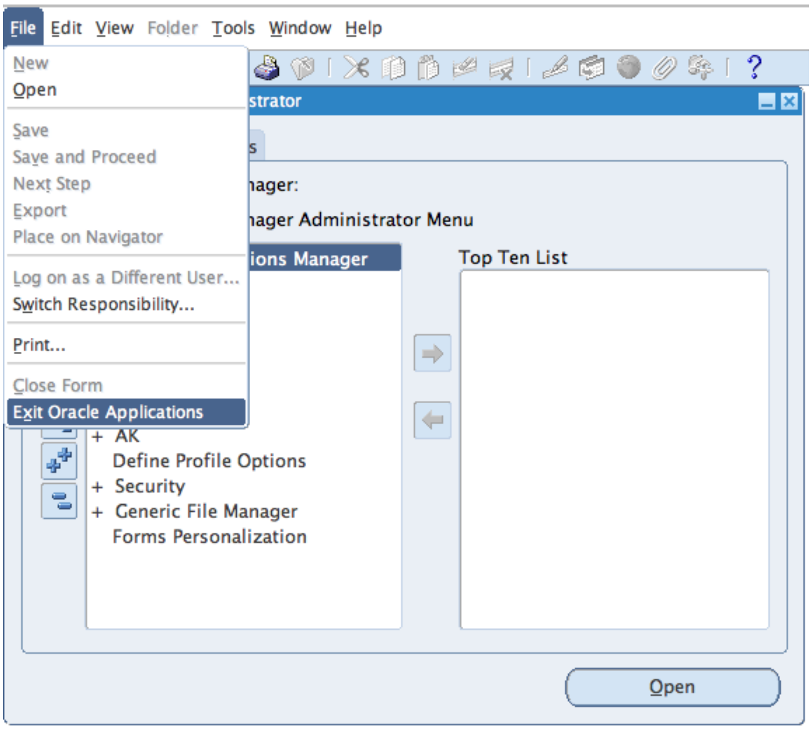
Standard Request Submission lets you satisfy a related set of business needs.

```
Vision Operations (USA)                                                           Report Date: 06-AUG-2009 21:32
                                                  Cancelled Orders Report

                                                     Report Parameters

                                                   Sort By:  Customer
                                            Customers From:
                                                        To:
                                        Order Numbers From:
                                                        To:
                                          Salepersons From:
                                                        To:
                                          Order Dates From:
                                                        To:
                                            Order Category:  Sales Orders Only
                                             Line Category:  Sales Order Lines only
                                                      Item:
                                              Item Display:  Description
                                           Mixed Precision:  2
                                     Show in Ledger Currency:  No


Vision Operations (USA)                          Cancelled Orders Report                 Report Date: 06-AUG-2009 21:32
                                                                                                Page:      1  of    28

       Sort By: Customer                                        Item Display: Description


     Customer Name: 001Giant Distributors.                      Customer Number: 5732
      Order Number: 64270                                           Salesperson: No Sales Credit
        Order Date: 30-JUL-09                                          Currency: USD

                                                      Item           ----------  Cancel ------------
        Line                                          --------------------------Unit:-------              Amount     Category
        -------------                                                ----------  ----      ------------------ ------------
        2.1            Dell Experion Laptop                                   1  Ea                    0.00        ORDER
```

You can:

- Use a standard interface to run your programs and reports
- Control access to different reports and programs
- View report output online
- Automatically run programs, reports, or request sets at specific time intervals
- View a log file that summarizes the completion information about all the reports and programs in a request set

11 - Logging Out of Oracle Applications



From the file menu select Exit Oracle Applications. It is important to exit the system in this manner to ensure that your username is cleared from system access.

You can also close the multiple-document interface (MDI) window or use the [F4] function key. Log out of Personal Home Page completely by clicking the Logout link.

12 - More Information

You can receive more information on training Oracle ebusiness Suite from

http://www.i-oracle.com

Yemi Onigbode - 2009