

# **R12.x Oracle E-Business Suite Essentials for Implementers**

**Activity Guide**

D58324GC10

Edition 1.0

March 2010

D66002

**ORACLE®**

**Copyright © 2010, Oracle and/or its affiliates. All rights reserved.**

#### **Disclaimer**

This document contains proprietary information and is protected by copyright and other intellectual property laws. You may copy and print this document solely for your own use in an Oracle training course. The document may not be modified or altered in any way. Except where your use constitutes "fair use" under copyright law, you may not use, share, download, upload, copy, print, display, perform, reproduce, publish, license, post, transmit, or distribute this document in whole or in part without the express authorization of Oracle.

The information contained in this document is subject to change without notice. If you find any problems in the document, please report them in writing to: Oracle University, 500 Oracle Parkway, Redwood Shores, California 94065 USA. This document is not warranted to be error-free.

#### **Restricted Rights Notice**

If this documentation is delivered to the United States Government or anyone using the documentation on behalf of the United States Government, the following notice is applicable:

#### **U.S. GOVERNMENT RIGHTS**

The U.S. Government's rights to use, modify, reproduce, release, perform, display, or disclose these training materials are restricted by the terms of the applicable Oracle license agreement and/or the applicable U.S. Government contract.

#### **Trademark Notice**

Oracle is a registered trademark of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

#### **Author**

Rashmi Gopal Rao, Reema Saravanan

#### **Technical Contributors and Reviewers**

Donna Johnson, James Devine, Itzik Pripstein, Leta Davis, David Barnacle, Deepak Seth

**This book was published using: Oracle Tutor**

## Table of Contents

---

<b>R12.x Oracle E-Business Suite Essentials for Implementers.....</b>	<b>1-1</b>
R12.x Oracle E-Business Essentials for Implementers .....	1-3
Guided Demonstration - Logging In to and Navigating the Oracle Applications (Professional and Self-Service Interface)(Required).....	1-4
Guided Demonstration - Creating Favorites (Required) .....	1-6
Practice - Logging In to Oracle Applications, Navigating through Responsibilities and Menus, Closing a Form (Required).....	1-7
Solution - Logging In to Oracle Applications, Navigating through Responsibilities and Menus, Closing a Form (Required).....	1-8
Practice - Switch Responsibility (Required).....	1-13
Solution – Switch Responsibility (Required).....	1-14
Guided Demonstration - Creating and Saving a Record (Required) .....	1-17
Guided Demonstration - Retrieving and Deleting a Record (Required).....	1-18
Practice - Creating, Saving, Searching, Editing, and Deleting a Record (Required) .....	1-19
Solution - Creating, Saving, Searching, Editing, and Deleting a Record (Required) .....	1-21
Practice - Reviewing the Help Menu Item .....	1-26
Solution: Reviewing the Help Menu Item .....	1-27
Guided Demonstration - Running a Single Request Report (Required) .....	1-30
Practice - Running Reports and Programs.....	1-31
Solution: Running Reports and Programs .....	1-32
Guided Demonstration - Running a Business Intelligence (BI) Publisher Report (Required) .....	1-40
Practice - Creating a New User (Required).....	1-41
Solution: Creating a New User (Required) .....	1-43
Guided Demonstration - Setting Profile Options (Optional).....	1-46
Guided Demonstration - Entering an Item, Discussing Key and Descriptive Flexfields (Required) .....	1-48
Guided Demonstration - Entering an Asset, Discussing Context Sensitivity (Required) .....	1-50
Practice - Creating Value Sets (Required) .....	1-52
Solution: Creating Value Sets (Required).....	1-54
Practice - Creating a Structure for a Key Flexfield and Adding Value Sets (Required) .....	1-57
Solution: Creating a Structure for a Key Flexfield (Required).....	1-59
Practice - Testing the Flexfield (Required) .....	1-67
Solution: Testing the Flexfield (Required) .....	1-68
Practice - Defining a Descriptive Flexfield with Context-Sensitive Segment (Required) .....	1-71
Solution: Defining a DFF with a Context-Sensitive Segment.....	1-76
Practice - Defining / Creating an Item (Required).....	1-88
Solution: Defining / Creating an Item (Required).....	1-89
Guided Demonstration - Creating a Supplier in Payables and Accessing from Purchasing (Required) .....	1-94
Practice - Creating a Customer in Receivables and Accessing it from Order Management and Inventory (Required) .....	1-97
Solution: Creating a Customer in Receivables and Accessing from Order Management and Inventory (Required) .....	1-99
Practice - Creating a New Employee and Associating it to a User (Required) .....	1-103
Solution: Creating a New Employee and Associating it to a User (Required) .....	1-105
Practice - Understanding How Multi-Org Secures Application Data (Required) .....	1-108
Solution: Understanding How Multi-Org Secures Application Data (Required) .....	1-110
Guided Demonstration - Multi-Org Access Control (MOAC) Setup, Defining Security Profile, Running System List Maintenance (Optional) .....	1-115
Practice - Covering Tasks for Multiple Operating Units Without Changing Responsibilities (Optional) .....	1-118

Solution: Covering Tasks for Multiple Operating Units Without Changing Responsibilities (Optional) .....	1-121
Guided Demonstration - Using the Workflow Monitor (Required).....	1-126
Practice - Viewing Approval Process Using Workflow Monitor (Required) .....	1-128
Solution: Viewing Approval Process Using Workflow Monitor (Required) .....	1-130
Guided Demonstration - Activating an Event Alert (Optional).....	1-140
Practice - Creating and Testing a Periodic Alert (Optional).....	1-142
Solution: Creating and Testing a Periodic Alert (Optional) .....	1-145

# **R12.x Oracle E-Business Suite Essentials for Implementers**

**Chapter 1**



# **R12.x Oracle E-Business Essentials for Implementers**

## **Activity Guide**

**ORACLE®**

## **Guided Demonstration - Logging In to and Navigating the Oracle Applications (Professional and Self-Service Interface)(Required)**

---

### **Logging In to Oracle Applications**

Login to the Oracle Applications as Operations.

**Note:**

Accessibility: There are three types of accesses that can be selected before logging in to Oracle Applications.

- 1) Standard Accessibility: Renders the pages accessible for users using assistive technology.
- 2) Screen Reader Optimized: Optimizes the pages for screen readers. This may degrade the output for sighted users.
- 3) None: The pages may include behaviors that are not accessible.

Select anyone of the above depending on the requirements. Usually “None” is chosen as all the contents can be accessed.

### **Setting Preferences**

1. Click the Preferences link on the Personal Home Page (PHP).
  2. In the Territory field, select a country other than the country that is shown, such as United Kingdom or the country where the class is being taught, from the list of values (LOV).
  3. In the Currency field, select the currency of the country that is selected above. For e.g., if United Kingdom is selected, select Pound Sterling.
  4. Select any one Number format from the LOV.
- Note:** Inform students that the preferences can be set as required by the organization. But in the class all the students cannot change preferences as everyone is accessing the same instance.
- Additionally, if the default preferences are to be restored, one can do so by clicking the Reset to Default button.
5. (B) Cancel

### **Navigating Between Responsibilities and Opening a Form**

6. On the Personal Home Page, discuss what a responsibility is and the different responsibilities available to this user.
7. Show how to go to a menu under a responsibility by clicking on a responsibility, such as Application Developer and show the different menus such as Profile, Flexfield Test, Segments, Sets, Values, etc.
8. Select Order Management Super User, Vision Operations (USA) on the Personal Home Page.
9. Click the Sales Orders link under Orders, Returns to open a form.
10. In the form-based interface, demonstrate the following options:
  - Fields wherein the data can be entered (Optional and Mandatory)
  - List of values (LOV) icon in the form and how to find and enter a value
  - The toolbar with different icons like Save, Switch Responsibility, Find, Clear Record, Delete and so on.

- The different Menu options and the submenus under each menu. File Menu consisting of submenus like Save, Close Form, Switch Responsibility, Exit Oracle Applications, and so on.
  - The Tab regions, which display different fields at the Header level and the Line level.
  - Close the form to return to the Navigator.
  - Show the usage of the Expand, Collapse, Expand All, Collapse All, and Expand Branch buttons.
  - Show how to add and delete values to the Top 10 List from the Navigator Menu.
11. Return to the PHP to demonstrate iExpenses.
    - (B) Create Expense Report
    - Discuss mandatory fields, entry fields, List of Values, etc.
  12. Cancel Expense Entry and return to the PHP.

## Guided Demonstration - Creating Favorites (Required)

---

1. Log in to the Oracle Applications as Operations.
2. (B) Personalize in the Favorites section
3. Enter a function in the Customize Favorites screen:
  - Responsibility: Inventory, Vision Operations (USA) (select from drop-down list)
  - Click (B) Go
  - Check the 'Receipts' checkbox in the Select Function Prompt Section
  - (B) Add
  - (B) Apply
  - Confirm the addition of Receipts in the Favorite section of the Home page
4. Enter a URL:
  - (B) Add URL
  - Enter any website name such as 'Oracle' in the Favorite field
  - Enter the URL such as [www.oracle.com](http://www.oracle.com) in the URL field
  - Check the 'Open in New Window' checkbox.
  - (B) Apply
  - Confirm the addition of Oracle in the Favorite section of the Home page. Click the newly created link to verify a new window opens to the correct URL.

## **Practice - Logging In to Oracle Applications, Navigating through Responsibilities and Menus, Closing a Form (Required)**

---

### **Overview**

In this practice, you log in to Oracle Applications, navigate through the responsibilities and menus

### **Assumptions**

Replace XX with your initials or a terminal number as given by your instructor.

### **Tasks**

#### **Logging In to Oracle Applications**

1. Open the URL given by the Instructor in Internet Explorer or Netscape.
2. Use the following information to log in:

Field	Value
Username	OPERATIONS
Password	welcome
Accessibility	None

- (B) Login

#### **Navigating through responsibilities and menus:**

3. On the Personal Home Page (PHP), click the iProcurement responsibility to open the iProcurement Home page.
4. Navigate to the Notifications Web page
  - (T) Requisitions > Notifications.
  - View All Notifications.
5. Return to the Home page.
6. On the Personal Home Page, click the Assets, Vision Operations (USA) responsibility to find the different menus available such as Financial Information, Transaction History, and Accounting Events under this responsibility.
  - Click the Financial Information link under Inquiry to open the Asset Inquiry form.
  - Review the different fields such as Asset Number, Description, Tag Number, Category etc. in this form.

#### **Closing a Form**

7. Close the Asset Inquiry Form.

## Solution - Logging In to Oracle Applications, Navigating through Responsibilities and Menus, Closing a Form (Required)

### Logging In

1. Open the URL given by the Instructor in Internet Explorer or Netscape.
2. Use the following information to log in:

Value	Description
Username	OPERATIONS
Password	welcome
Accessibility	None

- (B) Login

The screenshot shows the Oracle Application Login screen. At the top, there's a banner with four small images of people. Below the banner, on the left, is a large globe graphic. The main area contains a form with the following fields:

- \*User Name: OPERATIONS  
(example: michael.james.smith)
- \*Password: \*\*\*\*\*  
(example: 4u99v23)
- Login
- Cancel
- Accessibility: None
- Select a Language:  
English

At the bottom of the page, there are links for "About this Page" and "Privacy Statement", and a copyright notice: "Copyright (c) 2006, Oracle. All rights reserved."

### Navigating through Responsibilities and Menus

3. On the Personal Home Page (PHP), click the iProcurement responsibility to open the iProcurement Home Page.

The screenshot shows the ORACLE iProcurement interface. At the top, there's a navigation bar with links like Shop, Requisitions, Receiving, Contractors, Stores, Shopping Lists, Non-Catalog Request, Contractor Request, Shopping Cart, Home, Logout, Preferences, Help, and Diagnostics. Below the navigation is a search bar for 'Main Store' with a dropdown arrow, a 'Go' button, and a link to 'Advanced Search'. A 'Stores' section lists various options like Main Store, Exchange Marketplace, Legal Services, IT Equipment, Facilities Equipment, etc. To the right is a 'Shopping Cart' panel showing one item: 'Sentinel Stand... 10 Each'. Below that is a 'Purchasing News' section with links to check frequently asked questions and review purchasing policies. The main content area is titled 'My Requisitions' and shows a table with columns: Requisition, Description, Total (USD), Status, Copy, Change, and Express Receive. The table contains several rows of requisitions. Below this is a 'My Notifications' section with a table showing notifications categorized by Type (e.g., Expenses Export, PO Approval, PA Workplan Workflow) and Subject.

4. Navigate to the Notification Web page: (T) Requisitions > Notifications

The screenshot shows the ORACLE iProcurement Notifications page. The navigation bar includes Requisitions, Notifications (which is highlighted in blue), and Approvals. Below the navigation is a search bar for 'Open Notifications' with a dropdown arrow, a 'Go' button, and a 'Select Notifications' section with 'Open', 'Reassign', and 'Close' buttons. There are also 'Previous' and 'Next 25' links. The main content is a table titled 'Select Notifications' with columns: Select From, Type, Subject, Sent, and Due. The table lists various notifications such as Expenses Export Rejections, PO Approvals, and PA Workplan Workflow notifications, each with a timestamp indicating when they were sent.

5. Select All Notifications from the LOV under View

6. (B) Go

The screenshot shows the ORACLE iProcurement interface. At the top, there's a navigation bar with links for Shop, Requisitions, Receiving, Contractors, Requisitions, Notifications, and Approvals. Below this is a sub-navigation bar for Requisitions: Notifications >. A search bar with dropdown options like 'View All Notifications' and a 'Go' button is present. Below the search is a 'Select Notifications' section with 'Open', 'Reassign', and 'Close' buttons. A link to 'Select All' or 'Select None' is available. The main area displays a table of notifications:

Select From	Type	Subject	Sent	Due	Status
<input type="checkbox"/> Brown, Casey	PO Approval	<a href="#">Standard Purchase Order 6109 has been approved</a>	19-Dec-2008		Open
<input type="checkbox"/> Brown, Casey	PO Approval	<a href="#">Standard Purchase Order 6105 has been approved</a>	19-Dec-2008		Open
<input type="checkbox"/> Stock, Pat	PO Approval	<a href="#">Standard Purchase Order 6112 has been approved</a>	19-Dec-2008		Open
<input type="checkbox"/> Stock, Pat	PO Approval	<a href="#">Standard Purchase Order 6120 has been approved</a>	19-Dec-2008		Open
<input type="checkbox"/> Stock, Pat	PO Approval	<a href="#">Standard Purchase Order 6121 has been approved</a>	19-Dec-2008		Open
<input type="checkbox"/> Stock, Pat	PO Approval	<a href="#">Standard Purchase Order 6122 has been approved</a>	19-Dec-2008		Open

Below the table are two tips: 'TIP Vacation Rules - Redirect or auto-respond to notifications.' and 'TIP Worklist Access - Specify which users can view and act upon your notifications.' At the bottom, there's a footer with links for Shop, Requisitions, Receiving, Contractors, Shopping Cart, Home, Logout, Preferences, Help, Diagnostics, About this Page, and Privacy Statement, along with a copyright notice: Copyright (c) 2006, Oracle. All rights reserved.

7. Click the Home link to return to the Personal Home Page (PHP).
8. On the Personal Home Page, click the Assets, Vision Operations (USA) responsibility to find the different menus in this responsibility.
- Note:** the first time you open an Oracle Applications form, you will get a "Warning" window to download J2EE. Click (B) Run.
9. Click the Financial Information link under Inquiry to open the Find Assets form.

The screenshot shows the ORACLE E-Business Suite interface. At the top, there's a navigation bar with links for Diagnostics, Logout, Preferences, and Help, and a message 'Logged In As OPERATIONS'. The main area is divided into two panels: 'Navigator' on the left and 'Favorites' on the right.

**Navigator Panel:**

- Advanced Planning Administrator
- Alert Manager, Vision Enterprises
- Application Developer
- Approvals Management Administrator
- Approvals Management Business Analyst
- Asset Inquiry, Vision Operations (USA)
- Assets, Vision Operations (USA)** (highlighted with a mouse cursor)
  - Bill Presentment Super User, Vision Operations (USA)
  - Business Intelligence System, Vision Operations (USA)
  - CADVew-3D Administration
  - CADVew-3D User
  - Cash Management, Vision Operations (USA)
  - Cash Management, Vision Payroll (USA)
  - Consolidation Manager
  - Contracts Workbench User
  - Credit Management Super User
  - Credit Scheduler
  - CRL 11i Projects
  - CRM Resource Manager, Vision Enterprises
  - Customer Support - Asset Maintenance
  - Customer Support Specialist
  - Customers Online Superuser
  - Daily Commodity Intelligence
  - Daily Customer Support Intelligence, Vision Operations

**Favorites Panel:**

- Home
- Documents
- Administration
- Profitability Manager
- Profitability Business Rule
- Profitability Process
- Profitability Documents
- Profitability Administration
- Payables Invoices
- Payments Manager
- Receivables Transactions
- Quick Sales Orders
- Maintain Customers

10. Enter "OPS CORP" in the Book field and click (B) Find.

**Find Assets**

**By Asset Detail**

Asset Number	Description
Tag Number	Category
Serial Number	Asset Key
Warranty Number	Asset Type
Status	

**By Book**

Book	OPS CORP	[...]	Group Asset
Dates in Service	-	<input type="checkbox"/> Show Disabled Groups	

**By Assignment**

Employee Name	Employee Number
Expense Account	Location

**By Source Line**

Supplier Name	Supplier Number
Invoice Number	Line Number
PO Number	Source Batch
Project Number	Task Number

**By Lease**

Lease Number	Lessor
Description	

**Buttons:** Clear, Find

11. Select any asset and go through the different fields such as Asset Number, Description, Tag Number, Category and Serial Number in this form.

**Assets**

**Operations**

Asset Number	Tag Number	Description	Category	Serial Number	Asset Type
100051	854213	BMW 850I	VEHICLE-OWNED LUXURY	BMW3384140	-
100071		LAND	LAND-OCCUPIED		
100072		BUILDING 100	BUILDING-OFFICE	--	-
100073		MANUFACTURING BUILDING	BUILDING-MANUFACTURING		
100074	854210	MACK TRUCK	VEHICLE-OWNED HEAVY	VIN88502T002	-
100075	853312	LEASED VEHICLE	VEHICLE-LEASED STANDARD	VIN81119000124	-
100076	854369	PERSONAL COMPUTER	COMPUTER-PC	PC7559202	-
100077		DESK	FURNITURE-DESKS		-
100078	854333	MACHINE	MACHINE-FABRICATE	XV16666601	-
100079	854444	STANDARD VEHICLE	VEHICLE-OWNED STANDARD	VIN557890091	-
100080		AIR CONDITION	TENANT IMPROVEMENT-REM	P0976655	-
100081	854226	DRILL PRESS	MACHINE-FABRICATE	63218978	-
100082		SOFTWARE FINANCIAL APPLI	COMPUTER-SOFTWARE		
100083		CAPITAL PROJECT	TENANT IMPROVEMENT-REM		
100084		CIP OFFICE BUILDING	BUILDING-OFFICE	--	-
100091		OAK DESK	FURNITURE-DESKS		-

**Buttons:** Assignments, Source Lines, Books

## **Close the Form**

12. Close the Form by using one of the following methods:

- Click (x) in the top right corner of the form, or
- (M) File > Close Form, or
- F4.

## **Practice - Switch Responsibility (Required)**

---

### **Overview**

In this practice, you learn how to switch responsibilities.

### **Tasks**

#### **Switch Responsibility**

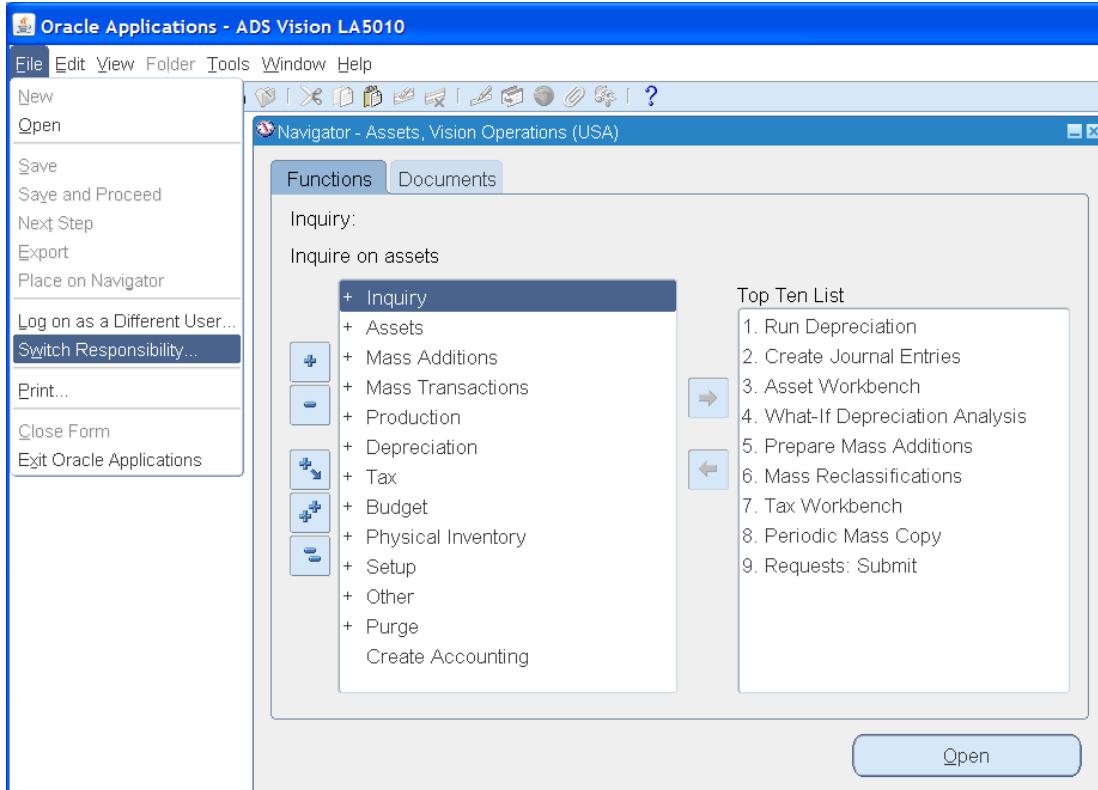
1. Switch responsibility from Assets, Vision Operations (USA) to General Ledger, Vision Operations (USA) using the Menu.
2. Switch responsibility from General Ledger, Vision Operations (USA) to Payables, Vision Operations (USA) using the Switch Responsibility icon.

## Solution – Switch Responsibility (Required)

At the end of the last practice, you were left using the Assets, Vision Operations (USA) responsibility.

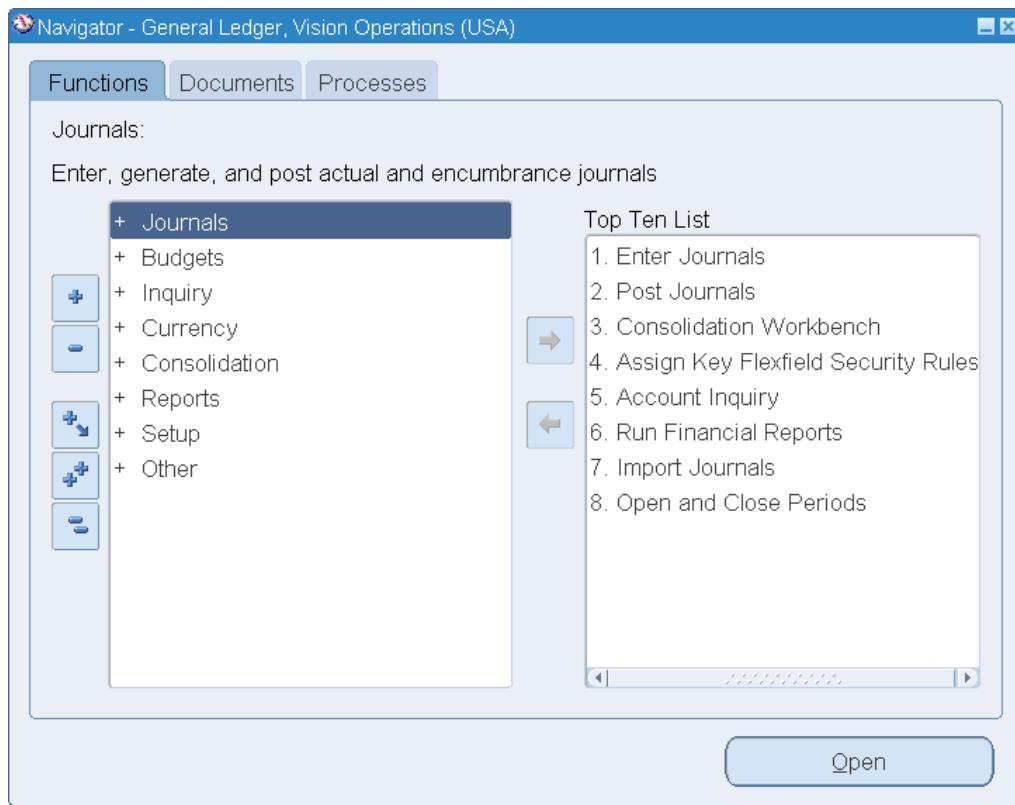
### Switch Responsibility Using the Menu

1. (M) File > Switch Responsibility...



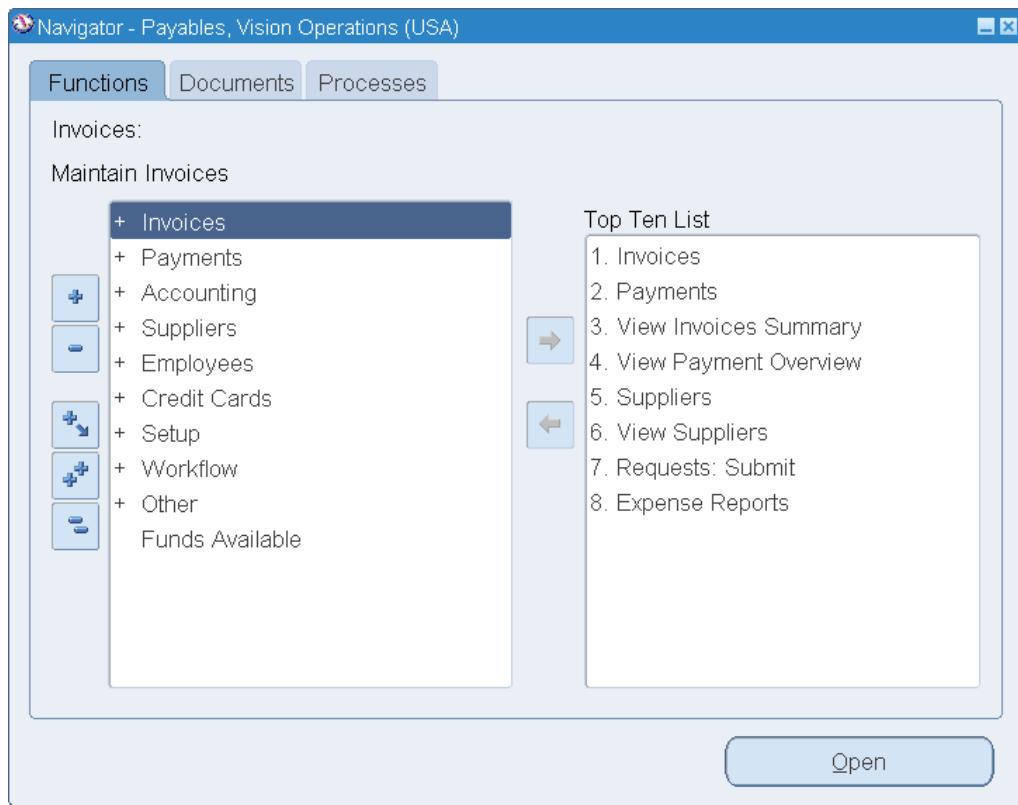
2. Select the General Ledger, Vision Operations (USA) responsibility.

- (B) OK



### Switch Responsibility Using the Icon

3. Click the Switch Responsibility icon  on the toolbar.
4. Select the Payables, Vision Operations (USA) responsibility.
  - (B) OK



## Guided Demonstration - Creating and Saving a Record (Required)

1. Verify you are logged in to the applications as the user operations.
2. Responsibility: Order Management Super User, Vision Operations (USA).
3. (N) Orders, Returns > Sales Orders to open Sales Order form.

### Creating and Saving a Record

4. Enter the following information:
  - Customer: A. C. Networks (LOV)  
**Note:** Other fields are automatically populated.
  - (T) Line Items

Line	Ordered Item	Qty
1.	AS54999 (LOV)	1
2.1	AS54888 (LOV)	1

**Note:** other fields in these rows are populated automatically.

5. (I) Save
  - Note the Sales Order number populated in the Order Number field by moving to (T) Order Information. \_\_\_\_\_
6. Close the Form.

## **Guided Demonstration - Retrieving and Deleting a Record (Required)**

---

1. Verify you are logged in to the applications as the user operations.
2. Responsibility: Order Management Super User, Vision Operations (USA).
3. (N) Orders, Returns > Sales Orders to open Sales Order form.

### **Retrieving a Record**

Demonstrate how a record can be retrieved using the keyboard and menu functions.

#### **Using the Keyboard Keys**

4. Press [F11].
5. Enter the customer name A.%Networks% in the Customer field.
6. Press [Ctrl]+[F11].
  - The sales orders records created for A. C. Networks are retrieved.
  - Use the up-arrow and down-arrows to show the record retrieved.

#### **Using Menu Functions**

7. (M) View > Query By Example > Enter
8. Enter a valid Order Number.
9. (M) View > Query By Example > Run
  - The sales order record is retrieved.

**Note:** Also show how a record can be retrieved using the Find Icon.

### **Deleting a Record**

10. Click (T) Line Items on the sales order record retrieved in the previous step.
11. Place your cursor on line 2.1.
12. (M) Edit > Delete
13. (I) Save
14. Verify the record has been deleted.

**Note:** Not all records can be deleted, often times if a record should no longer be used, you'll need to set an end date on the record.

## Practice - Creating, Saving, Searching, Editing, and Deleting a Record (Required)

---

### Overview

In this practice, you create, save a record, search or retrieve a record in the form, edit, and deleting a record.

### Assumptions

Replace XX with your initials or a terminal number as given by your instructor.

### Tasks

1. Responsibility: Human Resources, Vision Enterprises.
2. Navigate to the Positions form: Work Structures > Position > Description.

### Create and Save a Record

3. Create 123.XX position by entering the following information:

Field	Value
Position Number	123
Position Name	xx (replace XX with your initials or terminal #)
Type	Single Incumbent
Organization	Vision Operations
Job	ANA400.Analyst
Status	Active
Location	V1 Ship Site A (defaults)
FTE	1
Headcount	(Accept default)

4. Save the record.

### Search and Retrieve a Record

Search for Date Effective Name =123.XX using search criteria

5. Keyboard shortcuts:
  - Press [F11] and [Ctrl] + [F11].
6. Using the menu:
  - Query By Example > Run and Query By Example > Enter

### Edit a Record

7. Edit the Date Effective Name field details from 123.XX to 123.1XX.
8. Save the record.

## Delete a Record

9. Delete your 123.1XX record.

## Solution - Creating, Saving, Searching, Editing, and Deleting a Record (Required)

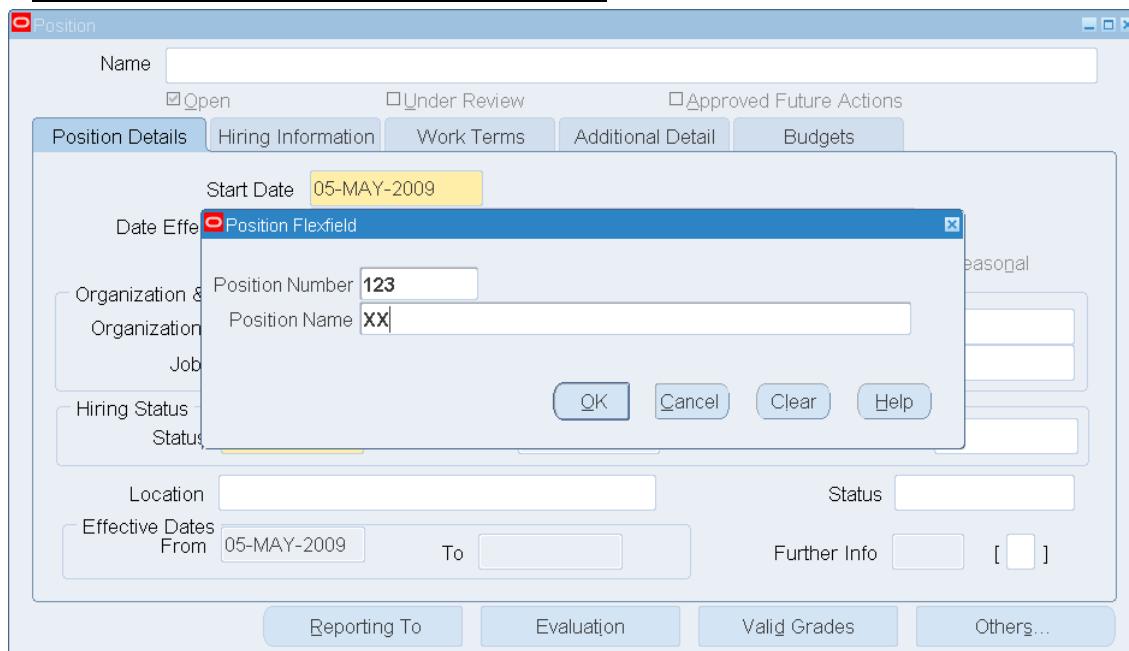
1. Responsibility: Human Resources, Vision Enterprises
  - From the Navigator: (M) File > Switch Responsibility and select Human Resources, Vision Enterprises.
  - From the Personal Home Page, click the (L) Human Resources, Vision Enterprises.
2. Navigate to the Positions form:
  - (N) Work Structures > Position > Description.

### Create and Save a Record

3. Click (B) New in the Find Positions window.
4. Enter the following information into the Name field:

**Note:** The position flexfield screen appears once you place the cursor in the “Date Effective” field on the Position screen.

Field	Value
Position Number	123
Position Name	XX



5. (B) OK.
6. (T) Position Details, enter the following information:

Field	Value
Type	Single Incumbent (LOV)
Organization	Vision Operations (LOV)
Job	ANA400.Analyst (LOV)

Field	Value
Status	Active (LOV)
Location	V1 Ship Site A (defaults)

Position

Name: 123.XX

Open     Under Review     Approved Future Actions

Position Details    Hiring Information    Work Terms    Additional Detail    Budgets

Start Date: 05-MAY-2009  
Date Effective Name: 123.XX  
Type: Single Incumbent     Permanent     Seasonal

Organization & Job  
Organization: Vision Operations    Proposed End Date:   
Job: ANA400 Analyst    Proposed End Date:

Hiring Status  
Status: Active    Start Date: 05-MAY-2009    Proposed End Date:   
Location: V1 Ship Site A    Status:   
Effective Dates  
From: 05-MAY-2009    To:     Further Info:  [  ]

Reporting To    Evaluation    Valid Grades    Others...

7. (T) Hiring Information, enter the following:

Field	Value
FTE	1
Headcount	(Accept default)

Position

Name: 123.XX

Open     Under Review     Approved Future Actions

Position Details    Hiring Information    Work Terms    Additional Detail    Budgets

FTE: 1    Headcount: 1    Bargaining Unit:   
Earliest Hire Date:     Fill by Date:      Permit Recruiting

Proposed Entry Salary  
Payroll:     Salary Basis:   
Grade:     Step:     Grade/Scale Rate:   
Value:     Grade Rate Range:    

Probation  
Duration:     Duration Unit:   
Overlap  
Duration:     Duration Unit:

Proposed Layoff  
FTE:     Date:

Reporting To    Evaluation    Valid Grades    Others...

8. Save the record:

- (M) File > Save
9. Clear the record:
- (M) Edit > Clear > Record.

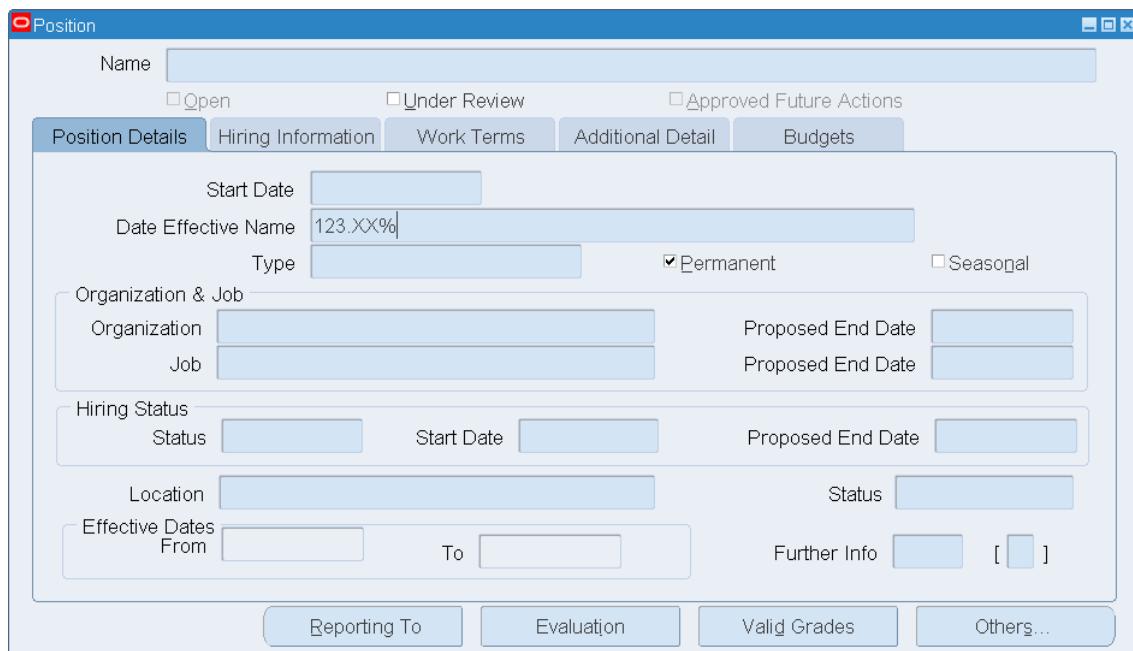
### Search and Retrieve a Record.

**Note:** A record can be retrieved or searched for in two ways.

#### Using Shortcuts

10. Press [F11].
11. Enter the partial value, such as 123.XX% in the Date Effective Name field.

(Note: "%" is a wildcard, which can be used to retrieve the records, which have 123.XX as part of the record values.)



12. Press [Ctrl]+[F11], to execute the query.
13. Clear the record using the "Clear Record" icon .

#### Using the Menu

14. (M) View > Query By Example > Enter
15. Enter a partial value, such as 123.XX% in the Date Effective Name field.
16. (M) View > Query By Example > Run

#### Note

- While using the Menu option to find a record, we cannot use Query By Example > Run directly. Instead, we have to follow the above steps to enter the search criteria first and then query as per the given criteria.
- A record can also be retrieved using the Find icon . Then enter the requisite information to retrieve the record or records.

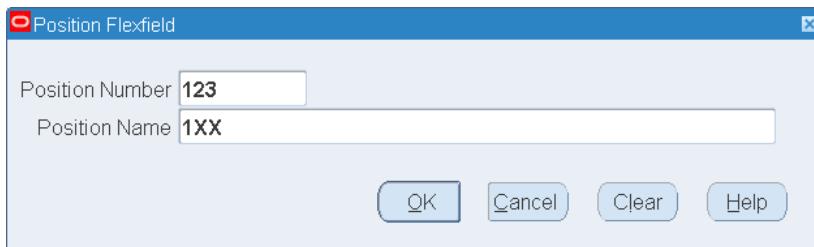
### Edit a Record

17. Place cursor in the Start Date field

- Click the Edit Field icon.
- Observe the Calendar screen, do not change the date.



- (B) Cancel to close the calendar pop-up.
18. Place your cursor in the Date Effective Name field, the Position Flexfield window opens.  
 19. Change the Position Name from XX to 1XX.



- (B) OK
  - (B) Correction
20. (I) Save

The screenshot shows the 'Position' application window. At the top, there is a toolbar with buttons for 'Open', 'Under Review', and 'Approved Future Actions'. Below the toolbar, there are tabs: 'Position Details' (selected), 'Hiring Information', 'Work Terms', 'Additional Detail', and 'Budgets'. The main area contains several input fields and dropdown menus. Key visible data includes:

- Name:** 123.1XX
- Start Date:** 05-MAY-2009
- Date Effective Name:** 123.1XX
- Type:** Single Incumbent
- Organization:** Vision Operations
- Job:** ANA400.Analyst
- Hiring Status:** Active
- Location:** V1 Ship Site A
- Effective Dates:** From 05-MAY-2009, To [empty]
- Status:** [empty]
- Proposed End Date:** [empty]
- Further Info:** [empty] [..]

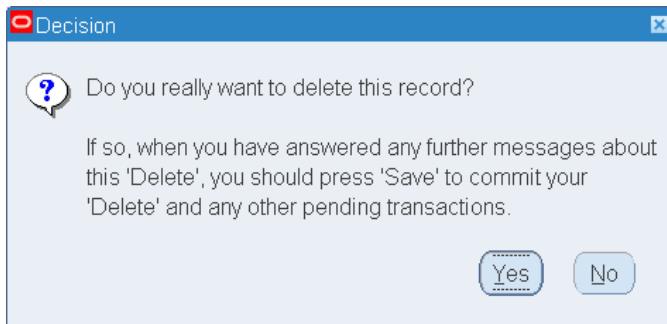
At the bottom of the form are buttons for 'Reporting To', 'Evaluation', 'Valid Grades', and 'Others...'. The entire form is set against a light blue background.

### Delete a Record

21. Verify your 123.1XX record is selected.

22. (M) Edit > Delete

- In the Decision dialog box, (B) Yes.



- (B) Purge



23. Save to make the changes to the database.

- Suggestion: Retrieve the 123.1XX record. The record cannot be retrieved.

**Note:** All records cannot be deleted in this manner. Those records, which cannot be deleted, need to have an end date given. After the end date is set, the records cannot be used.

24. Close the form and return to the Personal Home Page (PHP).

## Practice - Reviewing the Help Menu Item

---

### Overview

In this practice, you use various aspects of Oracle Applications' online Help. You learn how to access online Help from Personal Home Page. You will also access Keyboard Help and learn how to access Record History for data entered in a form.

### Tasks

1. Verify you are logged in to the Oracle Applications.
2. Access the online Help from Personal Home Page. Navigate to the form-based interface. For example: Open the Sales Orders form in the Order Management Super User, Vision Operations (USA) responsibility.
3. Access Keyboard Help.
4. Find Record History for an existing record.

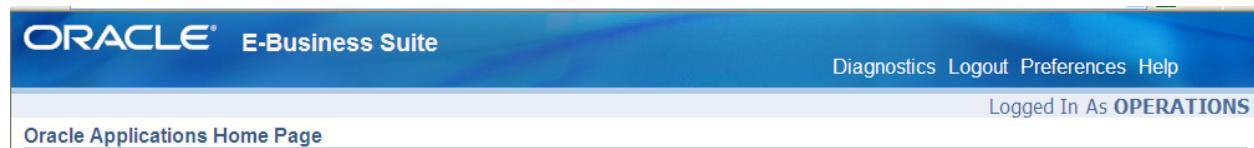
## Solution: Reviewing the Help Menu Item

---

1. Verify you are logged in to the Oracle Applications as the user operations.

### Accessing Online Help from the Personal Home Page

2. Click the Help link on the top right corner of the PHP to open the online Help.



**Note:** Navigate through all the Tabs (Contents, Search, and View Topic) to familiarize yourself with the interface. Clicking on the Contents tab gives you a list of topics you can view.

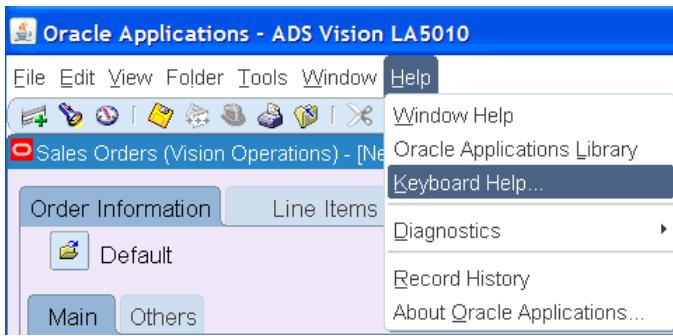


3. Close the online Help to return to Personal Home Page.

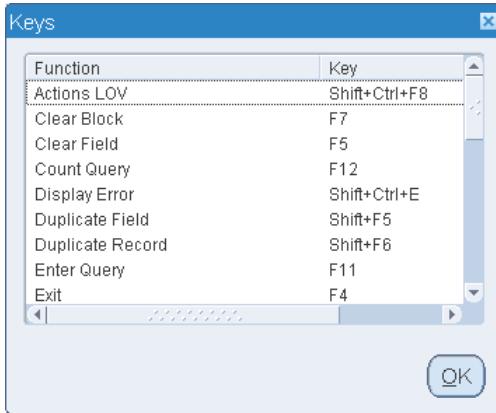
**Note:** You can close the online Help simply by closing your browser window.

### Accessing Keyboard Help

4. Return to the Navigator
5. Responsibility: Order Management Super User, Vision Operations (USA).
6. Click the Sales Orders link under the Orders, Returns submenu to open the Sales Order form.
7. (M) Help > Keyboard Help



**Note:** Keyboard shortcuts are displayed.



- Click (B) OK to close the Keys window.

### Finding Record History

- Open the record for which you would like to find Record History.
  - In the Sales Order form Press [F11].
  - Enter Customer Number as 1608.
  - Press [Ctrl] + [F11] to execute the query.

**Sales Orders (Vision Operations) - 67369, Business World**

**Order Information** Line Items

**Main** Others

**Customer** Business World

**Customer Number** 1608

**Customer PO**

**Customer Contact**

**Blanket Number**

**Ship To Location** San Jose (OPS)

2391 L Street

San Jose, CA, 95106, US

**Bill To Location** San Jose (OPS)

2391 L Street

San Jose, CA, 95106, US

**Order Number** 67369

**Order Type** Mixed

**Date Ordered** 27-APR-2009 02:06:03

**Price List** Corporate

**Salesperson** Sprague, Mr. Howard

**Status** Entered

**Currency** USD

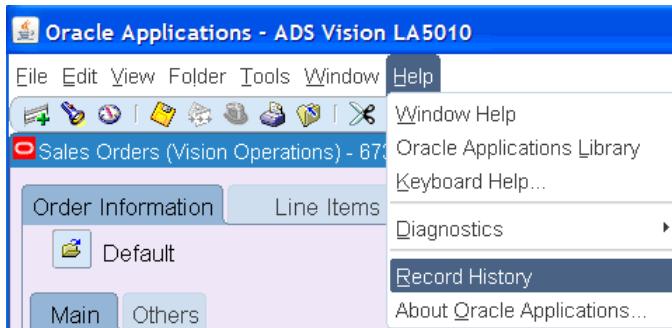
**Subtotal** 19,000.00

**Tax** 1,710.00

**Charges** 0.00

**Total** 20,710.00

10. Navigate to Help > Record History to display record history details.



- Record history details are displayed.



**Note:** Observe the information displayed for the record. E.g., Table/View Name, Created By/Update By, Dates and so on.

11. Click (B) OK to close About This Record.

12. Close the form.

## **Guided Demonstration - Running a Single Request Report (Required)**

1. Verify you are logged in as Operations.

### **Run a Single Request Report**

2. Responsibility: Order Management Super User, Vision Operations (USA)
3. Navigate to the submit request form (N) Reports, Requests > Run Reports.
4. Choose the default Single Request and click (B) OK.
  - Select the Orders Summary Report from the LOV.
  - In the parameters window, accept the default and click (B) OK.
  - Click (B) Submit.
  - Note the Request ID \_\_\_\_\_ and click No on the decision screen.
5. View the above request using (M) View > Requests.
6. Choose the default All My Requests.
  - Click (B) Find.
  - Click (B) Refresh Data until the above request completes normally.
  - Click (B) View Output to view the Orders Summary report.

## Practice - Running Reports and Programs

---

### Overview

In this practice, you run a Standard Request Submission (SRS), create a Request Set, and use SRS to run the Request Set.

**Note:** The purpose of this practice is to understand how to use the Wizard to create a Request Set, not to teach you which reports to run, or what parameter values should be used for specific reports.

### Assumptions

- Replace XX with your terminal number or initials.

### Tasks

1. Verify you are logged into the applications as the user operations.
2. Responsibility: Human Resources, Vision Enterprises
3. Navigate to the Submit Request window:
  - (N) Processes and Reports > Submit Processes and Reports
4. Enter the following information:
  - Name: Employee Periodic Detail Report
  - Enter the following Parameters:

Field	Value
Beginning Date Paid	Enter a date two months prior to Current/System date
Ending Date Paid	Select Current/System Date
Jurisdiction Level	Federal (defaults)
Detail Level	Summary within Selected Period (defaults)
Output file type	Comma Delimited (defaults)

- Submit the request.
5. View the Output.

### Create a Request Set Using the Request Set Wizard:

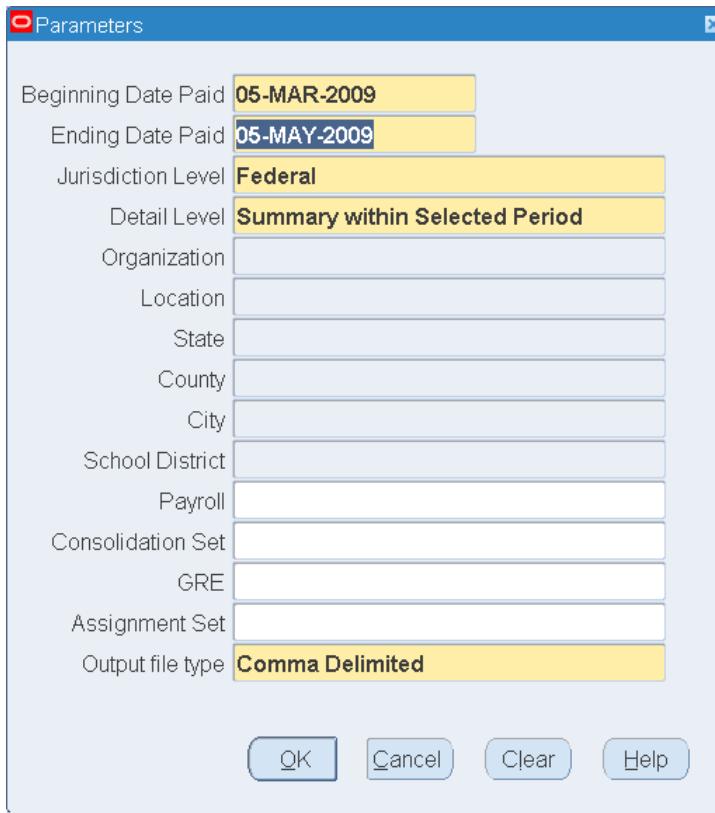
6. Switch responsibility to System Administrator to create the Request Set.
7. Use Standard Request Submission to run your Request Set.
  - (N) Requests > Set
8. Schedule your Request Set to run once a week for four weeks.

## Solution: Running Reports and Programs

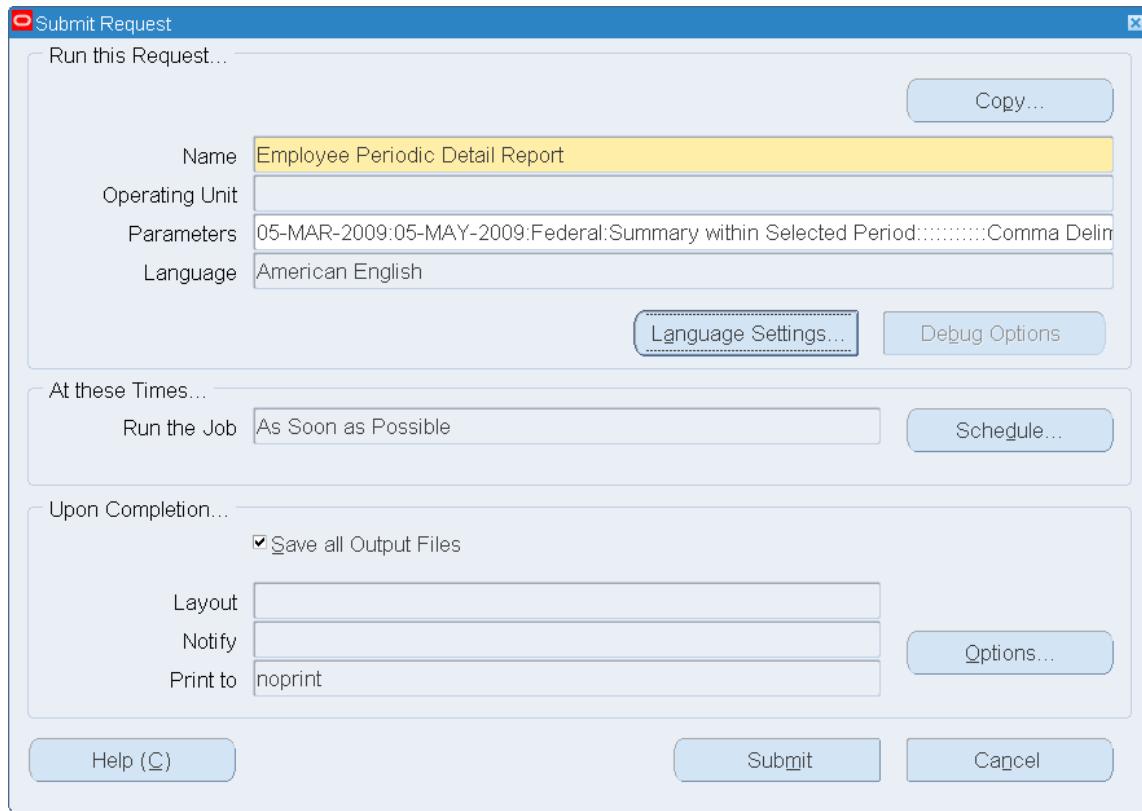
Verify you are logged in to the Oracle Applications as the user operations.

1. Responsibility: Human Resources, Vision Enterprises.
2. Navigate to Submit Processes and Reports link under the Processes and Reports submenu to open the Submit a New Request dialog box.
  - (N) Processes and Reports > Submit Processes and Reports.
3. Select the default Single Request and click (B) OK to open the Submit Request dialog box.
4. Enter the following information:
  - Name: Employee Periodic Detail Report (LOV)
  - (B) OK
  - Enter the following in the Parameters window:

Field	Value
Beginning Date Paid	Enter a date two months prior to Current/System date
Ending Date Paid	Select Current/System Date
Jurisdiction Level	Federal (defaults)
Detail Level	Summary within Selected Period (defaults)
Output file type	Comma Delimited



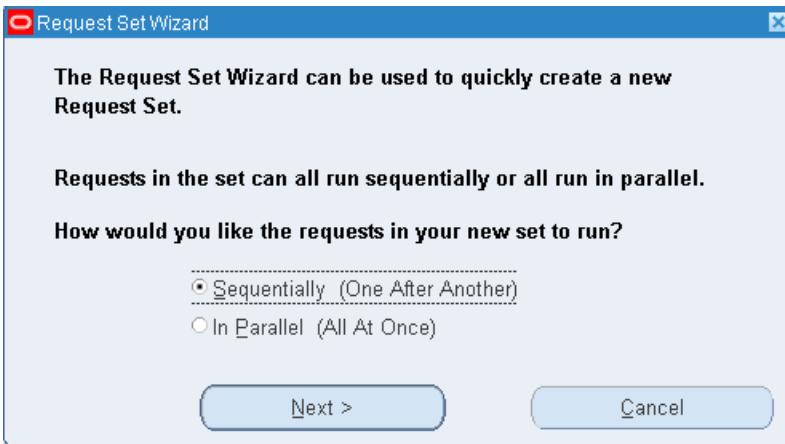
- (B) OK



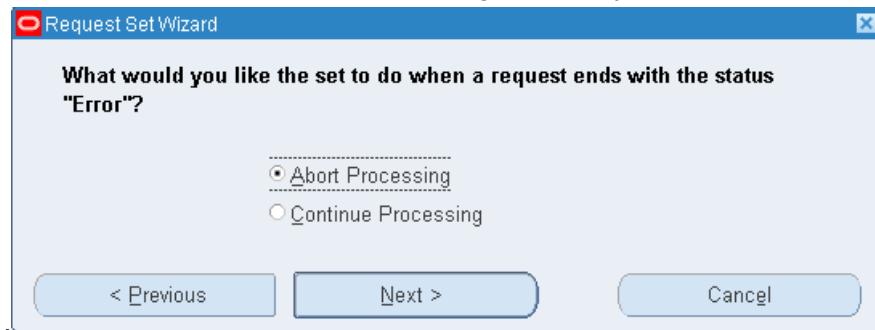
- (B) Submit
    - Note the Request ID: \_\_\_\_\_
  - (B) No when asked whether you would like to submit another request
  - (M) View > Requests
    - Click (B) Find to find all your requests
    - If phase of request is not completed, click (B) Refresh until you see that your request has completed with a status of Normal.
    - Click (B) View Output.
5. Close the output window.
  6. Close the Form.
  7. Switch responsibility to System Administrator.

### Create Request Set Using the Request Set Wizard

8. Responsibility: System Administrator
  9. (N) Requests > Set
  10. Click (B) Request Set Wizard in the form.
- Note:** Do not fill in any fields on the request set form.
11. Accept the default value to run your requests sequentially. Click (B) Next. This will create one stage for each request in the set.



12. Accept the default to Abort Processing if one of your requests ends in "Error." Click (B) Next.

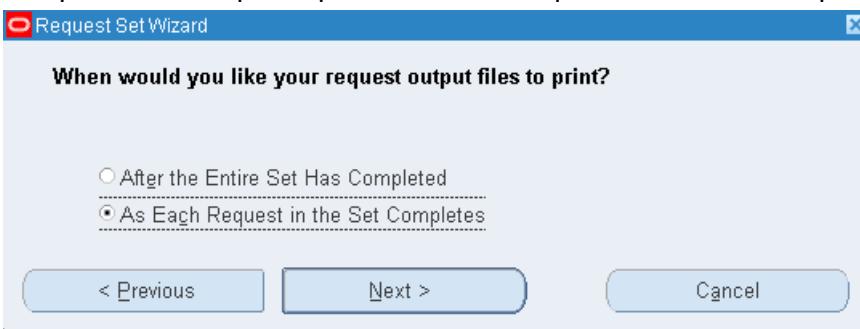


13. Enter the required information for your Request Set. Click the (B) Next.

Field	Value
Set	XX Weekly Reports
Application	Application Object Library
Description	XX Weekly Reports

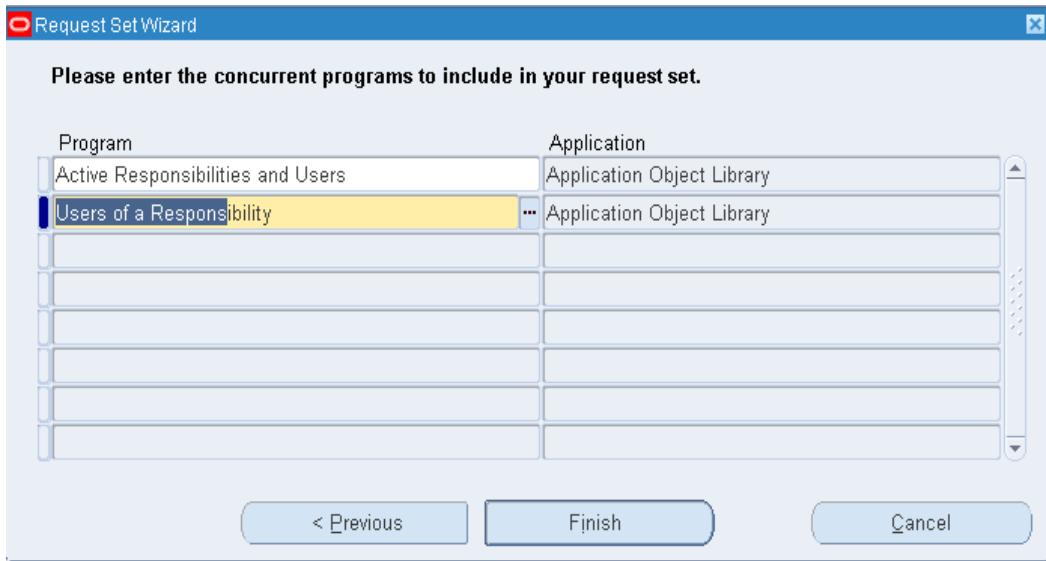
14. (B) Next

15. Accept the default print option As Each Request in the Set Completes by clicking (B) Next.

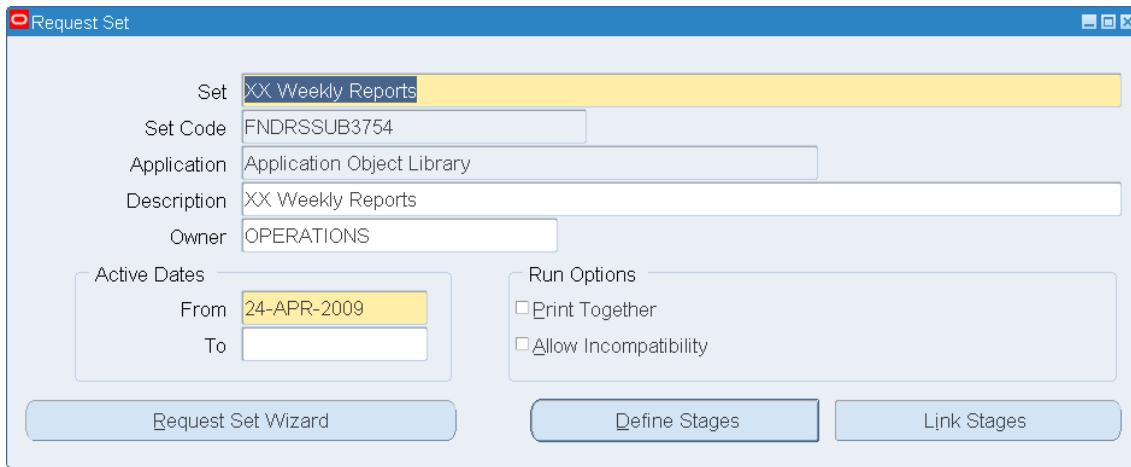


16. Select the concurrent program(s) you want to include in the request set:

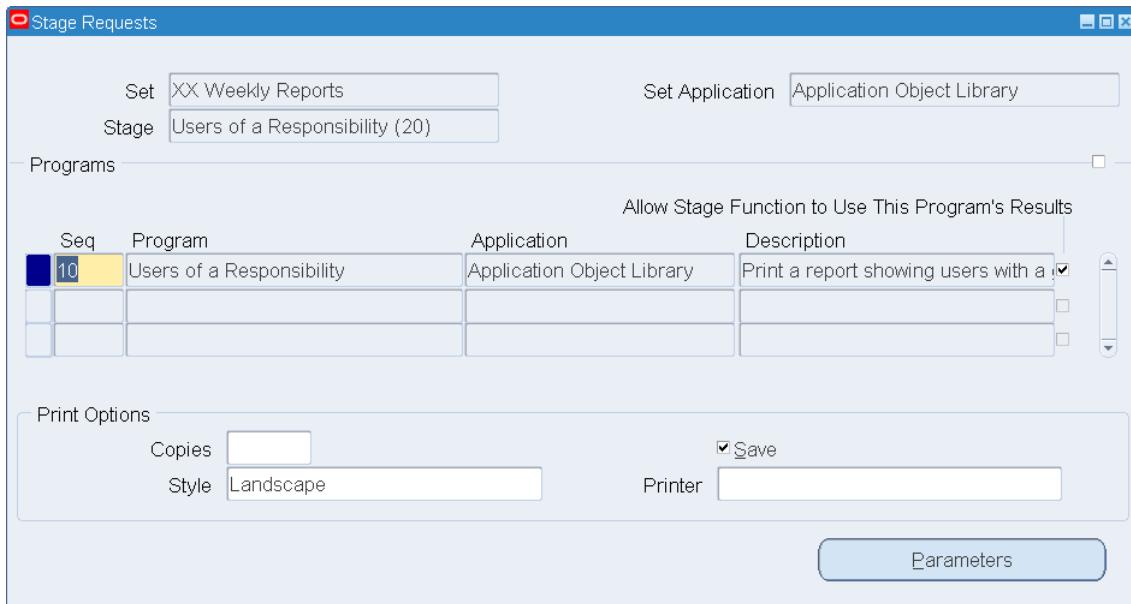
- Select Active Responsibilities and Users (LOV).
- (B) OK
- Select Users of a Responsibility (LOV).
- (B) OK



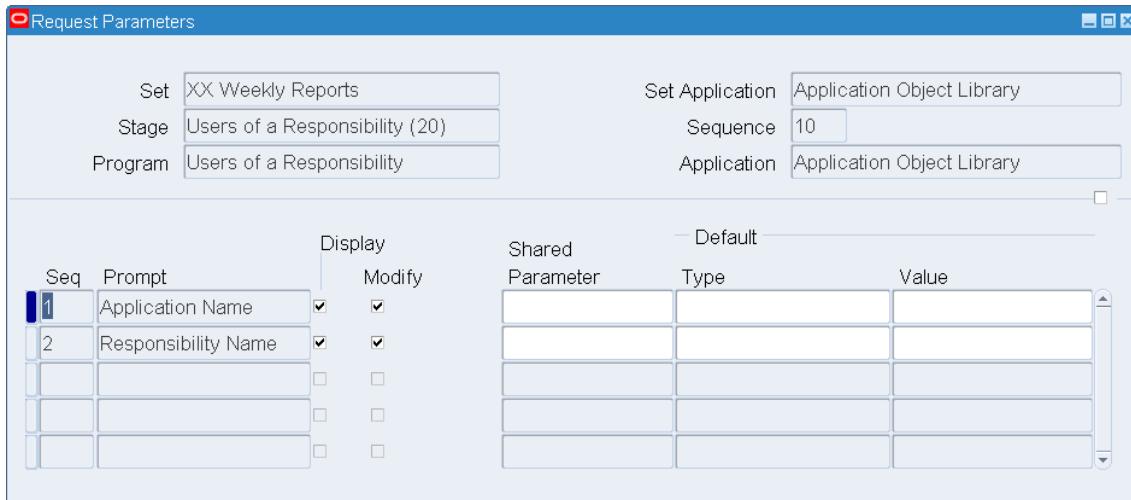
17. Click (B) Finish.
18. Click (B) OK in the Note dialog box that appears.



19. Click (B) Define Stages to review your two stages.
20. Click (B) Requests for Users of a Responsibility (20).



21. Click the (B) Parameters to view the parameters for this program. You can also review your other stages, requests, and parameter windows.



**Note:** Close the Request Parameters and Stage Requests window upon review completion.

22. Repeat Steps 20 and 21 for Stage: Active Responsibilities and Users (10)  
 23. Close all windows until you are have returned to the Request Set window.  
 24. Click (B) Link Stages to view the default values you selected to link your stages.
- Observe: the Start Stage value and the values for Success, Warning, and Error.
  - Click (B) Cancel after you have completed your review.

**Link Stages**

Set	XX Weekly Reports	Set Application	Application Object Library
Start Stage	Active Responsibilities and Users (10) <span style="float: right;">...</span>		
Display Sequence		Stage To Proceed To On...	
Name	Success	Warning	Error
10 Active Responsibilities and Users	Users of a Responsibility	Users of a Responsibility	
20 Users of a Responsibility (20)			

**Stage Properties**

Description

The Return Value of this Stage Affects the Set Outcome

Done Cancel

25. Close the Request Set form.
  26. Navigate to the Standard Request Submission form.
    - (N) Requests > Run
  27. Select the Request Set option button and click (B) OK.
  28. Select your XX Weekly Reports (LOV).

**Submit Request Set**

Run this Request...

Request Set: XX Weekly Reports Copy...

Program	Operating Unit	Stage	Parameters
Active Responsibilities and Users		Active Responsibilities an	
Users of a Responsibility		Users of a Responsibility	
<span style="float: left;">◀</span> <span style="float: right;">▶</span>			

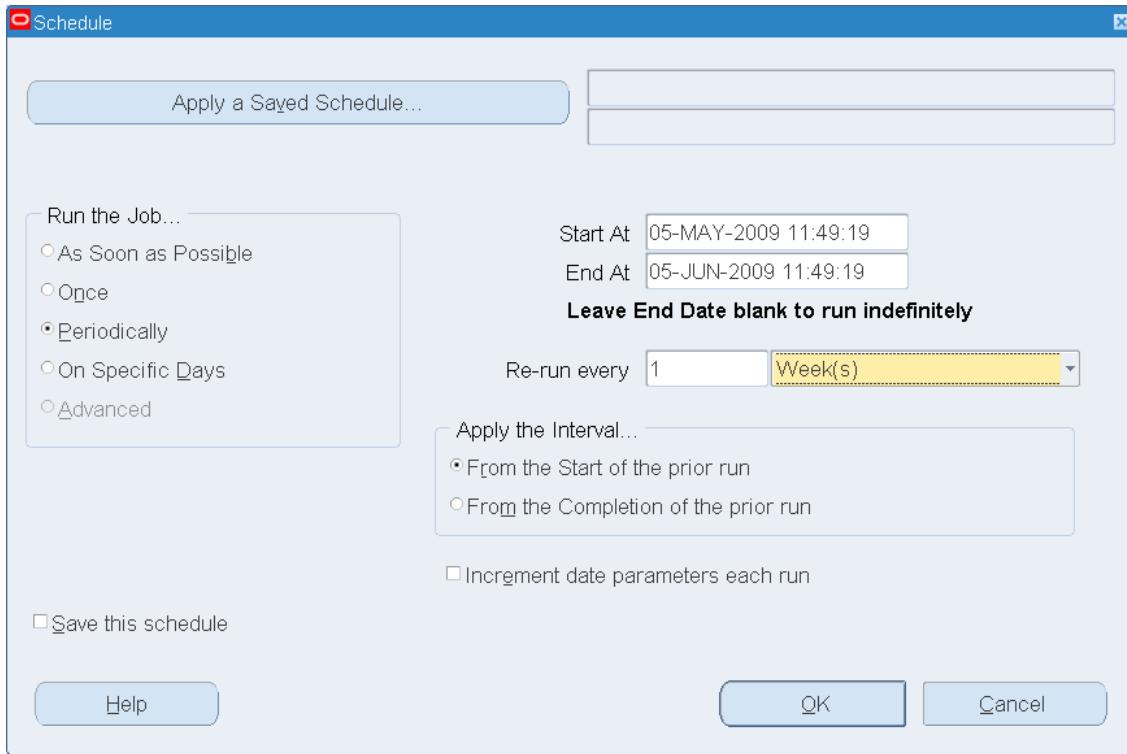
Options...

At these Times...

As Soon As Possible Schedule...

Help (A)
Submit
Cancel

29. Complete the parameter values for each report:
- Active Responsibilities and Users has no parameters.
  - Users of a Responsibility: Enter System Administration for Application Name and System Administrator for Responsibility Name.
30. Click (B) OK to close the parameter window.
31. Click (B) Schedule.
32. Select the Periodically option under the Run the Job section to set the schedule.
- End Date: one month from today
  - Re-run every 1 Week(s)



33. Click (B) OK.
- Note:** You can save this schedule by selecting the “Save this schedule” check box.
34. Click (B) Submit to submit the request.
35. Record your Request ID and Click No when asked to submit another request.
36. View your Reports online.
- (M) View > Requests
  - Accept the All My Requests option by clicking (B) Find in the Find Requests window.
37. Click the line with the completed Users of a Responsibility report.
38. Click (B) View Output to view the report online.

Users with a Given Responsibility

Application Name: System Administration  
Responsibility Name: System Administrator

User Name	Start Date	End Date	Description
ACHANG	17-OCT-2003		
ADB	08-APR-1997		
ADCOCKPIT	27-FEB-2003		A&D Manager
ADMIN1	29-SEP-2006		
ADSDEMO1	04-DEC-2006		
AEHRMS	01-JAN-1990		
ALAN	07-DEC-1997	09-APR-1998	Alan Miller
AOLCLASS	20-JAN-1998		Demo for AOL Class (Develop Extensions to Oracle Applications)
APOTTER	07-AUG-2002		
APPSADMIN	27-DEC-2005		Applications System Administrator
ARC-PUR	06-FEB-1998		Archive Purge user for Vision Operations
ARGENTINA	31-JAN-2003		Vision Argentina User
ASGADM	01-AUG-2002		asgadm
AT1	01-NOV-1997	09-APR-1998	AppTech Build Team
AT2	05-JAN-1998	09-APR-1998	AppTech Build Team

**Note:** Navigating around the online report depends on the viewer you are using at your site.

39. Close the output window.
40. Close the form to return to the navigator.

## Guided Demonstration - Running a Business Intelligence (BI) Publisher Report (Required)

---

### Logging In to Oracle Applications

Verify you are logged in as the user `operations`.

### Running the Report

1. Responsibility: Purchasing, Vision Operations (USA).
2. Submit a single request.
  - (N) Reports > Run
3. Select the PO Output for Communication (LOV).
4. In the parameters window:
  - Print Selection: All
  - Purchase Order Numbers From: Select from LOV

**Note:** the Purchase Order Numbers From value is defaulted to the To parameter.
5. Click (B) OK in the Parameters window.
6. Verify the default Operating Unit: Vision Operations.
7. Click (B) Submit in the Submit Request window.
8. Note the Request ID \_\_\_\_\_.
9. Click (B) No in the decision screen.
10. View the above request using (M) View > Requests.
  - Choose the default All My Requests.
  - Click (B) Find.
  - Click (B) Refresh Data until the above request completes normally.
  - Click (B) View Output to view the PO Output for Communication report. Note the output is in PDF format.

## Practice - Creating a New User (Required)

---

### Overview

In this practice, you create a new user, assign responsibilities to the user and login in as the newly created user.

### Assumptions

- Replace XX with your terminal number or initials.
- You must have access to an Oracle Application Vision database, or a comparable training or test instance at your site on which to complete this practice.

### Tasks

#### Creating a New User

1. Use the information below to define your new user:

Field Name	Value
Username	XXEBSTUDENT (where XX is your terminal ID or initials)
Password	oracle (re-enter password to verify)

#### Assign Responsibilities

2. Assign the following Responsibilities to your user:

Responsibility
Purchasing, Vision Operations (USA)
Payables, Vision Operations (USA)
Payables, Vision Services (USA)
System Administrator
Inventory, Vision Operations (USA)
General Ledger, Vision Operations (USA)
Human Resources, Vision Enterprises
Assets, Vision Operations (USA)
Alert Manager, Vision Enterprises
Oracle Pricing Manager, Global
Order Management Super User, Vision Operations (USA)
Receivables, Vision Operations (USA)

3. Accept the defaults for all other fields. Use the Security Group "Standard" for a responsibility if none defaults in.

### **Login as Your Newly Created User**

4. Sign on again using your username with oracle as the password.
5. Change the password when prompted. You change the password by typing the old password (`oracle`), and then assigning a new password (e.g., `welcome`). You will retype the new password to verify.
6. Verify all the responsibilities you defined in Step 2 are available.

## Solution: Creating a New User (Required)

---

Verify you are logged in as the user OPERATIONS.

### Creating a New User

Responsibility: System Administrator

1. Navigate to the Define Users Window.
  - (N) Security > User > Define
2. Specify User details.

Field Name	Value
Username	XXEBSTUDENT (where XX is your terminal ID or initials)
Password	oracle (press [Tab], re-enter password to verify)

### Assign Responsibilities

3. (T) Direct Responsibilities, add the following responsibilities:

Responsibility
Purchasing, Vision Operations (USA)
Payables, Vision Operations (USA)
Payables, Vision Services (USA)
System Administrator
Inventory, Vision Operations (USA)
General Ledger, Vision Operations (USA)
Human Resources, Vision Enterprises
Assets, Vision Operations (USA)
Alert Manager, Vision Enterprises
Oracle Pricing Manager, Global
Order Management Super User, Vision Operations (USA)
Receivables, Vision Operations (USA)

The screenshot shows the 'Users' window in Oracle E-Business Suite. The 'User Name' field is set to 'XXEBSTUDENT'. The 'Status' dropdown is set to 'I'. Under 'Password Expiration', the 'None' radio button is selected. On the right, there are fields for 'Person', 'Customer', 'Supplier', 'E-Mail', and 'Fax'. Below these are 'Effective Dates' from '27-MAY-2009' to 'To'. At the bottom, tabs for 'Direct Responsibilities', 'Indirect Responsibilities', and 'Securing Attributes' are visible. The 'Securing Attributes' tab is active, displaying a grid of responsibilities mapped to applications and security groups.

Responsibility	Application	Description	Security Group	From	To
Purchasing, Vision Operat...	Purchasing		Standard	27-MAY-2009	
Payables, Vision Operations	Payables		Standard	27-MAY-2009	
Payables, Vision Services (U)	Payables		Standard	27-MAY-2009	
System Administrator	System Administration		Standard	27-MAY-2009	
Inventory, Vision Operations	Inventory		Standard	27-MAY-2009	

4. Save your record  
**Hint:** (M) File > Save or Ctrl+S or Save Icon
5. (M) File > Exit Oracle Applications
6. Click (B) OK.
7. Click (L) Log out on the Personal Home Page

#### **Logging in as your Newly Created User**

8. Log in as the new User

Field Name	Value
User Name	XXEBSTUDENT (where XX is your terminal ID or initials)
Password	oracle



9. (B) Login
10. The system will prompt you to change your password:

Field Name	Value
Current Password	oracle
New Password	welcome
Re-enter New Password	welcome

Change Password

\* Current Password

\* New Password

\* Re-enter New Password

Password must be at least 5 characters long.

**Submit** **Cancel**

\* Indicates required field

Logout

About this Page Privacy Statement Copyright (c) 2006, Oracle. All rights reserved.

### 11. (B) Submit

Oracle Applications Home Page

**Navigator**

Personalize

- Alert Manager, Vision Enterprises
- Application Diagnostics
- Assets, Vision Operations (USA)
- General Ledger, Vision Operations (USA)
- Human Resources, Vision Enterprises
- Inventory, Vision Operations (USA)
- Oracle Pricing Manager, Global
- Order Management Super User, Vision Operations (USA)
- Payables, Vision Operations (USA)
- Payables, Vision Services (USA)
- Purchasing, Vision Operations (USA)
- Receivables, Vision Operations (USA)
- System Administrator

Please select a responsibility.

**Favorites**

Personalize

You have not selected any favorites. Please use the "Personalize" button to set up your favorites.

### 12. Verify all the responsibilities assigned to your user are listed.

## Guided Demonstration - Setting Profile Options (Optional)

---

Verify you are logged into the Oracle applications.

### Overview

Demonstrate the differences between setting System and Personal Profile Options.

#### Set Personal Profile Options

Responsibility: System Administrator

(N) Profile > Personal

- Find the Profile Option: Java Color Scheme

**Note:** Point out that the Default Value is set to swan and a user can choose to set their color scheme different from the default.

- Select a color scheme value at the User Level (something other than swan)
- Close the Form.

**Note:** Upon returning to the navigator you'll see that the color scheme is still set to the swan color scheme. For the new profile option value to take place, you'll need to completely log out of the applications and log back in.

- Log out
  - Log back in and open the Personal Profile Option form.
- Note:** Point out that the Java Color scheme displayed is the one you selected.

- Reset the Java Color Scheme User Level value back to null (no value).

#### Set System Profile Values

Responsibility: Inventory, Vision Operations (USA)

(N) Items > Master Items

- Select Organization: M1-Seattle Manufacturing (LOV).

**Note:** Point out the default value for Item Status, which is currently set to Active.

- Close the Form.

Responsibility: System Administrator

(N) Profile > System

- Enter the following values in the Find form:

Field	Value
Application	Inventory
Responsibility	Inventory, Vision Operations (USA)
User	OPERATIONS
Profile	INV: Default Item Status

- (B) Find
- Update the User Level by selecting Inactive
- Save and close the form.

Responsibility: Inventory, Vision Operations (USA)

(N) Items > Master Items

13. Select Organization: M1-Seattle Manufacturing  
**Note:** Point out the default value for the Status field.
14. Close all forms and return to the Navigator.

## Guided Demonstration - Entering an Item, Discussing Key and Descriptive Flexfields (Required)

---

### Entering a System Item

1. Responsibility: Inventory, Vision Operations (USA)
2. Navigate to the Items window.
  - (N) Items > Master Items, select V1 – Vision Operations from the LOV.
3. Enter an item:

Item	Description
XXComputer Server	High Speed Server

4. Save.
- Note:** Point out that the Item field is a key flexfield that happens to be defined as a single segment and no validation!
5. (T) Purchasing

Field	Value
Purchased	Checked
Purchasable	Checked

**Note:** Point out that the Expense Account is the Accounting Key Flexfield owned by General Ledger.

6. Place your cursor in the Asset Category field:

Field	Value
Major Category	COMPUTER
Minor Category	Server

**Note:** Point out that Assets own the Asset Category Flexfield. This is a two-segment flexfield, where the second segment is dependent on the first. For example, if you choose Computer in the first segment, you would not want to see Land when you selected a value in the second segment.

7. Click (B) OK
8. Save.
9. (M) Tools > Categories
  - Verify Purchasing defaults as the Category Set (You may have to press [Ctrl] + [F11] if default categories are not displayed.)
10. Place cursor in the Category field (MISC.MISC defaults, but you will override this).
11. Activate the list of values.
 

**Note:** Point out that this is the PO Item Category key flexfield.
12. Click (B) Combinations
  - Enter % in the Item Category field and press tab.
  - (B) OK

Item Category	Commodity	Description
204	53	Microcomputers, Desktop or Towerbased

- Click (B) OK

**Note:** Point out that the Category field now reflects 204.53 based on the selection made.

13. Save.
14. Close the Category Assignment window.
15. Place cursor in the descriptive flexfield to the right of the description field.

**Note:** Point out that when the cursor enters a flexfield field, profile options determine whether or not it automatically opens. Point out that there are several fields in this descriptive flexfield, they are of different sizes and some have a list of values/validation.

16. Close windows till you are back at the Navigator.

## Guided Demonstration - Entering an Asset, Discussing Context Sensitivity (Required)

---

### Entering an Asset (a truck)

1. Responsibility: Assets, Vision Operations (USA)
2. Navigate to the Assets window.
  - (N) Assets > Asset Workbench
3. Click (B) QuickAdditions
  - Description: XXTruck, Heavy
4. Place cursor in Category field, invoke the list of values

Field	Value
Major Category	VEHICLE
Minor Category	OWNED HEAVY

**Note:** Point out the dependency of the minor category on the major category.

5. Click (B) OK
- Note:** The descriptive flexfield opens.

Field	Value
License Plate	GG678
Insurance Company	MIDLAND
Number of Axles	6

6. Click (B) OK

Field	Value
Book	OPS CORP
Cost	750000

7. Select the List of Values in the Expense Account field.

Field	Value
Account Alias	Bad Debts

8. Click (B) OK
9. Activate the list of values for the Department segment.
  - Select: 000
10. Click (B) OK twice.
11. Activate the list of values for the Location field.
  - Select: New York

**Note:** Point out that based on the configuration for the Vision instance, the Location field populates with Country-State-City-Building. Also, highlight that clicking in this field again opens key flexfield, where values can be changed.

12. Click (B) OK

**Note:** Point out that the Location Key Flexfield is an example of another key flexfield. The Location Key Flexfield is owned by Assets.

13. Save.
14. Click (B) OK to acknowledge the message providing the asset number.
15. Close the Quick Additions window.

### Entering an Asset (a building)

16. Click (B) QuickAdditions
  - Description: Building
17. Place cursor in Category field, invoke the list of values

Field	Value
Major Category	BUILDING
Minor Category	OFFICE

**Note:** Point out the dependency of the minor category on the major category.

18. Click (B) OK
 

**Note:** Point out the dependency of the minor category on the major category.
19. Click (B) OK
 

**Note:** Point out that the descriptive flexfield is linked to the value in the first segment of the key flexfield. This time the descriptive flexfield asks for information related to a building.
20. Close windows to return to the Navigator.

## Practice - Creating Value Sets (Required)

---

### Overview

In this practice you will create value sets.

### Assumptions

- Verify you are logged into the Oracle applications as XXEBSTUDENT.
- Replace XX with your terminal number or initials.
- You must have access to an Oracle Application Vision database, or a comparable training, or test instance at your site on which to complete this practice.

### Tasks

#### Creating a Value Set

- Responsibility: System Administrator
- Navigate to the Value Sets window:
  - (N) Application > Validation > Set
- Create the independent value set:

Field Name	Value
Value Set Name	XXPO_CLASS
Description	Major class
List Type	List of Values
Security Type	Non-Hierarchical Security
Format	Char
Max. Size	10
Uppercase Only (A–Z)	Check box to be selected
Right Justify and Zero-fill Numbers (001)	Check box to be deselected
Validation Type	Independent

- Save your work.

5. Create the dependent value set:

Field Name	Value
Value Set Name	XXPO_SUBCLASS
Description	Subclass
List Type	List of Values
Security Type	Non-Hierarchical Security
Format	Char
Maximum Size	10
Uppercase Only (A–Z)	Selected
Right Justify and Zero-fill Numbers (001)	Deselected
Validation Type	Dependent

6. (B) Edit information and enter the following information:

- Independent Value Set Name: XXPO\_CLASS
- Value: NONE
- Description: None

7. Save

## Solution: Creating Value Sets (Required)

### Creating a Value Set

1. Responsibility: System Administrator
2. Navigate to the Value Sets window:
  - (N) Application > Validation > Set
3. Enter values as follows:

Field Name	Value
Value Set Name	XXPO_CLASS
Description	Major class
List Type	List of Values
Security Type	Non-Hierarchical Security
Format	Char
Maximum Size	10
Uppercase Only (A-Z)	Selected
Right Justify and Zero-fill Numbers (001)	Deselected
Validation Type	Independent

The screenshot shows the 'Value Sets' window with the following details:

- Value Set Name:** XXPO\_CLASS
- Description:** Major Class
- List Type:** List of Values
- Security Type:** Non-Hierarchical Security
- Format Validation:**
  - Format Type:** Char
  - Maximum Size:** 10
  - Precision:** (empty field)
  - Checkboxes:**
 Numbers Only (0-9)  
 Uppercase Only (A-Z)  
 Right-justify and Zero-fill Numbers (0001)
  - Min Value:** (empty field)
  - Max Value:** (empty field)
- Value Validation:**
  - Validation Type:** Independent
  - Edit Information:** button

4. Click Save.
5. (M) File > New. Enter values as follows:

Field Name	Value
Value Set Name	XXPO_SUBCLASS
Description	Subclass
List Type	List of Values
Security Type	Non-Hierarchical Security
Format	Char
Max. Size	10
Uppercase Only (A-Z)	Selected
Right Justify and Zero-fill Numbers (001)	Deselected
Validation Type	Dependent

The screenshot shows the 'Value Sets' configuration screen. The 'Value Set Name' is set to 'XXPO\_SUBCLASS'. The 'Description' is 'Subclass'. The 'List Type' is 'List of Values' and the 'Security Type' is 'Non-Hierarchical Security'. Under 'Format Validation', the 'Format Type' is 'Char', with 'Uppercase Only (A-Z)' selected. There are fields for 'Min Value' and 'Max Value'. Under 'Value Validation', the 'Validation Type' is 'Dependent'. There is also an 'Edit Information' button.

## 6. (B) Edit Information.

- **Name:** XXPO\_CLASS
- **Value:** NONE
- **Description:** None

Dependent Value Set Information

**Independent Value Set**

Name	XXPO_CLASS
Description	Major Class

**Dependent Default Value**

Value	NONE
Description	None

7. Click Save.
8. Close the form to return to the Navigator.

## Practice - Creating a Structure for a Key Flexfield and Adding Value Sets (Required)

---

### Overview

In this practice you will create a structure for a key flexfield.

### Assumptions

- Verify you are logged into the Oracle applications as XXEBSTUDENT.
- Replace XX with your terminal number or initials.
- You must have access to an Oracle Application Vision database, or comparable training, or test instance at your site on which to complete this practice.

### Tasks

#### Querying the Item Categories Structure

- Responsibility: System Administrator
- Navigate to the Key Flexfield Segments window:
  - (N) Application > Flexfield > Key > Segments
- Query the structure and enter following information:
  - Application: Inventory
  - Flexfield Title: Item Categories

#### Creating a New Structure

- Create a new structure:

Field	Value
Code	XXPO_ITEM_CATEGORY
Title	XXPO_ITEM_CATEGORY
Description	PO Item Category

#### Assigning Segments

- Create the structure based on the segment information in the following table:

No	Name	Window Prompt	Column (LOV)	Value Set (LOV)
1	PO Class	Class	SEGMENT1	XXPO_CLASS
2	PO Subclass	Subclass	SEGMENT2	XXPO_SUBCLAS S

- Specify segment information for the PO Class segment:

Field	Value
Description	PO Class

Required	Checked
Security Enabled	Checked

7. Specify segment information for the PO Subclass segment:

Field	Value
Description	PO Subclass
Required	Checked
Security Enabled	Checked

8. Freeze and compile the flexfield.

### Adding Values

9. Navigate to the Values window:

- (N) Application > Validation > Values

10. Search for any existing values using your value sets.

11. Enter values according to the following table and Save:

Value	Description
CCOMP	Computer Component
CSYS	Computer System

### Entering Values Dependent on the CCOMP Value

12. Query the PO Subclass segment of the XXPO\_ITEM\_CATEGORY structure.

13. Enter values dependent on the CCOMP value according to the following table and Save:

Value	Description
KEYBOARD	Keyboard, 101-Key
MOUSE	Mouse, Optical
MONITOR	Monitor, Flat Panel

### Entering Values Dependent on the CSYS Value

14. Enter values dependent on the CSYS value according to the following table and Save:

Value	Description
DESKTOP	Desktop
PC	PC
SERVER	Server

15. Close windows until you are back at the Navigator.

## Solution: Creating a Structure for a Key Flexfield (Required)

### Querying the Item Categories Structure

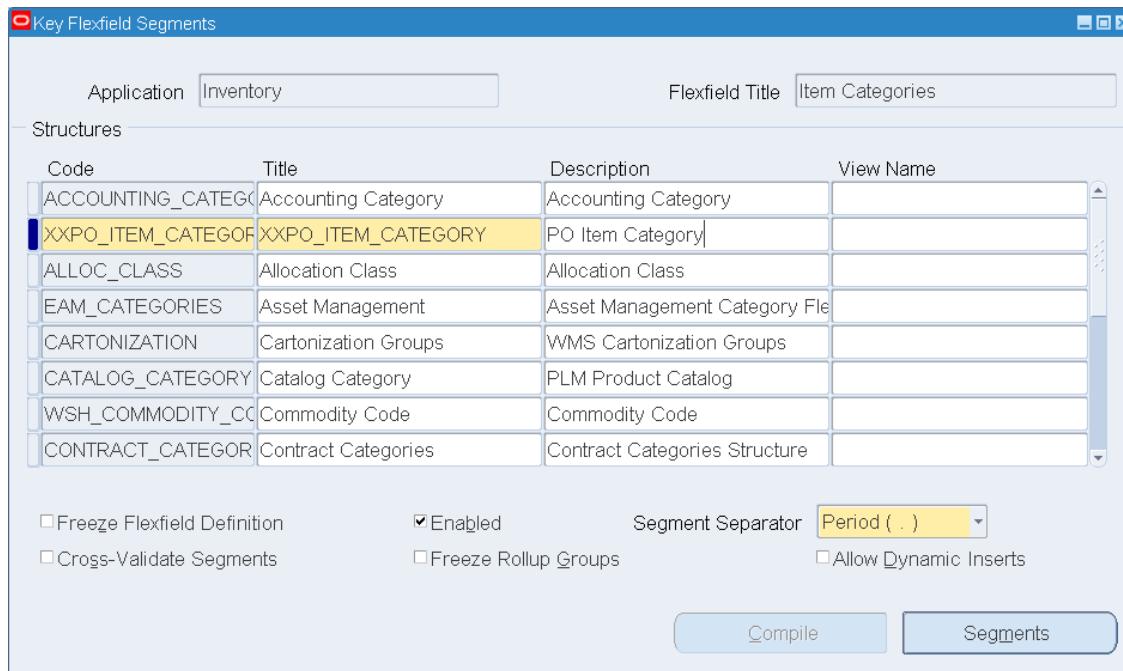
1. Responsibility: System Administrator
2. Navigate to the Key Flexfield Segments window:
  - (N) Application > Flexfield > Key > Segments
3. (M) View > Query By Example > Enter
  - Application: Inventory
  - Flexfield Title: Item Categories
4. (M) View > Query By Example > Run

### Creating a New Structure

5. Place cursor in the Title field (in the Structures region):
  - (M) File > New
  - Enter the following information:

Field	Value
Code	XXPO_ITEM_CATEGORY
Title	XXPO_ITEM_CATEGORY
Description	PO Item Category

- Save



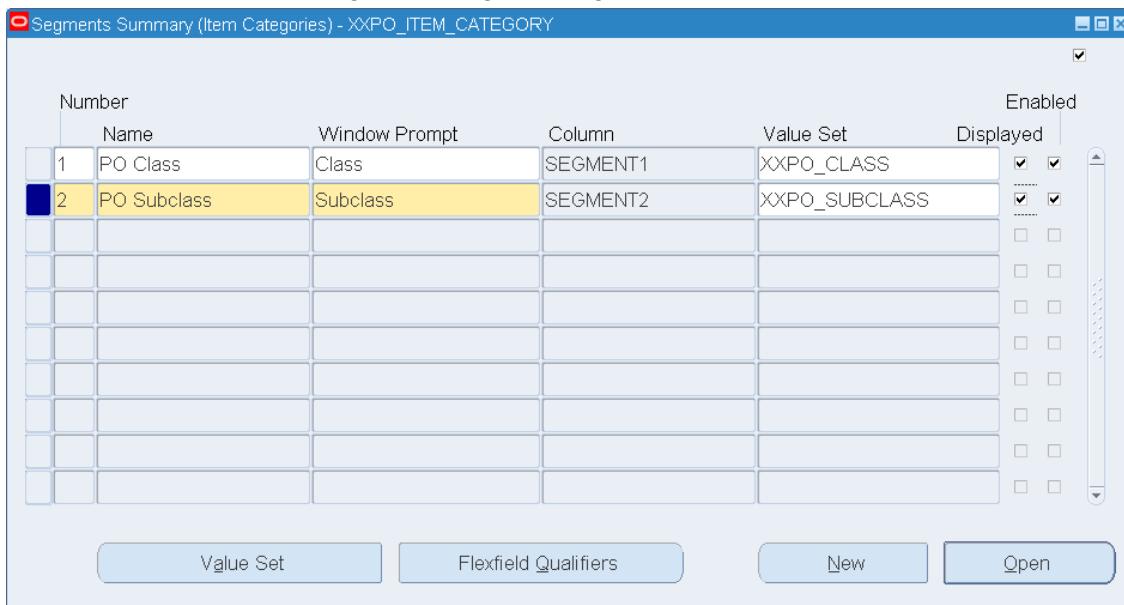
### Assigning Segments

6. (B) Segments
    - Create the structure based on the segment information in the following table:
- Note: Be sure to Save Independent Segment before adding the Dependent Segment.

Copyright © 2010, Oracle and/or its affiliates. All rights reserved.

No	Name	Window Prompt	Column (LOV)	Value Set (LOV)
1	PO Class	Class	SEGMENT1	XXPO_CLASS
2	PO Subclass	Subclass	SEGMENT2	XXPO_SUBCLAS S

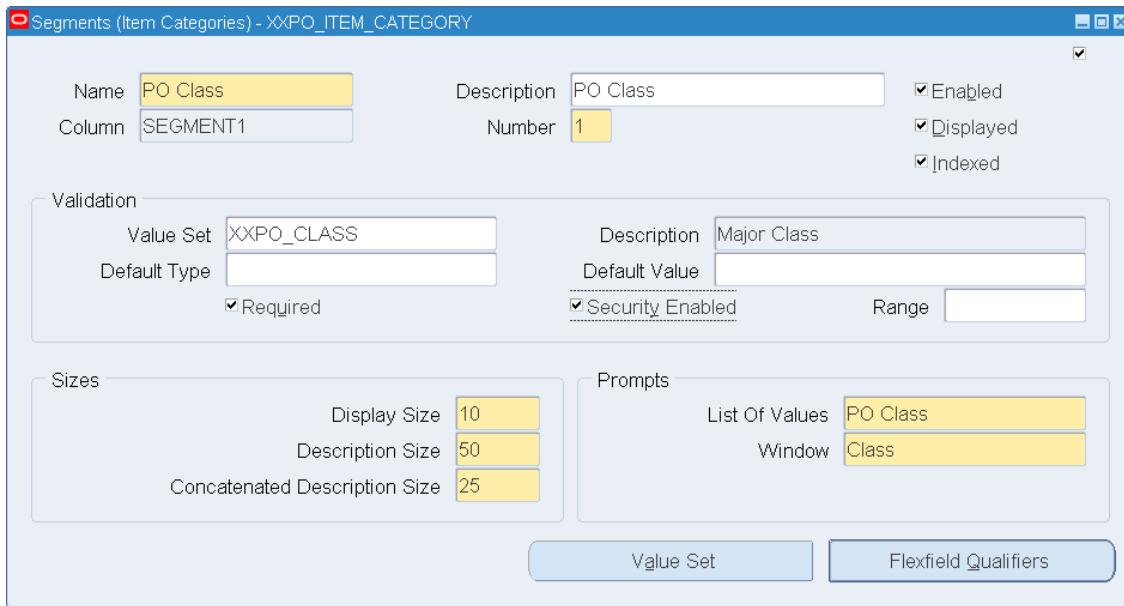
- Save.
  - Click (B) OK to acknowledge Warning message.



7. Place your cursor on line 1 (PO Class).
    - Click (B) Open to open Segments detail window to add additional information to the segment definition.

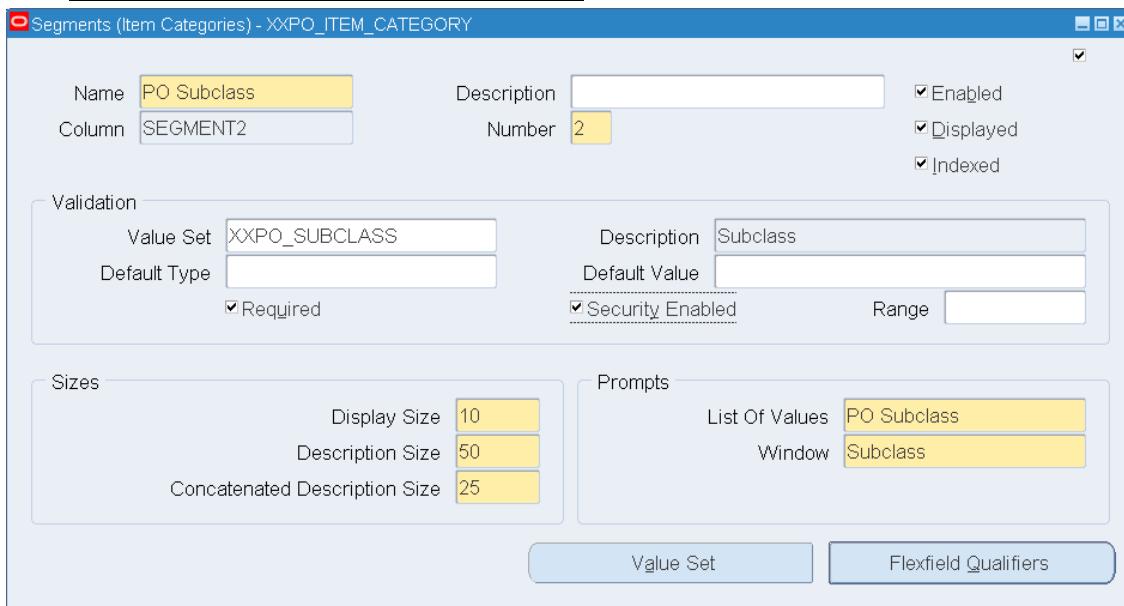
Field	Value
Description	PO Class
Required	Checked
Security Enabled	Checked

- Save.



- Close the Segments window.
8. Place your cursor on line 2 (PO Subclass).
- Click (B) Open to open Segment detail window to add additional information to the segment definition.

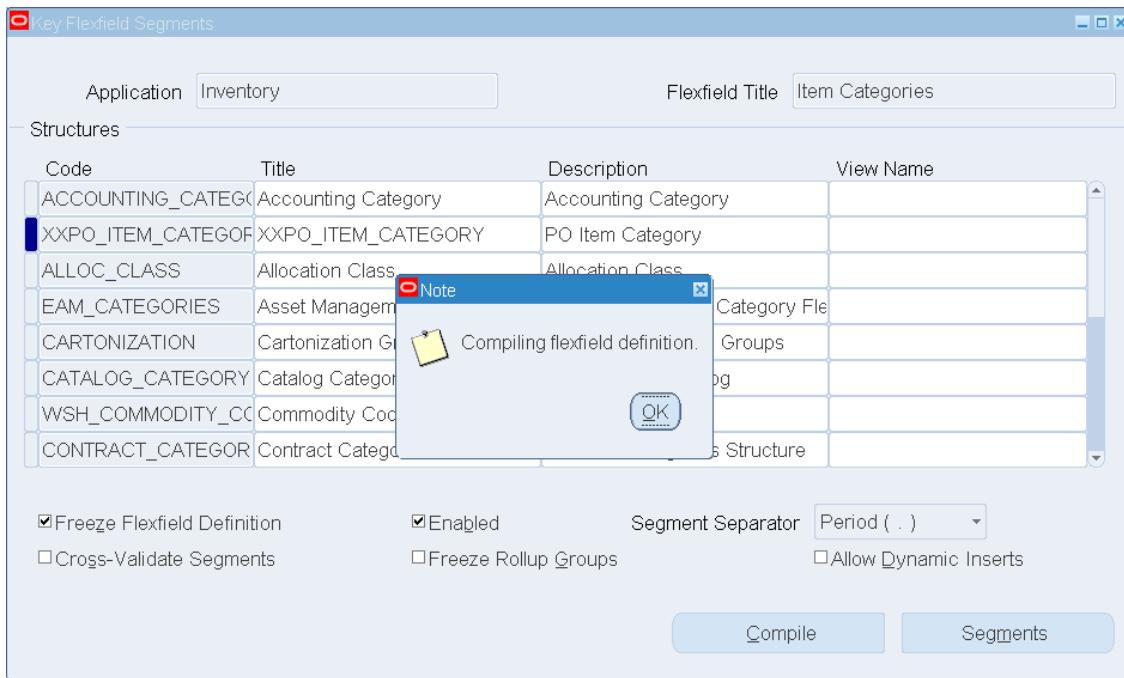
Field	Value
Description	PO Subclass
Required	Checked
Security Enabled	Checked



- Save.

9. Close Segment detail and summary windows to return to the Key Flexfield Segments window.

- Select the Freeze Flexfield Definition check box.
- (B) OK
- (B) Compile
- (B) OK



- Click (B) OK to acknowledge the Note dialog box.
- Close all windows to return to the Navigator.

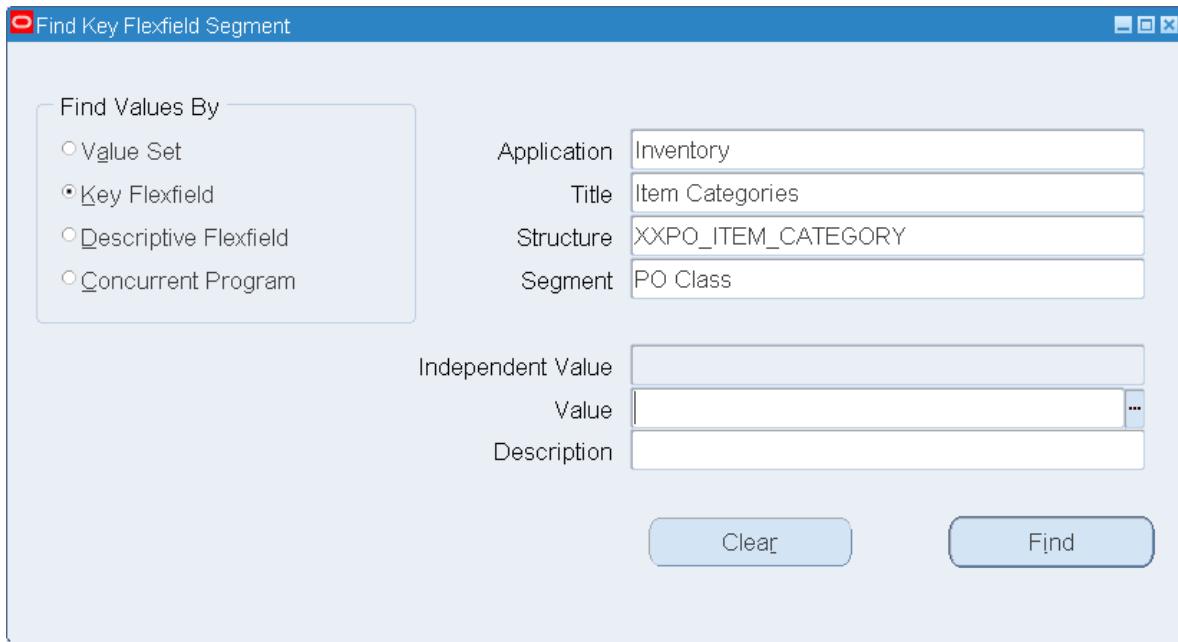
### Adding Values

10. Navigate to the Values window.

- (N) Application > Validation > Values

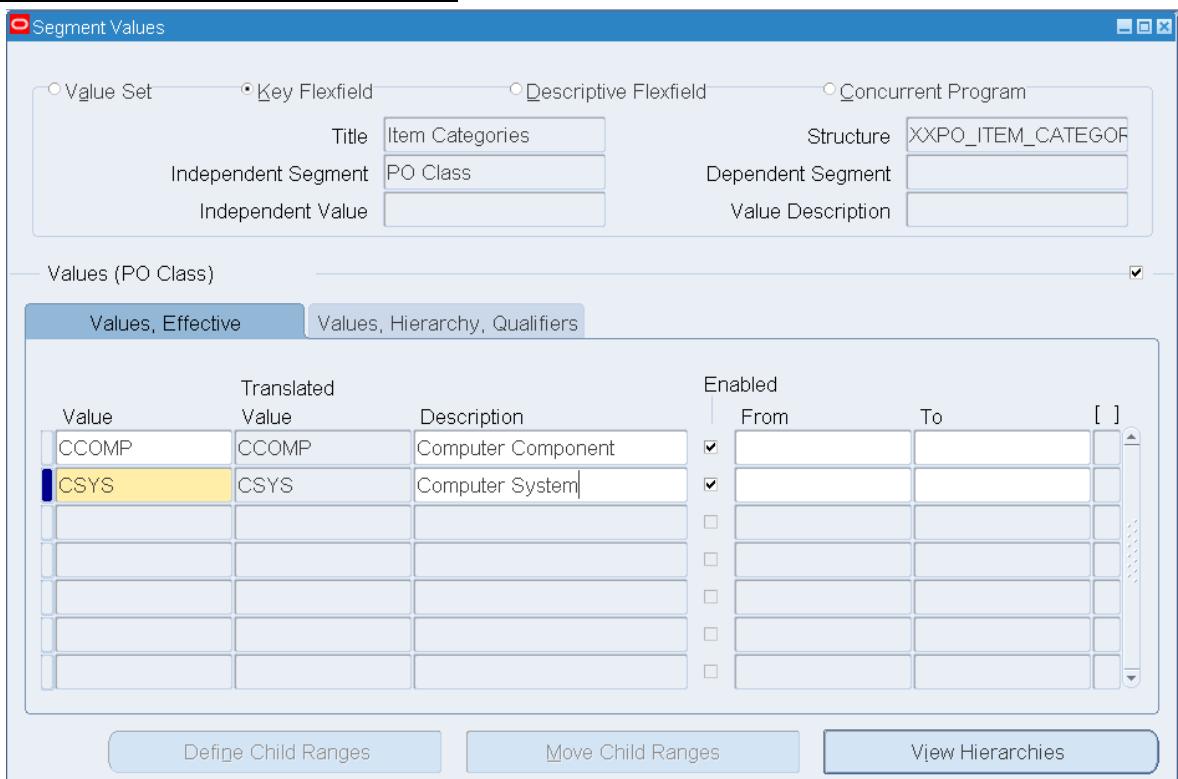
11. Search for any existing values using your value sets:

- Find Values By: Key Flexfield
- Application: Inventory
- Title: Item Categories
- Structure: XXPO\_ITEM\_CATEGORY
- Segment: PO Class
- (B) Find



12. Enter values according to the following table:

Value	Description
CCOMP	Computer Component
CSYS	Computer System



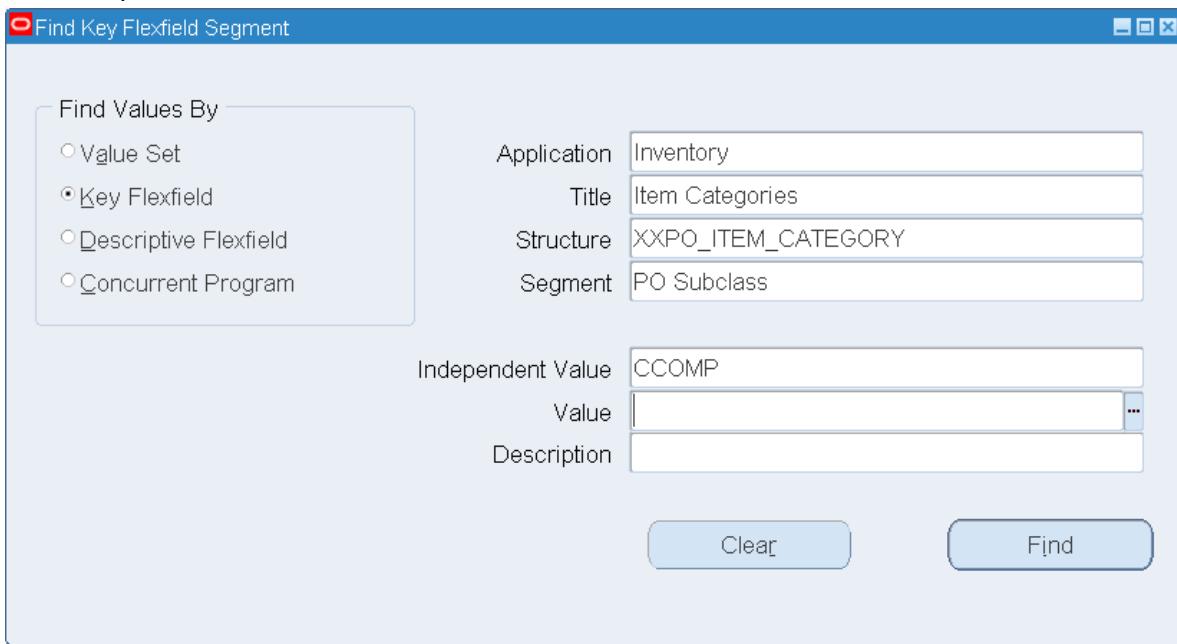
- Save.

- Place your cursor in the Title field.

### Entering Values Dependent on the CCOMP Value

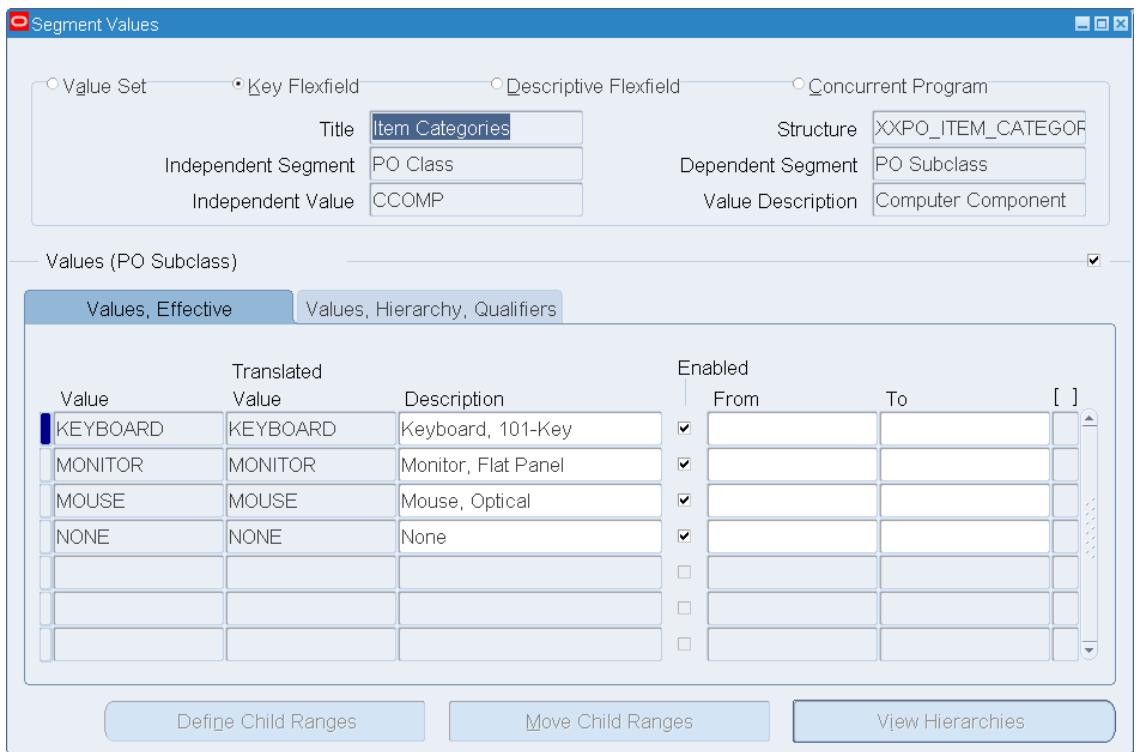
#### 13. (M) View > Find

- Find your value sets:
  - Find Values By: Key Flexfield
  - Application: Inventory
  - Title: Item Categories
  - Structure: XXPO\_ITEM\_CATEGORY
  - Segment: PO Subclass
  - Independent Value: CCOMP



- Click (B) Find
- Enter values according to the following table:

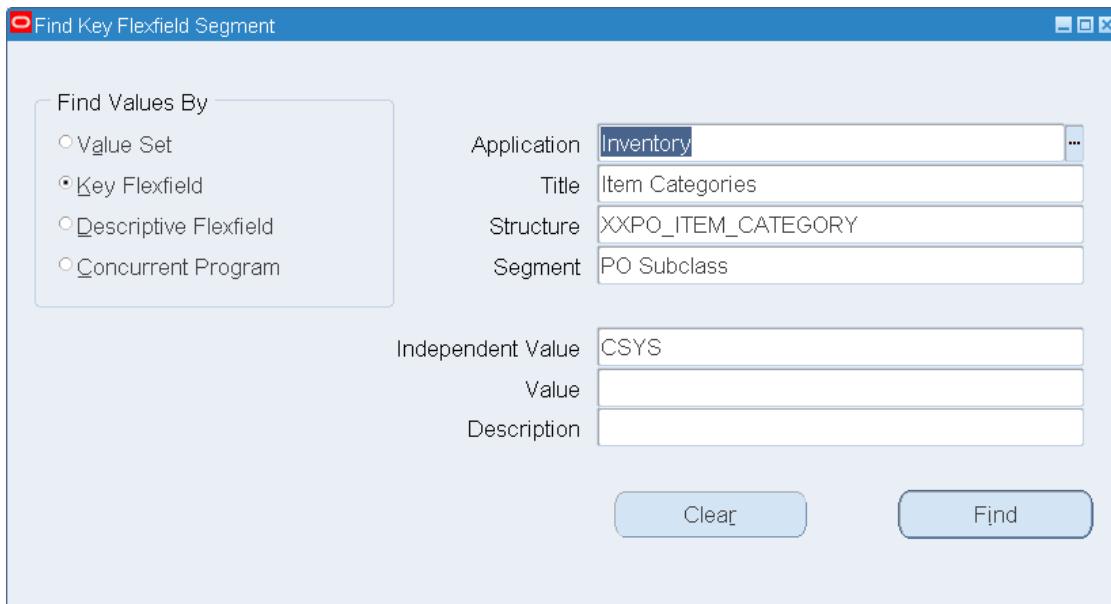
Value	Description
KEYBOARD	Keyboard, 101-Key
MOUSE	Mouse, Optical
MONITOR	Monitor, Flat Panel



- Save.
  - Place your cursor in the Title field

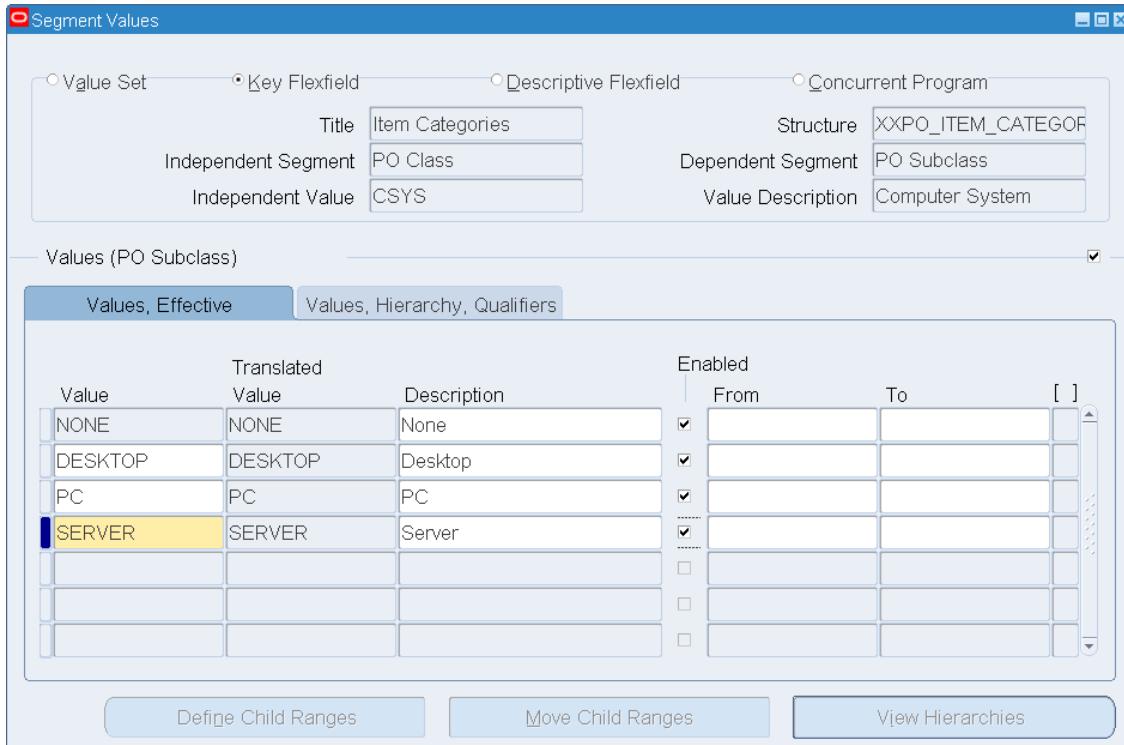
## Entering Values Dependent on the CSYS Value

14. (M) View > Find to Open Find Key Flexfield Segment window  
– Change Independent Value to CSYS



- Click (B) Find
  - Enter values according to the following table:

Value	Description
DESKTOP	Desktop
PC	PC
SERVER	Server



- Save.
  - Close the Segment Values window.
  - Click (B) OK to acknowledge the Note dialog box.

15. Verify you have returned to the Navigator.

## Practice - Testing the Flexfield (Required)

---

### Overview

Test the flexfield. Because there is no dynamic insertion available for this flexfield, all valid code combinations must be defined prior to being used. Some key flexfields can take advantage of dynamic insertion to create combinations on the fly if dynamic insertion is enabled. If dynamic insertion is not enabled, code combinations must be created prior to using them.

### Assumptions

- Verify you are logged into the Oracle applications as XXEBSTUDENT.
- Replace XX with your terminal number or initials.
- You must have access to an Oracle Application Vision database, or comparable training, or test instance at your site on which to complete this practice.

### Tasks

#### Defining Valid Category Combinations

1. Responsibility: Inventory, Vision Operations (USA)
2. Navigate to the Category Codes window:
  - (N) Setup > Items > Categories > Category Codes
3. Set up new category codes combinations according to the following table. Select your structure XXPO\_ITEM\_CATEGORY.

Structure Name	Category	Description
XXPO_ITEM_CATEGORY	CCOMP.KEYBOARD	Component, Keyboard
XXPO_ITEM_CATEGORY	CSYS.PC	System, PC

#### Setting Up Category Sets

4. Navigate to the Category Sets window:
  - (N) Setup > Items > Categories > Category Sets (M1 - Seattle)
5. Set up category codes:
  - Name: XXPurchasing
  - Description: Purchasing Category Set
  - Flex Structure: XXPO\_ITEM\_CATEGORY
  - Controlled At: Master Level
  - Default Category: CSYS.PC
  - Click Save.
6. Test the independent/dependent relationship by placing the cursor in the Default Category field.
7. Close windows until you are back at the Navigator.

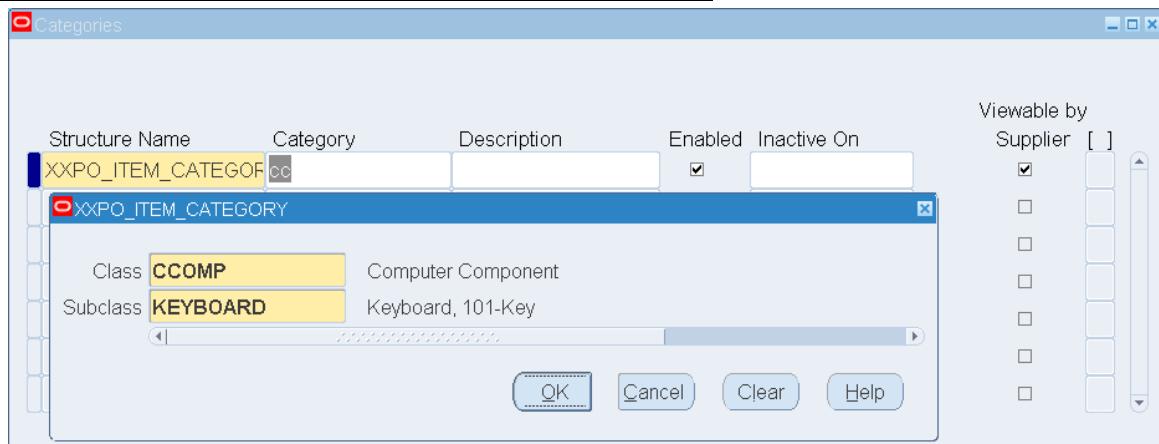
## Solution: Testing the Flexfield (Required)

### Defining Valid Category Combinations

1. Responsibility: Inventory, Vision Operations
2. Navigate to the Category Codes window:
  - (N) Setup > Items > Categories > Category Codes
  - (B) New

**Note:** Sometimes the Key Flexfield segments may not come automatically. In such cases, enter some letter in the Category field and press [Tab] to open the structure.
3. Define Category Code for CCOMP.KEYBOARD
  - Select your XXPO\_ITEM\_CATEGORY Structure Name
  - In the Category field, enter a partial value (e.g., CC), press tab to open the Flexfield Entry window and enter the following:

Field	Value
Class	CCOMP
Subclass	KEYBOARD



- Click (B) OK
  - Description: Component, Keyboard
4. Define Category Code for CSYS.PC
    - Select your XXPO\_ITEM\_CATEGORY Structure Name
    - In the Category field, enter a partial value (e.g., CS), press tab to open the Flexfield Entry window and enter the following:

Field	Value
Class	CSYS
Subclass	PC

- Click (B) OK
- Description: System, PC

The screenshot shows the 'Categories' window with the following data:

Structure Name	Category	Description	Enabled	Inactive On	Viewable by Supplier [ ]
XXPO_ITEM_CATEGORY	CCOMP.KEYBOARD	Component, Keyboard	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
XXPO_ITEM_CATEGORY	CSYS.PC	System, PC	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
			<input type="checkbox"/>		<input type="checkbox"/>
			<input type="checkbox"/>		<input type="checkbox"/>
			<input type="checkbox"/>		<input type="checkbox"/>

5. Click Save.
6. Close windows to return to the Navigator.

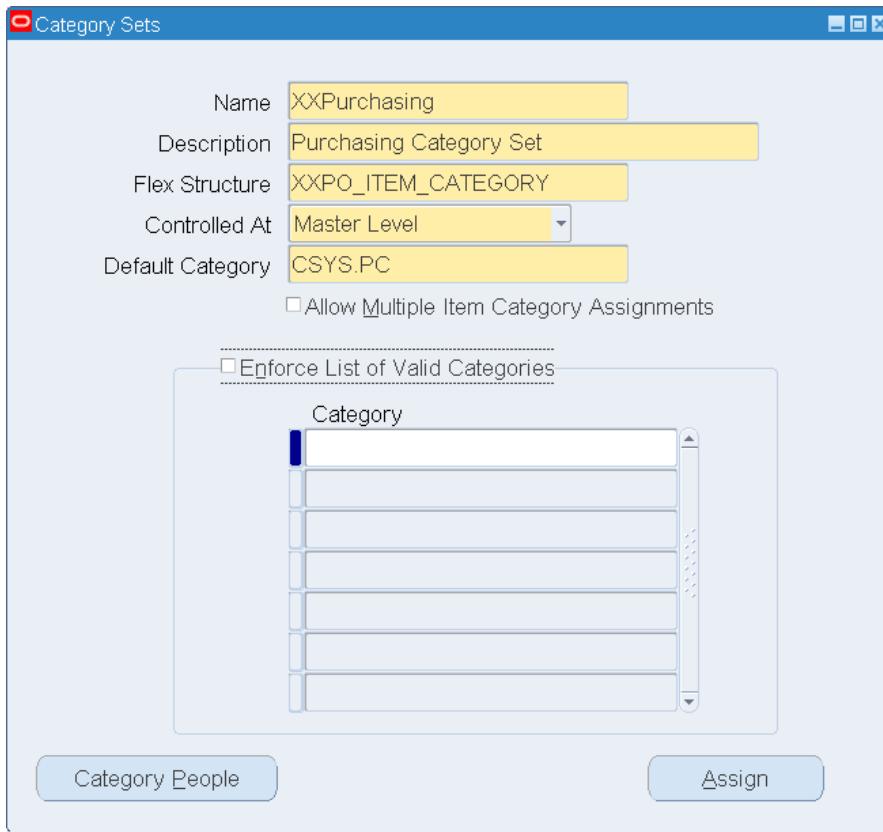
### Setting Up Category Sets

7. Navigate to the Category Sets window:
  - (N) Setup > Items > Categories > Category Sets (M1 – Seattle Manufacturing)
  - Select M1 – Seattle Manufacturing from the list.
  - (B) OK
8. Create category code combinations by entering the following:

Field	Value
Name:	XXPurchasing
Description:	Purchasing Category Set
Flex Structure:	XXPO_ITEM_CATEGORY
Controlled At:	Master Level
Default Category:	Invoke List of Values
Class:	CSYS (LOV)
Subclass:	PC (LOV)

- (B) OK
- Click Save.

Note the subclass values are dependent on the independent class value of CSYS.



Optionally: Test the independent/dependent relationship by placing cursor in the Default Category field and select a different code combination.

9. Close windows to return to the Navigator.

## Practice - Defining a Descriptive Flexfield with Context-Sensitive Segment (Required)

---

### Overview

In this practice, you will set up global, context-sensitive segments and create a table-validated value set. By using context sensitivity, you can increase the number of questions you can ask without increasing the number of columns in the table. In this scenario, you will track the store name plus additional information for a payment based on the type of payment that has been processed. If the payment uses the credit card context, you require both a credit card number and the expiry date. If the payment uses the finance context, you require the payment terms. To avoid some repetitive data entry, you will use a table that already exists within Oracle Applications to validate any payment terms used in the finance context. Finally, if the payment has been made using the cheque context, you require the cheque number.

### Assumptions

- Verify you are logged into the Oracle applications as XXEBSTUDENT.
- Replace XX with your terminal number or initials.
- You must have access to an Oracle Application Vision database, or comparable training, or test instance at your site on which to complete this practice.

### Tasks

To perform this practice, you will need a descriptive flexfield to work on. As we can only create one segment structure per descriptive Flexfield, your instructor will assign you a descriptive flexfield that has not yet been used in the database you are accessing. You will use the assigned flexfield throughout this practice. The list below assigns each team number a unique descriptive flexfield and shows the navigation path to the flexfield. The paths for teams 01 to 16 start from the General Ledger, Vision Operations (USA) responsibility. Your instructor will tell you which flexfield you are to define.

Team: 01

Descriptive Flexfield Title: Journal Sources

Navigation Path: Setup > Journal > Sources

Team: 02

Descriptive Flexfield Title: AutoPost Criteria

Navigation Path: Setup > Journal > AutoPost

Team: 03

Descriptive Flexfield Title: Budgetary Control Group: Rules

Navigation Path: Budgets > Define > Controls (Budgetary Control Rules region)

Team: 04

Descriptive Flexfield Title: Conversion Rate Types

Navigation Path: Setup > Currencies > Rates > Types

Team: 05

Descriptive Flexfield Title: Define Budget Organization: Organization

Navigation Path: Budgets > Define > Organization

Team: 06

Descriptive Flexfield Title: Define Recurring Journal: Batch

Navigation Path: Journals > Define > Recurring

Team: 07

Descriptive Flexfield Title: Journal Categories

Navigation Path: Setup > Journal > Categories

Team: 08

Descriptive Flexfield Title: Accounting Calendar: Periods

Navigation Path: Setup > Financials > Calendars > Accounting (Periods region)

Team: 09

Descriptive Flexfield Title: Open and Close Periods

Navigation Path: Setup > Open/Close

Team: 10

Descriptive Flexfield Title: Daily Rates

Navigation Path: Setup > Currencies > Rates > Daily

Team: 11

Descriptive Flexfield Title: Period Types

Navigation Path: Setup > Financials > Calendars > Types

Team: 12

Descriptive Flexfield Title: Summary Accounts

Navigation Path: Setup > Accounts > Summary

Team: 13

Descriptive Flexfield Title: Suspense Accounts

Navigation Path: Setup > Accounts > Suspense

Team: 14

Descriptive Flexfield Title: Define Budget

Navigation Path: Budgets > Define > Budgets

Team: 15

Descriptive Flexfield Title: Ledger Sets

Navigation Path: Setup > Financials > Ledger Sets

Team: 16

Descriptive Flexfield Title: AutoReversal Criteria

Navigation Path: Setup > Journal > AutoReverse

The following two descriptive flexfields can be accessed through the General Ledger, Vision Operations (USA) responsibility, but are owned by Application Object Library.

Team: 17

Descriptive Flexfield Title: Sequence Assignments

Navigation Path: Setup > Financials > Sequences > Document > Assign

Team: 18

Descriptive Flexfield Title: Currencies

Navigation Path: Setup > Currencies > Define

The following two Inventory-owned descriptive flexfields can be accessed through the Inventory, Vision Operations (USA) responsibility.

Team: 19

Descriptive Flexfield Title: Kanban Cards

Navigation Path: Kanban > Kanban Cards

Team: 20

Descriptive Flexfield Title: Define Unit of Measure

Navigation Path: Setup > Units of Measure > Units of Measure

**Note:** In this practice, the descriptive flexfield as assigned to Team 01 is shown.

### Define Your Value Sets

1. Use the Value Sets window to define value sets as follows:

- Define an independent value set named XX\_STORE. Give the value set a description, a format type of Char, and a maximum size of 10. Specify the values must use uppercase and do not enable security for the value set.
- Define a none validated value set named XX\_CARD\_NUM. Give the value set a description, a format type of Number, and a maximum size of 16. Specify the values do not use zero-padding and do not enable security for the value set.
- Define a none validated value set named XX\_EXPIRY. Give the value set a description, a format type of Char, and a maximum size of 4. Specify the values do use zero-padding and do not enable security for the value set.
- Define an none validated value set named XX\_CHEQUE\_NUM. Give the value set a description, a format type of Char, and a maximum size of 8. Specify the values must use zero-padding and do not security for the value set.
- Define a table-validated value set named XX\_PAY\_TERMS. Give the value set a description, a format type of Char, and a maximum size of 15. Do not enable security for the value set. Specify RA\_TERMS\_TL in the Receivables application as the

validation table. In the “Table Columns” block, assign the column name NAME in the Value field and select the default type of Varchar2 and Size 15. Assign the column name DESCRIPTION in the ID field, choose the type of Number and Size 240, and click Save.

### Define Your Structure

2. After defining your value sets, use the Descriptive Flexfield Segments window to define the structure for your descriptive flexfield. For the purpose of this practice, use the same descriptive flexfield that you have been previously assigned to enter your new structure.
3. For the context field, enter the Payment Type? prompt. Specify that a value is required and that the context should be displayed.
4. For the Global Data Elements context, define one new segment:
  - Define a segment named Store, with a Store prompt. Assign the segment the number 10, the column ATTRIBUTE1, and the value set XX\_STORE.
5. Define and enable a new context named Credit Card with the code Card. Define two new segments for this context.
  - Define a segment named Card Number, with a prompt of card Number. Assign the segment the number 10, the column ATTRIBUTE2, and the value set XX\_CARD\_NUM.
  - Define a segment named Expiry, with a prompt of Exp. Assign the segment the number 20, the column ATTRIBUTE3, and the value set XX\_EXPIRY.
  - Ensure that both segments are displayed and enabled.
6. Define and enable a new context named Cheque with the code Cheque. Define one new segment for this context.
  - Define a segment named Cheque Number, with a prompt of card Cheque Number. Assign the segment the number 10, the column ATTRIBUTE2, and the value set XX\_CHEQUE\_NUM.
  - Ensure that the segment is displayed and enabled.
7. Define and enable a new context named Finance with the code Finance. Define one new segment for this context.
  - Define a segment named Pay Terms, with a prompt of card Pay Terms. Assign the segment the number 10, the column ATTRIBUTE2, and the value set XX\_PAY\_TERMS.
  - Ensure that the segment is displayed and enabled.
8. When you finish defining the structure, freeze and compile your flexfield definition.

### Define Your Values

9. After defining the value sets and segments for your flexfield, use the Segment Values window to define the values associated with your independent value set.
10. Define and enable the following values for the XX\_STORE value set.

Value	Description
LONDON	Oxford St, London
ROME	Via Condotti, Rome
NEW YORK	5 <sup>th</sup> Avenue, New York
TOKYA	Ginza, Tokyo

### Test Your Descriptive Flexfield

11. After defining your value sets, segments, and values, navigate to your descriptive flexfield and test the results of your work. When you are finished, exit without saving.

## Solution: Defining a DFF with a Context-Sensitive Segment

### Define Your Value Sets

1. Responsibility: System Administrator  
(N) Application > Validation > Set
2. Enter the information for the first value set in the following fields:

Field	Value
Value Set Name	XX_STORE
Description	XX Store Value Set
Security Type	No Security
Format Type	Char
Maximum Size	10
Uppercase Only (A-Z)	Checked
Validation Type	Independent

Value Sets

Value Set Name: XX\_STORE

Description: XX Store Value Set

List Type: List of Values      Security Type: No Security

Format Validation

Format Type: Char      Maximum Size: 10      Precision:

Numbers Only (0-9)  
 Uppercase Only (A-Z)  
 Right-justify and Zero-fill Numbers (0001)

Min Value:      Max Value:

Value Validation

Validation Type: Independent      Edit Information

3. Save your work.
4. Enter the information for the second value set in the following fields:
  - (M) File > New

Field	Value
Value Set Name	XX_CARD_NUM
Description	XX Credit Card Number
Security Type	No Security
Format Type	Char
Maximum Size	16

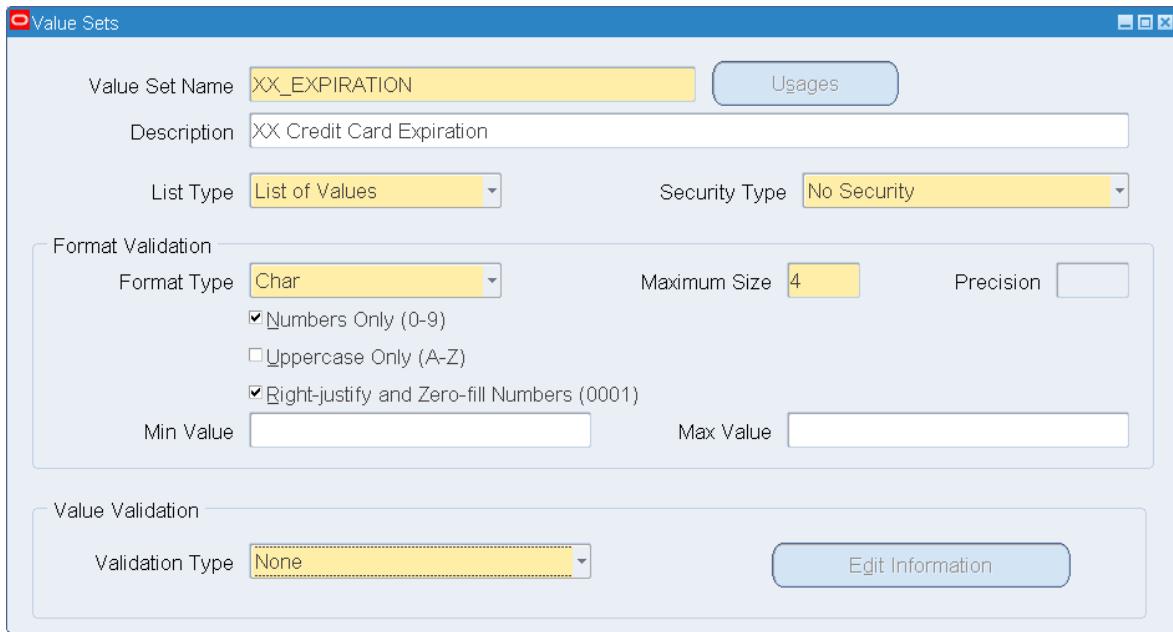
Field	Value
Numbers Only (0-9)	Checked
Validation Type	None

The screenshot shows the 'Value Sets' window with the following details:

- Value Set Name:** XX\_CARD\_NUM
- Description:** XX Credit Card Number
- List Type:** List of Values
- Security Type:** No Security
- Format Validation:**
  - Format Type: Char
  - Maximum Size: 16
  - Precision: (empty)
  - Checkboxes: Numbers Only (0-9) (checked), Uppercase Only (A-Z), Right-justify and Zero-fill Numbers (0001)
  - Min Value: (empty)
  - Max Value: (empty)
- Value Validation:**
  - Validation Type: None
  - Edit Information button

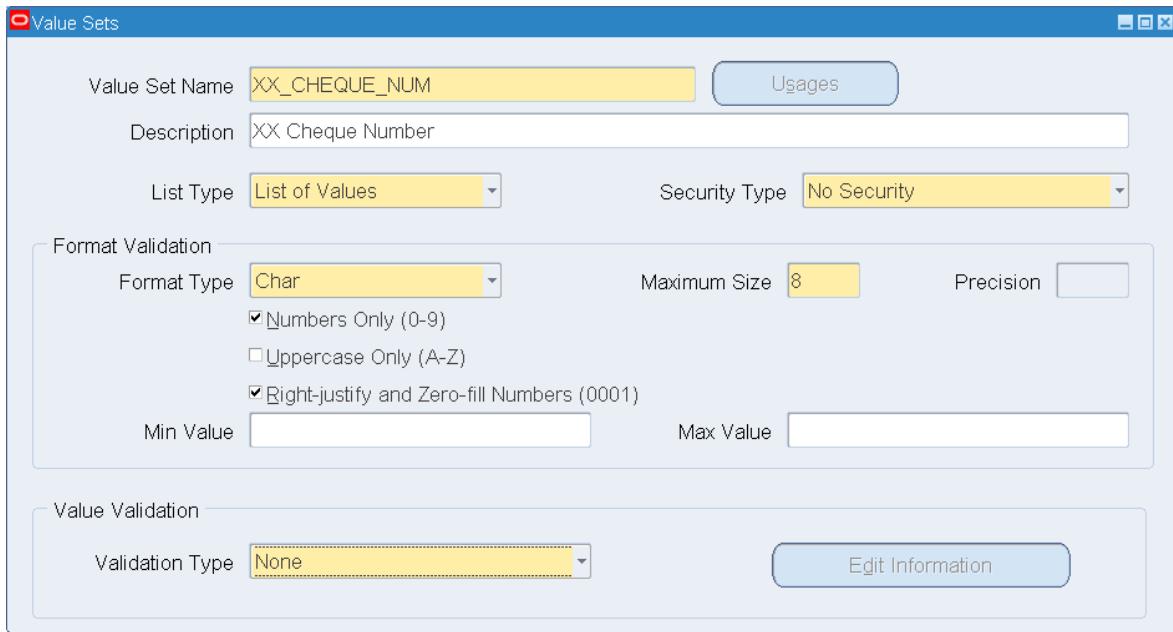
5. Save your work.
6. Enter the information for the third value set in the following fields:
  - (M) File > New

Field	Value
Value Set Name	XX_EXPIRATION
Description	XX Credit Card Expiration
Security Type	No Security
Format Type	Char
Maximum Size	4
Numbers Only	Checked
Right justify and Zero-fill Numbers	Checked
Validation Type	None



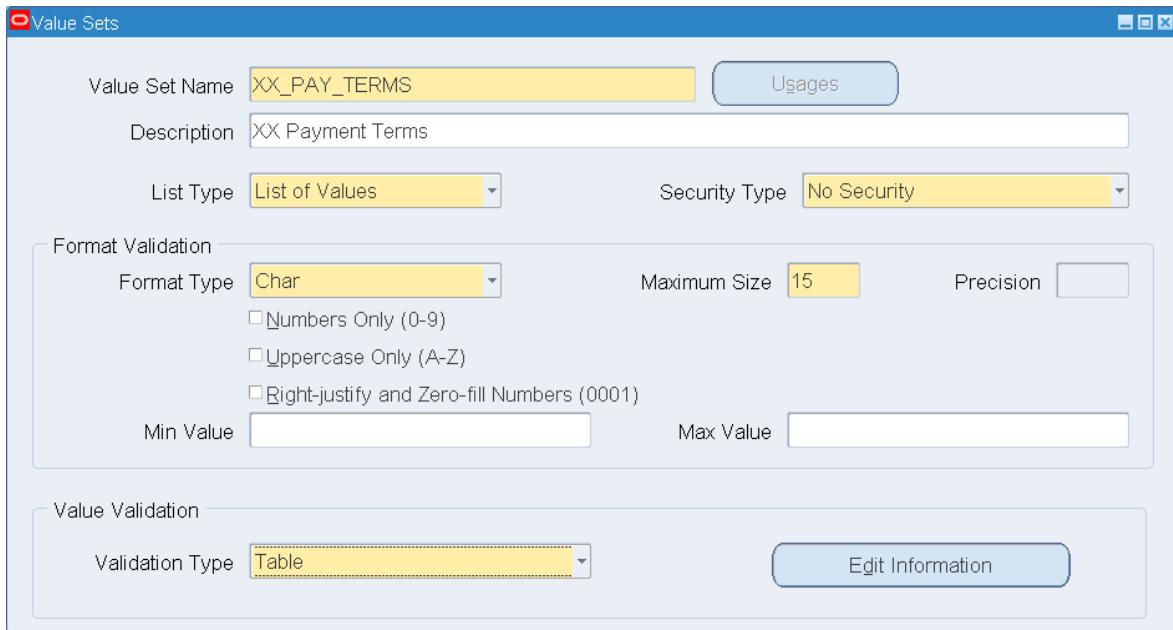
7. Save your work.
8. Enter the information for the fourth value set in the following fields:
  - (M) File > New

Field	Value
Value Set Name	XX_CHEQUE_NUM
Description	XX Cheque Number
Security Type	No Security
Format Type	Char
Maximum Size	8
Numbers Only	Checked
Right justify and Zero-fill Numbers	Checked
Validation Type	None



9. Save your work.
10. Enter the information for the final value set in the following fields:
  - (M) File > New

Field	Value
Value Set Name	XX_PAY_TERMS
Description	XX Payment Terms
Security Type	No Security
Format Type	Char
Maximum Size	15
Validation Type	Table

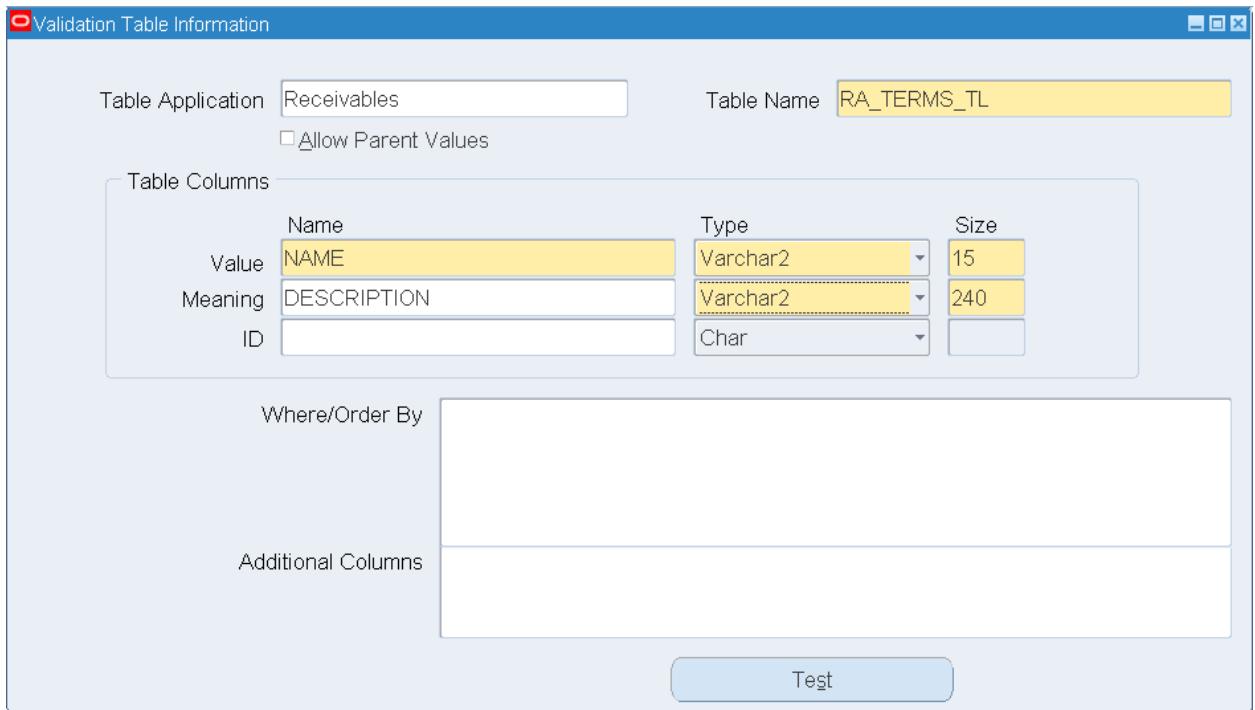


11. Click (B) Edit Information

Field	Value
Table Application	Receivables
Table Name	RA_TERMS_TL

12. In the Table Columns region, enter the following information:

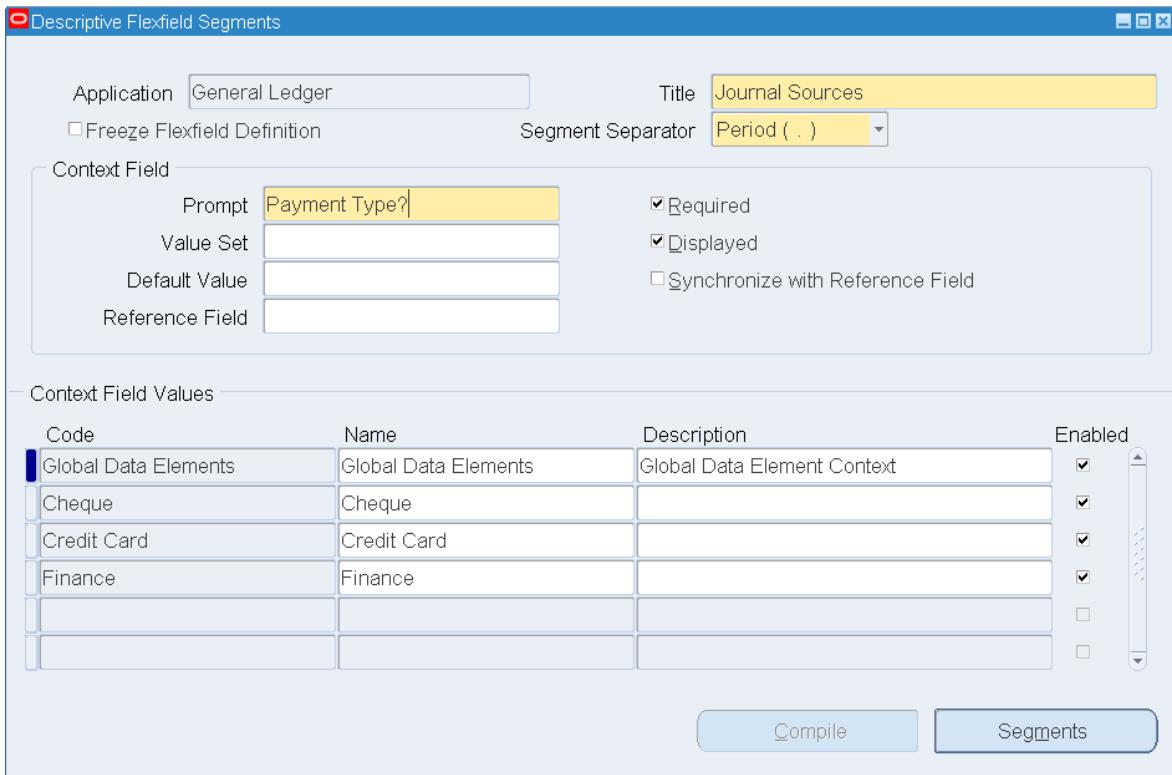
Field	Name	Type	Size
Value	NAME (LOV)	VarChar2 (defaults)	15 (defaults)
Meaning	DESCRIPTION (LOV)	VarChar2 (defaults)	240 (defaults)



- Click (B) Test  
**Note:** If the Table values are setup correctly, the test of the value set should be completed successfully. Otherwise it will show an error.
  - Click (B) OK
13. Save your work.
  14. Close all windows to return to Navigator

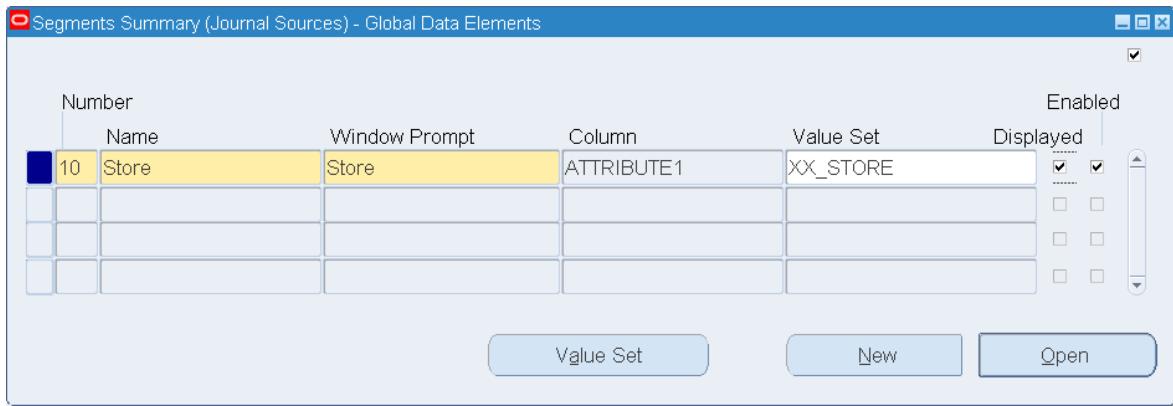
### Define Your Structure

15. (N) Application > Flexfield > Descriptive > Segments.
16. Use the Find icon from the Toolbar or Query the descriptive flexfield assigned to you. For example:
  - Application: General Ledger
  - Title: Journal Sources
 Note: Verify Freeze Flexfield Definition is unchecked. If checked, be sure to uncheck it otherwise you will not be able to continue.
17. In the Context Field region, enter information in the following fields:
  - Prompt: Payment Type?
  - Required: Checked
  - Displayed: Checked
18. In the Context Field Values Region, add three new contexts:
  - Cheque
  - Credit Card
  - Finance



19. In the Context Field Values region, select the Global Data Elements context and click (B) Segments to navigate to the Segments Summary window.
20. Enter the information for the first segment in the following fields:

Field	Value
Number	10
Name	Store
Window Prompt	Store
Column	ATTRIBUTE1
Value Set	XX_STORE
Displayed	Checked
Enabled	Checked

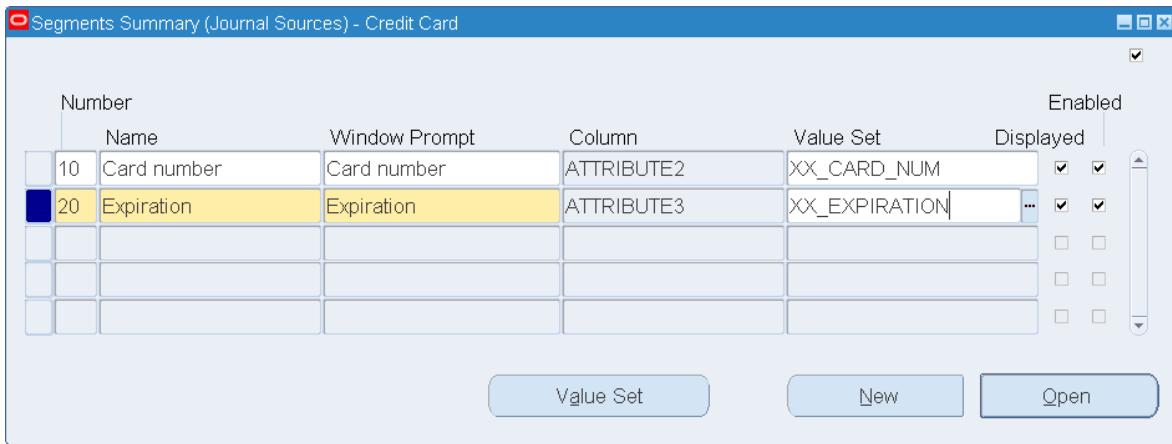


21. Save your work.
22. Navigate back to the main Descriptive Flexfield Segments window.
23. In the Context Field Values region, select the Credit Card context:
  - (B) Segments, enter the information for the first segment in the following fields:

Field	Value
Number	10
Name	Card Number
Window Prompt	Card Number
Column	ATTRIBUTE2
Value Set	XX_CARD_NUM
Displayed	Checked
Enabled	Checked

24. Save your work.
25. Enter the information for the second segment in the following fields:

Field	Value
Number	20
Name	Expiration
Window Prompt	Expiration
Column	ATTRIBUTE3
Value Set	XX_EXPIRATION
Displayed	Checked
Enabled	Checked



26. Save your work.
  - Click (B) OK to acknowledge Warning message.
27. Navigate back to the main Descriptive Flexfield Segments window.
28. In the Context Field Values region, select the Cheque context:
  - (B) Segments, enter the information for the first segment in the following fields:

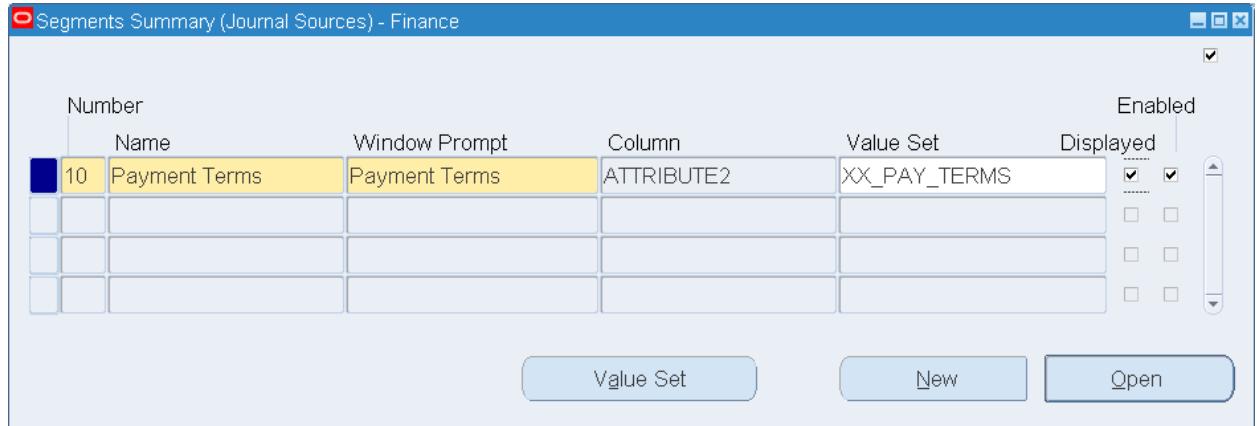
Field	Value
Number	10
Name	Cheque Number
Window Prompt	Cheque Number
Column	ATTRIBUTE2
Value Set	XX_CHEQUE_NUM
Displayed	Checked
Enabled	Checked

29. Save your work.
  - Click (B) OK to acknowledge Warning message.



30. Navigate back to the main Descriptive Flexfield Segments window.
31. In the Context Field Values region, select the Finance context:
  - Click (B) Segments, enter the information for the first segment in the following fields:

Field	Value
Number	10
Name	Payment Terms
Window Prompt	Payment Terms
Column	ATTRIBUTE2
Value Set	XX_PAY_TERMS
Displayed	Checked
Enabled	Checked



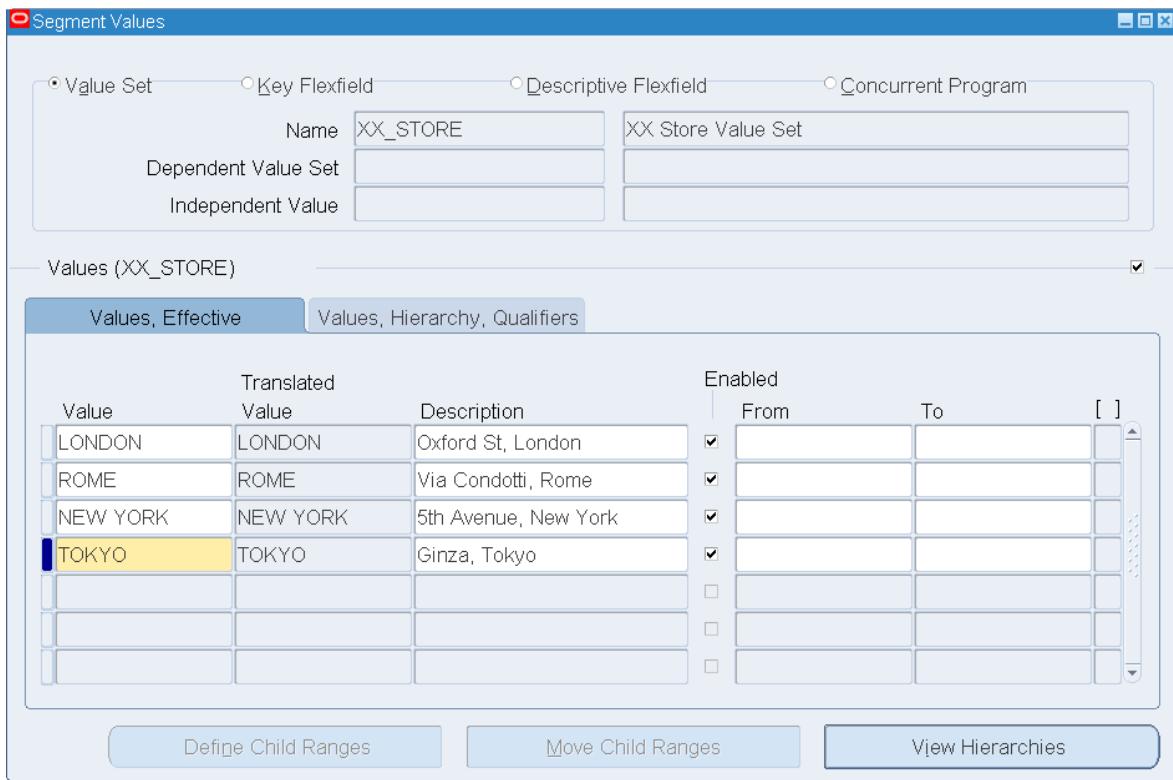
32. Save your work and Close the Segment Summary window.
33. Select the Freeze Flexfield Definition check box.
  - (B) OK (in the caution window)
  - (B) Compile (in the Descriptive Flexfield Segment window.)
  - (B) OK
  - (B) OK

### Define Your Values

34. Navigate to (N) Application > Validation > Values.
35. In the Find window, select Value Set and find the XX\_STORE value set.
  - Click (B) Find
36. In the Values, Effective region of the Segment Values window, define the following values:

Value	Description
LONDON	Oxford St, London
ROME	Via Condotti, Rome
NEW YORK	5 <sup>th</sup> Avenue, New York
TOKYO	Ginza, Tokyo

37. Save.



38. Close the Segment Values window
39. Click (B) OK to accept the note.

## Test Your Descriptive Flexfield

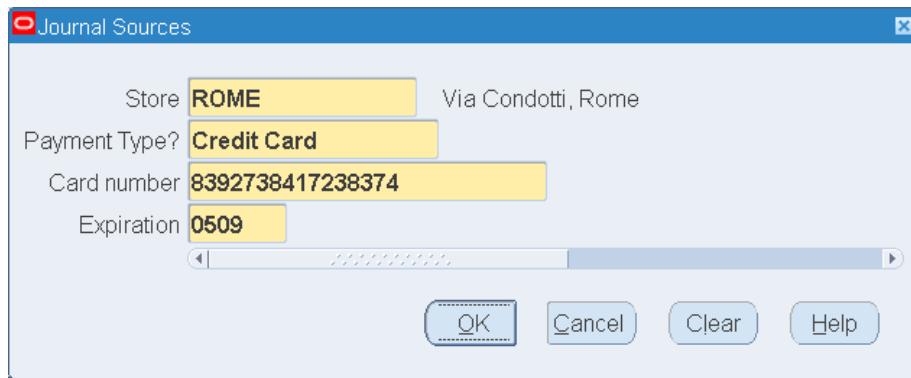
After defining your value sets, segments, and values, navigate to your assigned descriptive flexfield and test the results of your work. For example:

40. Responsibility: General Ledger, Vision Operations (USA)
  - (N) Setup > Journal > Sources
41. Click below [ ] or [□]
42. Select a Store from the LOV
  - Click (B) OK.
43. Select the Cheque Payment Type from the LOV.
44. Cheque Number: 1234. Note that the value defaults to 00001234 once you exit the field.



45. Select the Credit Card Payment Type from the LOV.

**Note:** You are now required to enter two pieces of information: card number and expiration date. This illustrates context sensitive information in descriptive flexfield.



46. Exit without saving.

## Practice - Defining / Creating an Item (Required)

---

### Overview

In this practice, you will create an item in the Inventory, place the item on a Price List and use it in Order Management.

### Assumptions

- Verify you are logged into the Oracle applications as XXEBSTUDENT
- Replace XX with your terminal number or initials.

### Tasks

#### Defining / Creating an Item

1. Create a new item by entering the following information:

Field	Value
Item	XX_Item
Description	XX_Item
Template	Finished Goods

2. Assign the Item to an Organization (e.g., V1)

#### Adding Item to a Price List

3. Add XX\_Item to the Corporate price list and assign a unit price.

#### Create Sales Order with Item

4. Add the newly created item to a sales order.

## Solution: Defining / Creating an Item (Required)

### Defining / Creating an Item

Responsibility: Inventory, Vision Operations (USA)

1. Navigate to the Master Items Window.
  - (N) Items > Master Items
    - Select Organization: V1 – Vision Operations
    - (B) OK
2. Create a new item by entering the following information:

Field	Value
Item	XX_Item
Description	XX_Item

3. Copy from Template.
  - (M) Tools > Copy From
    - Select Template = Finished Good from LOV
    - (B) OK
    - (B) Apply
    - (B) Done
4. (I) Save to save the record.

The screenshot shows the 'Master Item (V1)' window. The 'Organization' field is set to 'V1 Vision Operations'. The 'Item' field contains 'XX\_Item'. The 'Description' field also contains 'XX\_Item'. In the 'Display Attributes' section, the 'All' radio button is selected. The 'Main' tab is active. The 'Unit of Measure' section shows 'Primary' set to 'Each'. The 'Conversions' section has 'Both' selected. The 'User Item Type' is 'Finished good' and 'Item Status' is 'Active'. A large text area for 'Long Description' is present at the bottom.

5. Select the Organization Assignment tab on the left hand side.

The screenshot shows the 'Master Item (V1)' window. The 'Organization Assignment' tab is selected. In the top left, 'Organization' is set to 'V1' and 'Vision Operations'. The 'Item' field contains 'XX\_Item'. The 'Description' field also contains 'XX\_Item'. On the right, there are three radio buttons for 'Display Attributes': 'Master' (unselected), 'Org' (unselected), and 'All' (selected). Below the tabs, there are several dropdowns and input fields for Unit of Measure settings: Primary (Each), Tracking (Primary), Pricing (Primary), Secondary, Defaulting, Deviation Factor + (0 %), and Deviation Factor - (0 %). To the right, 'User Item Type' is set to 'Finished good' and 'Item Status' is set to 'Active'.

6. Check Assigned checkbox to assign the item to M1 – Seattle Manufacturing.

The screenshot shows the 'Master Item (V1)' window with the 'Organization Assignment' table. The table lists various organizations and their assigned status. The row for 'M1 Seattle Manufacturing' has both the 'Primary' and 'Tracking' columns set to 'Each' and the 'Pricing' column set to 'Primary'. The 'Assigned' column for this row has a checked checkbox. Other rows show assignments for other organizations like V1, AU, B1, etc., with some having checked checkboxes in the 'Assigned' column and others not.

Org	Name	Unit of Measure			Assigned
		Primary	Tracking	Pricing	
M1	Seattle Manufacturing	Each	Primary	Primary	<input checked="" type="checkbox"/>
V1	Vision Operations	Each	Primary	Primary	<input type="checkbox"/>
AU	Vision Australia	Each	Primary	Primary	<input type="checkbox"/>
B1	Northwest Electronic Supply	Each	Primary	Primary	<input type="checkbox"/>
B2	Discount SuperStore-Atlanta	Each	Primary	Primary	<input type="checkbox"/>
CH	Vision Switzerland	Each	Primary	Primary	<input type="checkbox"/>
CO1	Vision Columbia	Each	Primary	Primary	<input type="checkbox"/>
CZ	Vision Czech	Each	Primary	Primary	<input type="checkbox"/>
D1	Singapore Distribution Center	Each	Primary	Primary	<input type="checkbox"/>
D2	Seattle Distribution Center	Each	Primary	Primary	<input type="checkbox"/>
DWH	Defective Warehouse	Each	Primary	Primary	<input type="checkbox"/>
E1	Vision Germany	Each	Primary	Primary	<input type="checkbox"/>
E10	Vision Hungary	Each	Primary	Primary	<input type="checkbox"/>

7. Save the record.  
 8. Close the Form  
   ▪ (M) File > Close Form

### Adding the Item to an Existing Price List

Responsibility: Oracle Pricing Manager, Global

9. Navigate to Price List Setup;  
 (N) Price Lists > Price List Setup  
 10. Query for the Price List 'Corporate' and add the newly created item XX\_Item.  
   ▪ Query for the existing 'Corporate' Price List.

- Place your cursor in the List Lines region.
- (I) New to insert a new record.

Product Context	Product Attribute	Product Value	Value
Item	Item Number	XX_Item	26

The screenshot shows the Oracle E-Business Suite interface for managing price lists. The main window title is "Advanced Pricing - Price Lists". The "Main" tab is selected, displaying fields for Name (Corporate), Description (Corporate Price List), Currency (USD), Effective Dates (01-JAN-1996), Freight Terms (Prepay & Add), and Comments. Below the main tab, the "List Lines" tab is selected, showing a grid of items with columns: Product Context, Product Attribute, Product Value, and Product Description. One row in the grid is highlighted with yellow, corresponding to the entry in the main tab's Product Value field. At the bottom right of the List Lines tab, there are buttons for "Price Breaks" and "Pricing Attributes".

- (I) Save

11. Close the form.

### Creating a Sales Order

Responsibility: Order Management Super User, Vision Operations (USA).

12. Navigate to the Sales Order form:
  - (N) Orders, Returns > Sales Orders
13. (T) Order Information
  - Customer Number: 1608

Sales Orders (Vision Operations) - [New]

**Order Information**

**Line Items**

**Default**

**Main**   **Others**

Customer	Business World	Order Number	
Customer Number	1608	Order Type	Mixed
Customer PO		Date Ordered	05-MAY-2009 12:59:15
Customer Contact		Price List	Corporate
Blanket Number		Salesperson	Sprague, Mr. Howard
Ship To Location	San Jose (OPS)	Status	
	2391 L Street	Currency	USD
	San Jose, CA, 95106, US	Subtotal	0.00
Bill To Location	San Jose (OPS)	Tax	0.00
	2391 L Street	Charges	0.00
		Total	0.00
	San Jose, CA, 95106, US		

[ ]

**14. (T) Line Items**

- Add Item to the Order:
    - Ordered Item: XX\_ Item (LOV)
    - Qty: 10

**15. (I) Save**

**Note:** the Order Number is populated in the Order Information tab above the order type field. You can use this and query the sales order created for later reference.

16. Close the form.

**Note:** An item defined in an Inventory application can be used in another application, e.g., Pricing whereby you add the item to a price list and Order Management where the item can be included on a sales order.

This shows that the Item entity is shared across applications.

## Guided Demonstration - Creating a Supplier in Payables and Accessing from Purchasing (Required)

---

### Create Supplier

1. Responsibility: Payables, Vision Operations (USA)
2. (N) Suppliers > Entry
3. (B) Create Supplier
4. Enter the following information:

Field	Value
Supplier Type	Standard supplier (defaults)
Organization Name	XX Supplier
Country of Origin	United States

- (B) Apply in the Create Supplier screen
  - Note the Supplier number \_\_\_\_\_ and Registry Number \_\_\_\_\_.
  - Click (L) Address Book on the Top Left Hand side
  - (B) Create
5. Enter the following information (for Address):

Field	Value
Country	United States (defaults)
Address Line 1	100 5 <sup>th</sup> Avenue
City	New York
County	New York
State	NY
Postal Code	10020
Address Name	XX SUPPLIER NY
Language	American English (select from list box)
Address Purpose	<input checked="" type="checkbox"/> Purchasing and <input checked="" type="checkbox"/> Payment

6. (B) Continue
  - Select the check box besides XX Supplier and Vision Operations
  - (B) Apply
7. Click (L) Quick Update on the Left Hand side.
  - Accept the default Ship To Location and Bill To Location, FOB, Country of Origin values.
8. (B) Save
9. Close the window.

### Create Purchase Order

10. Responsibility: Purchasing, Vision Operations (USA).
11. (N) Purchase Orders > Purchase Orders
12. Enter the following information:

Field	Value
Operating Unit	Vision Operations (LOV)
Type	Standard Purchase Order (defaults)
Supplier	XX Supplier (LOV)

13. Close the form without saving.

Therefore, it is seen that the “Suppliers” entity is shared across applications. It is defined in one application and accessed in another.

**Note:** Suppliers are part of the Trading Community Architecture.

### Demonstrate How an Entity Defined in the Forms-Based Interface can be Viewed in a Self Service Application

14. Responsibility: Purchasing, Vision Operations (USA).
15. Navigate to the Requisitions Window.
  - (N) Requisitions > Requisitions
16. Enter the following information:

Field	Value
Operating Unit	Vision Operations (defaults)
Type	Purchase Requisition (defaults)
Description	Test for SSA

- (T) Lines

Field	Value
Item	AS54999 (LOV)
Quantity	10
Need-By	Current Date +1 Day

- Below the Line level, select Supplier = XX Supplier (created above)
  - Select Site = XX SUPPLIER NY
  - Accept all other defaults.
17. Save
    - Write down the Requisition Number = \_\_\_\_\_
    - Close the Requisitions Form.
  18. Responsibility: *i*Procurement.
    - (T) Requisitions.

- The above created requisition is visible within the “My Requisitions” region with a status of Incomplete.
19. Close the window.

Therefore, it is seen that an entity (Requisition), which is defined in a Forms-Based Interface can be accessed through the Self Service Applications.

## **Practice - Creating a Customer in Receivables and Accessing it from Order Management and Inventory (Required)**

---

### **Overview**

In this practice, you will create a customer in Receivables and access / use this customer in Order Management and Inventory.

### **Assumptions**

- Replace XX with your terminal number or initials.
- Verify you are logged into the Oracle applications as XXEBSTUDENT

### **Tasks**

#### **Creating a Customer**

Responsibility: Receivables, Vision Operations (USA)

1. Create a new customer by entering the following information:

Field	Value
Customer Type	Organization (retain default)
Customer Information Organization Name	XX Customer
Account Site Addresses Country	United States
Address Line 1	800 4 <sup>th</sup> Avenue, Suite 286
City	New York
County	New York
State	NY
Postal Code	10250
Address Description	XX CUSTOMER NY
Account Site Details Operating Unit	Vision Operations
Business Purposes Bill To	<input checked="" type="checkbox"/> Primary

2. Apply the changes.
  - Note down the Account Number: \_\_\_\_\_

#### **Access Customer in Order Management**

Responsibility: Order Management Super User, Vision Operations (USA).

3. Select XX Customer in the Sales Order form.
4. Close Form without saving.

## **Access Customer in Inventory**

Responsibility: Inventory, Vision Operations (USA)

5. Select XX Customer within the Customer Items form in Inventory.
6. Close Form without saving.

## **Solution: Creating a Customer in Receivables and Accessing from Order Management and Inventory (Required)**

---

### **Create a Customer**

Responsibility: Receivables, Vision Operations (USA)

1. Navigate to the Customers Web Page.
  - (N) Customers > Create/Maintain Customers
  - (B) Create
2. Enter the following information:

Field	Value
Customer Type	Organization (retain default)
Customer Information Organization Name	XX Customer
Account Site Addresses Country	United States
Address Line 1	800 4 <sup>th</sup> Avenue, Suite 286
City	New York
County	New York
State	NY
Postal Code	10250
Address Description	XX CUSTOMER NY
Account Site Details Operating Unit	Vision Operations
Business Purposes Bill To	<input checked="" type="checkbox"/> Primary

**Customers**

Customers >

**Create Organization**

**Cancel** **Save And Add Details** **Apply**

Customer Type **ORGANIZATION**

**Customer Information**

* Organization Name	XX Customer
Alias	
Name Pronunciation	
D-U-N-S Number	
URL	
Must include: http://	
Context Value	

**Account Information**

Account Description		Reference	
Profile Class	DEFAULT	Date Established	
Account Type	External	(example: 21-Apr-2009)	
Cust GL Class			
Tax Loc Code			
Tax Calc Code			
Cust Price Cls			
Customer Status	Default	Default Status	
Eliminations Dept			
Context Value			

**Account Site Address**

* Country	United States	
* Address Line 1	800 4th Avenue, Suite 286	
Address Line 2		
Address Line 3		
Address Line 4		
City	New York	
County	New York	
State	NY	
Postal Code	10250	
Address Description	XX CUSTOMER NY	
Global Location Number		
<input checked="" type="checkbox"/> Identifying Address		
Geography Code Override		
Context Value		

**Account Site Details**

Operating Unit	Vision Operations	Reference	
Category			
Territory			
Translation			
EDI Location			
Context Value			

**Business Purposes**

Context Value				
Purpose	Location	Bill To Location	Primary	Remove
Bill To			<input checked="" type="checkbox"/>	<input type="button" value="Delete"/>
<b>Add Another Row</b>				

- (B) Apply

- Note the Account Number: \_\_\_\_\_
- Click on the Home link.

### Access Customer in Order Management

Responsibility: Order Management Super User, Vision Operations (USA).

3. Navigate to the Sales Order Window.
- (N) Orders, Returns > Sales Orders
4. Select Customer: XX Customer (LOV)

Customer	XX Customer
Customer Number	5969
Customer PO	
Customer Contact	
Blanket Number	
Ship To Location	
Bill To Location	14100 800 4th Avenue, Suite 286 New York, NY, 10250, US
Order Number	
Order Type	
Date Ordered	22-JUN-2009 11:32:15
Price List	Corporate
Salesperson	No Sales Credit
Status	
Currency	USD
Subtotal	0.00
Tax	0.00
Charges	0.00
Total	0.00

5. Close Form without saving.
- (M) File > Close Form
- In the Decision dialog box, select (B) Discard

### Access Customer in Inventory

Responsibility: Inventory, Vision Operations (USA).

6. Navigate to the Find Customer Items Window.
- (N) Items > Customers Items > Customer Items
  - Organization: M1 Seattle Manufacturing
  - (B) OK
7. Customer Name: XX Customer (LOV)

Find Customer Items (V1)

Customer Item	<input type="text"/>
Customer Item Description	<input type="text"/>
Customer Name	<input type="text" value="XX Customer"/>
Customer Number	<input type="text" value="5969"/> ...
Commodity Code	<input type="text"/>
Commodity Code Description	<input type="text"/>
Address Category	<input checked="" type="radio"/> Any <input type="radio"/> None <input type="radio"/> <input type="text"/>
Address	<input checked="" type="radio"/> Any <input type="radio"/> None <input type="radio"/> <input type="text"/>
<input type="button" value="Clear"/> <input type="button" value="New"/> <input type="button" value="Find"/>	

8. Close Form without saving.

- (M) File > Close Form

**Note:** Customers also represents an entity shared across applications.

## Practice - Creating a New Employee and Associating it to a User (Required)

---

### Overview

In this practice, you create a new employee in the HRMS module and associate the employee with a user setup within Application Object Library.

### Assumptions

- Replace XX with your terminal number or initials.
- Verify you are logged into the Oracle applications as XXEBSTUDENT

### Tasks

#### Defining an Employee

1. Responsibility: Human Resources, Vision Enterprises
2. Navigate to the Define Person Window.  
– (N) People > Enter and Maintain
3. Enter the following information:

Field	Value
Last	<Enter your own last name>
First	<Enter your own first name>
Gender	Select Male or Female as appropriate
Action	Create Employment
Person Type	Employee

4. Save your record.
5. Record your employee number \_\_\_\_\_.

#### Creating an Assignment

6. Click (B) Assignments to navigate to the Assignment window.
7. Enter the following information:

Field	Value
Organization	Vision Operations
Team	Financials
Job	MGR500.Manager
Position	MM400.Materials Manager

8. (T) Supervisor
  - Name: Brown, Ms. Casey
9. Save your record.
10. Accept the default location value.

11. Close all windows and return to the Navigator page.

#### **Associate the Employee to a User**

12. Responsibility: System Administrator

13. Navigate to the Define Users Window.

- (N) Security > User > Define

14. Find your previously defined User record.

**Hint:** Username = XXEBSTUDENT (where XX is your terminal ID or initials).

15. In the Person field, select your employee record from the list of values.

16. Save.

## Solution: Creating a New Employee and Associating it to a User (Required)

### Defining an Employee

1. Responsibility: Human Resources, Vision Enterprises
2. Navigate to the Define Person Window.
  - (N) People > Enter and Maintain
  - (B) New
3. Enter the following information:

Field	Value
Last	<Enter your own last name>
First	<Enter your own first name>
Gender	Select Male or Female as appropriate
Action	Create Employment
Person Type	Employee

4. Click (B) OK.
5. (I) Save
6. Acknowledge the two Notes dialog boxes by clicking (B) OK on both.
7. Record your employee number \_\_\_\_\_.

**Note:** The system will generate an employee number visible in the field above the Social Security Number field.

The screenshot shows the 'People' application window with the 'Define Person' screen. The 'Name' section contains fields for Last (Samuels), First (James), Title, Prefix, Suffix, and Middle names. The 'Personal' tab is selected, displaying fields for Birth Date, Age, Town of Birth, Status, Region of Birth, Nationality, Country of Birth, Registered Disabled, and Effective Dates (From: 05-MAY-2009, To: [empty], Latest Start Date: 05-MAY-2009). Other tabs include Employment, Office Details, Applicant, Background, Rehire, Further Name, Medical, Other, and Benefits. Action and Person Type sections are also visible.

## Creating an Assignment

In this section of the solution, you learn how to assign an employee to an organization.

8. (B) Assignment

9. Enter the following information:

- Organization: Vision Operations (LOV)

**Note:** You will get a message prompting you to choose between keeping the history of the existing information and correcting the existing information.

- Click (B) Correction.

- Click (B) OK to close the People Group Flexfield window.

10. Enter the following information:

Field	Value
Job	MGR500.Manager
Position	MM400.Materials Manager

- (B) Yes to accept the default values for the position.

11. (T) Supervisor

- Name: Brown, Ms. Casey (LOV)
- (B) OK

12. (I) Save

13. (B) OK to accept the location of the new position.

Organization	Vision Operations	Group	
Job	MGR500.Manager	Position	MM400.Materials Manager
Grade		Payroll	
Location	HR- New York	Status	Active Assignment

Assignment Number	2128	Collective Agreement	
Assignment Category		Employee Category	

Salary Information	Supervisor	Probation & Notice Period	Standard Conditions	Statutory Information
--------------------	------------	---------------------------	---------------------	-----------------------

Name	Brown, Ms. Casey
Worker Number	30
Assignment Number	

Effective Dates	From 05-MAY-2009	To	[...]
-----------------	------------------	----	-------

Salary	Entries	Tax Info	Others...
--------	---------	----------	-----------

14. Close all windows to return to the navigator.

## Associating the Employee to a User

15. Responsibility: System Administrator

16. Navigate to the Define Users Window.

- (N) Security > User > Define

17. Find your previously created user record.

**Hint:** Username = XXEBSTUDENT (where XX is your terminal ID)

18. In the Person field, select your employee record (last name, first name)

Responsibility	Application	Description	Security Group	From	To
System Administrator	System Administration		Standard	05-MAY-2009	
General Ledger, Vision Oper.	General Ledger		Standard	05-MAY-2009	
Payables, Vision Services (U)	Payables		Standard	05-MAY-2009	
Purchasing, Vision Operation	Purchasing		Standard	05-MAY-2009	
Inventory, Vision Operations	Inventory		Standard	05-MAY-2009	

**Note:** An employee defined in Human Resources can be used in another application, namely Application Object Library where you can associate it with a user. Hence you can provide system access to employees via users and selectively assign them with responsibilities based on their role in the organization. This demonstrates that Employees are shared across applications.

## Practice - Understanding How Multi-Org Secures Application Data (Required)

---

### Overview

In this practice, you will create a supplier, site, and invoice. You will change operating units and see that the supplier, site, and invoice information is secured.

### Assumptions

- Replace XX with your terminal number or initials.
- You must have access to an Oracle Application Vision database, or a comparable training or test instance at your site on which to complete this practice.
- Verify you are logged into the Oracle applications as XXEBSTUDENT.

### Tasks

#### Review the Operating Unit Assignment for your Responsibilities

Review the MO: Operating Unit profile option settings for both the Payables, Vision Operations (USA) and Payables, Vision Services (USA) responsibilities.

#### Creating a Supplier

1. Create a new supplier, with the following supplier details:

Field	Value
Supplier Type	Standard (Default)
Organization Name	XX Supplier
Country of Origin	United States

- Note the Supplier Number \_\_\_\_\_.
2. Create a supplier site according to the following details in the **Address Book** link on the left hand side:
    - Enter the following information:

Field	Value
Country	Accept Default (United States)
Address Line 1	You choose
City	New York
County	New York
State	NY
Postal Code	10020
Address Name	XX SUPPLIER NY
Address Purpose	<input checked="" type="checkbox"/> Purchasing <input checked="" type="checkbox"/> Payment

- Check the box against Operating Unit = Vision Operations

3. Return to the Personal Home page.

#### **Entering an Invoice**

4. Create an invoice with the following details:

Field	Value
Trading Partner	XX Supplier (LOV)
Site	XX SUPPLIER NY (defaults)
Invoice Date	System / Current Date
Invoice Num	1000
Invoice Amount	10000

- Close Form without saving.
5. Close all the windows and return to the Navigator page.

#### **Attempting to Enter an Invoice in Another Operating Unit**

6. Attempt to create an invoice using the Payables, Vision Services (USA) Responsibility
7. Trading Partner: XX Supplier
8. Tab out of the supplier field.  
Note that this is an Invalid Supplier for this operating unit.
9. Close all the windows and return to the Navigator page.

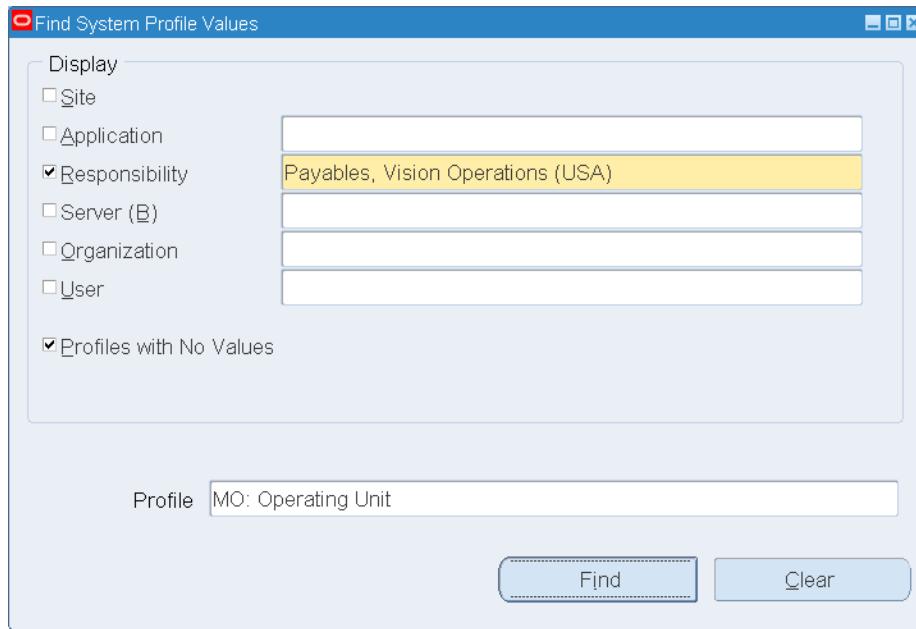
## Solution: Understanding How Multi-Org Secures Application Data (Required)

### Review the Operating Unit Assignment for your Responsibilities

Responsibility: System Administrator

1. Navigate to the System Profile Values form.
  - (N) Profile > System
2. Enter the following in the Find System Profile Values form:

Field	Value
Site	Uncheck
Responsibility	Payables, Vision Operations (USA) (LOV)
Profile	MO: Operating Unit (LOV)



3. Click (B) Find

Profile Option Name	Site	Application	Responsibility	User
MO: Operating Unit			Payables, Vision Operations Vision Operations	

Note the Operating Unit assigned to the Payables, Vision Operations (USA) responsibility.

4. Click (I) Find

5. Change Responsibility selection to: Payables, Vision Services (USA)
6. Click (B) Find

Profile Option Name	Site	Application	Responsibility	User
MO: Operating Unit			Payables, Vision Services (U)	
			Vision Services	...

Note the Operating Unit assigned to the Payables, Vision Services (USA) responsibility.

7. Close all windows to return to the Navigator.

### Creating a Supplier

Responsibility: Payables, Vision Operations (USA).

8. Navigate to the Supplier page.
- (N) Suppliers > Entry
9. (B) Create Supplier
10. Specify supplier details:

Field	Value
Supplier Type	Standard supplier (defaults)
Organization Name	XX Supplier
Country of Origin	United States (LOV)

Suppliers >  
Create Supplier  
\* Indicates required field

Supplier Type: Standard supplier

* Organization Name: XX Supplier	Country of Origin: United States
Alias:	Tax Registration Number:
Name Pronunciation:	Taxpayer ID:
D-U-N-S Number:	Supplier Home Page:
URL:	Must include: http://
Context Value:	

Cancel Apply

- (B) Apply

**Suppliers**

- Quick Update
- Company Profile
  - Organization
  - Tax Details
  - Address Book**
  - Contact Directory
  - Business Classification
  - Products & Services
  - Banking Details

**Update XX Supplier - 14: Quick Update**

\* Indicates required field

* Supplier Name	XX Supplier	Purchase Order Hold	All New
Supplier Number	<b>14</b>	Hold from Payment	All Inv
Alternate Supplier Name		Unmatch	
Registry ID	<b>58167</b>	Unvalid	
Inactive Date	(example: 20-Apr-2009)		
Alias			

**Supplier Sites**

11. Note the Supplier Number \_\_\_\_\_.
12. Click (L) Address Book on the left hand side to create a Supplier site and enter the following details:
13. (B) Create and enter the following information:

Field	Value
Country	United States (defaults)
Address Line 1	You choose
City	New York
County	New York
State	NY
Postal Code	10020
Address Name	XX SUPPLIER NY
Address Purpose	<input checked="" type="checkbox"/> Purchasing <input checked="" type="checkbox"/> Payment

**Create Address: Confirm Details**

\* Indicates required field

Supplier Name **XX Supplier** Supplier Number **14**

**Address Details**

* Country	United States	<input type="button" value=""/>
* Address Line 1	880 7th Avenue	
Address Line 2		
Address Line 3		
Address Line 4		
City	New York	
County	New York	
State	NY	
Postal Code	10020	
* Address Name	XX SUPPLIER NY	
Global Location Number		
Addressee		
Geography Code Override		
Language		
Context Value		

**Contact Details and Purpose**

Communication Details	<input type="checkbox"/> Update to all new sites created for this ad
Phone Area Code	
Phone Number	
Fax Area Code	
Fax Number	
Email Address	
Address Purpose	<input checked="" type="checkbox"/> Purchasing <input checked="" type="checkbox"/> Payment <input type="checkbox"/> RFQ Only

14. (B) Continue
15. Select Operating Unit: Vision Operations by checking the check box

Create Address: Site Creation

Address Name	<b>XX SUPPLIER NY</b>	Supplier Name	<b>XX Supplier</b>
Address Details	880 7th Avenue, New York, NY, US	Supplier Number	<b>14</b>
Purpose	Payment, Purchasing		
<b>Operating Units</b>			
<input type="checkbox"/> Select All   <input type="checkbox"/> Select None <input checked="" type="checkbox"/> Select Site Name		<b>Operating Unit</b> <input checked="" type="checkbox"/> XX SUPPLIER NY Vision Operations	

16. (B) Apply

Suppliers

- Quick Update
- Company Profile
- Organization
- Tax Details
- **Address Book**
- Contact Directory
- Business Classification
- Products & Services
- Banking Details
- Surveys
- Terms and Control
- Accounting
- Tax and Reporting
- Purchasing
- Receiving

**Confirmation**  
XX SUPPLIER NY has been added to the Address Book for XX Supplier.

**Update XX Supplier - 14: Address Book**

**Search**

Address Name	<input type="text"/>	Site Name	<input type="text"/>
Address Details	<input type="text"/>		
<input type="button" value="Go"/> <input type="button" value="Clear"/>			

**Create**

Details	Name	Address	Country	Communication Purpose	Status	Update	Manage Sites	Remove
Show	XX SUPPLIER NY	880 7th Avenue New York, NY 10020	United States	Payment, Purchasing	Current			

17. Click the Close Window link to return to the Navigator.

### Entering an Invoice

18. Navigate to the Invoices window.
- (N) Invoices: Entry > Invoices
19. Specify Supplier details.

Field	Value
Trading Partner	XX Supplier (LOV)
Site	XX SUPPLIER NY (defaults)
Invoice Date	System / Current Date
Invoice Num	1000
Invoice Amount	10000

Invoice Workbench (Payables, Vision Operations (USA))

Batch Control Total	Batch Actual Total
<input type="checkbox"/> Operating Unit <input type="checkbox"/> Customer Taxpayer ID <input type="checkbox"/> Type <input type="checkbox"/> PO Number <input type="checkbox"/> Trading Pa <input type="checkbox"/> Supplier Num <input type="checkbox"/> Supplier Site <input type="checkbox"/> Invoice Date <input type="checkbox"/> Invoice Num <input type="checkbox"/> Invoice I	
Vision Operations	Standard
	XX Supplie 14
	XX SUPPLIE
	06-MAY-200
	1000
	UAH

- Close the Form without saving.

20. Close all the windows and return to the Navigator page.

## Attempting to Enter an Invoice

Responsibility: Payables, Vision Services (USA)

21. Navigate to the Invoices Window.

- (N) Invoices > Entry > Invoices

22. Trading Partner = XX Supplier

**Note:** At the bottom left corner of the window, you will see that there are no records available for Trading Partner = XX Supplier.

FRM-40212: Invalid value for field VENDOR_NAME.
Record: 1/1 ... List of Valu... <OSC>

Note: this is an Invalid Supplier for this operating unit.

23. Close all the windows and return to the Navigator page.

Thus, it can be seen that Multi-Org secures Application Data. A Supplier created in one Operating Unit cannot be retrieved in another Operating Unit.

## Guided Demonstration - Multi-Org Access Control (MOAC) Setup, Defining Security Profile, Running System List Maintenance (Optional)

---

**Note:** Operating Units can be created by using the Accounting Setup Manager or by using the HRMS responsibility.

Here, we will use the HRMS responsibility to create Operating Units.

### Creating Operating Units

1. Responsibility: Human Resources, Vision Enterprises
2. Navigate to the Define Organization Window.
  - (N) Work Structures > Organization > Description
  - (B) New
  - Enter the following Information:

Field	Value
Name	XX OU1
Type	Business Unit (LOV)
From	Enter any date such as 01-JAN-2009
Location	New York City (LOV)

- (I) Save
 

**Note:** Until the record is saved, you cannot enter further information. You will get an error message stating “**you must save your work before you can continue.**”
- 3. In the Organization Classifications region, enter the following:
  - Name: Operating Unit (LOV)
  - (B) OK
  - Select the Enabled check box.
  - (I) Save
  - (B) Others

**Note:** Place the cursor in the field and click the Operating Unit information tab to open the Additional Organization Information Window.

  - Select Operating Unit Information from the LOV (This information is mandatory for associating the Operating Unit.)
  - Enter the following information:

Field	Value
Primary Ledger	Vision Operations (LOV)
Default Legal Context	Vision Operations (LOV)
Operating Unit Short Code	XX_OU1

- (B) OK
- (B) OK
- (B) Yes (to save the above entered information).

4. Similarly, create one more Operating Unit (XX\_OU2) using the above procedure, using the same details as above. Enter the following Information:

Field	Value
Name	XX OU2
Type	Business Unit (LOV)
From	Enter any date such as 01-JAN-2009
Location	New York City (LOV)

- (I) Save
5. In the Organization Classifications region, enter the following:
- Name: Operating Unit (LOV)
  - Select the Enabled check box
  - Save
  - (B) Others
  - Select Operating Unit Information from the LOV (This information is mandatory for associating the Operating Unit.)
  - Enter the following information:

Field	Value
Primary Ledger	AU Vision
Default Legal Context	Vision Australia
Operating Unit Short Code	XX_OU2

- (B) OK
  - (B) OK
  - (B) Yes (to save the above entered information).
6. Close all the windows and return to the Navigator page.

### Creating Global Security Profile

7. Navigate to the Global Security Profile Window.
- (N) Security > Global Profile
8. Enter the following Information:

Field	Value
Name	XX Global Security Profile
View Employee, Contingent Workers, Applicants, Contacts, Candidates	All (defaults)
Security Type	Secure organizations by organization hierarchy and/or organization list

Classification	Operating Unit
Organization	XX OU1 <input checked="" type="radio"/> Include XX OU2 <input checked="" type="radio"/> Include

9. Save

**Note:** You can associate as many Operating Units as you want though each of these operating units may belong to different Business Groups.

### Running Security List Maintenance

10. Navigate to the Submit Request Window.
  - (N) Processes and Reports > Submit Processes and Report
11. Submit a Single Request: Security List Maintenance
12. Enter the following parameters:
  - Generate Lists for: One Named Security Profile (LOV)
  - Security Profile: XX Global Security Profile
13. Submit the request and note the Request ID \_\_\_\_\_.
14. Verify the request completes normally.

**Note:** The request will be Completed / Normal. No Output will be generated.

## Practice - Covering Tasks for Multiple Operating Units Without Changing Responsibilities (Optional)

---

### Overview

In this practice, you will try to create Invoices in Payables without changing responsibilities in two different operating units.

### Assumptions

- Replace XX with your terminal number or initials.
- You must have access to an Oracle Application Vision database, or comparable training, or test instance at your site on which to complete this practice.
- Verify you are logged into the Oracle applications as XXEBSTUDENT.

### Tasks

#### Defining a Responsibility

1. Responsibility: System Administrator
2. Navigate to the Responsibilities window:
  - (N) Security > Responsibility > Define
3. Enter the following information:

Field	Value
Responsibility Name	XX New Payables Responsibility
Application	Payables
Responsibility Key	XX_NEW_AP_RESPONSIBILITY
Available From	Oracle Applications
Effective Date From	System/Current Date (defaults)
Data Group Block Name Application	Standard Payables
Menu	AP_NAVIGATE_GUI12
Request Group Block Name Application	All Reports Payables

4. (I) Save.

#### Defining a Security Profile

5. Responsibility: Human Resources, Vision Enterprises
6. Navigate to the Global Security Profile window:
  - (N) Security > Global Profile
7. Name: XX Global Security Profile
8. Choose the default All for:

- View Employees
  - View Contingent Workers
  - View Applicants
  - View Contacts
  - View Candidates
9. (T) Organization Security
- Security Type: Secure Organizations by organization hierarchy and/or organization list
10. Enter the following information:

Classification	Organization Name	Include/Exclude
Operating Unit	Vision Operations	Include
Operating Unit	Vision Services	Include

11. Save.

### Running Security List Maintenance Report

12. Navigate to the Submit a New Request window.
- (N) Processes and Reports > Submit Processes and Reports
13. Submit the Security List Maintenance report for All Global Security Profiles.
- Name: Security List Maintenance
14. Enter the following information in the Parameters window:

Field	Value
Generate Lists for	One Named Security Profile
Security Profile	XX Global Security Profile

15. Monitor the request until it has completed.

### Assigning Security Profile to Responsibility

16. Responsibility: System Administrator.
17. Navigate to the Find System Profile Value window:
- (N) Profile > System
18. Enter the following information in the Find window:
- Check Responsibility checkbox
  - XX New Payables Responsibility
  - Profile: MO%
19. (B) Find
20. In the XX New Payables Responsibility column, enter the following information:

Field	Value
MO: Default Operating Unit	Vision Operations
MO: Security Profile	XX Global Security Profile

21. Save.

### **Assign Responsibility to User**

22. Navigate to the Users window.

23. (N) Security >User > Define

- Find user: EBSTUDENT
- Assign XX New Payables Responsibility

24. Save.

25. Switch Responsibility to XX New Payables Responsibility.

26. Navigate to the Invoice Workbench window.

27. Find Operating Unit: Vision Operations, Vision Services, Vision Corporation (UK)

28. Close the form without saving.

## Solution: Covering Tasks for Multiple Operating Units Without Changing Responsibilities (Optional)

### Defining a Responsibility

1. Responsibility: System Administrator
2. Navigate to the Responsibilities window:
  - (N) Security > Responsibility > Define
3. Enter the following to create a new responsibility:

Field	Value
Responsibility Name	XX New Payables Responsibility
Application	Payables
Responsibility Key	XX_NEW_AP_RESPONSIBILITY
Available From	Oracle Applications
Effective Date From	System/Current Date (defaults)
Data Group Block Name Application	Standard Payables
Menu	AP_NAVIGATE_GUI12
Request Group Block Name Application	All Reports Payables

The screenshot shows the 'Responsibilities' window with the following details:

- Responsibility Name:** XX New Payables Responsibility
- Application:** Payables
- Responsibility Key:** XX\_NEW\_AP\_RESPONSIBILITY
- Description:** (empty)
- Effective Dates:** From 05-MAY-2009, To (empty)
- Available From:** Oracle Applications (radio button selected)
- Data Group:** Name: Standard, Application: Payables
- Request Group:** Name: All Reports, Application: Payables
- Menu:** AP\_NAVIGATE\_GUI12
- Web Host Name:** (empty)
- Web Agent Name:** (empty)
- Menu Exclusions:** A table with columns Type, Name, and Description. The first row has 'Function' selected in the Type dropdown.

4. Save.
5. Close the form.

### Defining a Security Profile

6. Responsibility: Human Resources, Vision Enterprises
7. Navigate to the Global Security Profile window:
  - (N) Security > Global Profile
8. Enter the following information:
  - Name: XX Global Security Profile
  - Choose the default “All” for the following fields:
    - View Employees
    - View Contingent Workers
    - View Applicants
    - View Contacts
    - View Candidates
9. (T) Organization Security
  - Security Type: Secure organizations by organization hierarchy and/or organization list (LOV)
  - Select/enter the following information:

Classification	Organization Name	Include / Exclude
Operating Unit	Vision Operations	Include
Operating Unit	Vision Services	Include

The screenshot shows the 'Global Security Profile' window. At the top, there's a table with two rows:

Classification	Organization Name	Include / Exclude
Operating Unit	Vision Operations	Include
Operating Unit	Vision Services	Include

Below the table are several dropdown menus for security settings:

- View Employees: All
- View Contingent Workers: All
- View Applicants: All
- View Contacts: All
- View Candidates: All

Next to these are three checkboxes:
 

- View All Records
- Allow Granted Users
- Restrict on Individual Assignments

The window has tabs at the bottom: Organization Security (selected), Supervisor Security, Miscellaneous Security, Custom Security, and Static Lists.

In the Organization Security tab, there's a 'Security Type' dropdown set to 'Secure organizations by organization hierarchy and/or organization list'. Below it is a 'Organization Hierarchy' input field.

Under 'Specify Top Organization', there are two radio buttons:
 

- Specify Top Organization: (empty input field)
- Use the Organization on the User's Assignment(s) as the Top Organization

There are also checkboxes for 'Include Top Organization' and 'Exclude Business Groups'.

At the bottom, there's another table showing classification and organization names, with 'Include' and 'Exclude' radio buttons next to each row. The second row ('Operating Unit, Vision Services') is highlighted in yellow.

10. Save.

11. Close the form.

### **Running Security List Maintenance Report**

12. Navigate to the Submit a New Request window:

- (N) Processes and Reports > Submit Processes and Reports

13. Choose the default Single Request.

- (B) OK

14. Enter the following information:

- Name: Security List Maintenance (LOV)
- Enter the following information in the Parameters window:

Field	Value
Generate Lists for	One Named Security Profile
Security Profile	XX Global Security Profile

- (B) OK
- (B) Submit
- (B) No in the Decision Box

15. Monitor the request until it has completed:

- (M) View > Requests
- (B) Find
- Ensure that the Security List Maintenance requests completes normally
- Close the Requests window.

### **Assigning Security Profile to Responsibility**

16. Responsibility: System Administrator

17. Navigate to the Find System Profile Value window:

- (N) Profile > System

18. Enter the following information:

- Deselect the Site check box.
- Select the Responsibility check box.
- Responsibility: XX New Payables Responsibility
- Profile: MO%

**Display**

Site

Application

Responsibility

Server (B)

Organization

User

Profiles with No Values

Profile  ...

Find Clear

- (B) Find

19. Set the profile option values for XX New Payables Responsibility as follows:

Field	Value
MO: Default Operating Unit	Vision Operations
MO: Security Profile	XX Global Security Profile

Profile Option Name	Site	Application	Responsibility	User
MO: Default Operating Unit			Vision Operations	
MO: Distributed Environment				
MO: Operating Unit				
MO: Security Profile			XX Global Security Profile	
MO: Set Client_Info for Debugging				
Modified Historic Cost Accounting : Debi				

20. (I) Save.
  21. Close the form.

## Assigning Responsibility to User

22. Navigate to the Users window:  
▪ (N) Security > User > Define

- Find User: XXEBSTUDENT
- (T) Direct Responsibilities
- (I) New
- Responsibility: XX New Payables Responsibility

The screenshot shows the 'Users' window in Oracle E-Business Suite. The 'User Name' field contains 'XXEBSTUDENT'. Under 'Password Expiration', the 'None' option is selected. In the 'Effective Dates' section, the 'From' date is set to '05-MAY-2009'. The 'Direct Responsibilities' tab is active, showing a list of responsibilities assigned to the user:

Responsibility	Application	Description	Security Group	From	To
System Administrator	System Administration		Standard	05-MAY-2009	
General Ledger, Vision Oper.	General Ledger		Standard	05-MAY-2009	
<b>XX New Payables Responsibility</b>	Payables		Standard	<b>05-MAY-2009</b>	
Payables, Vision Services (U)	Payables		Standard	05-MAY-2009	
Purchasing, Vision Operation	Purchasing		Standard	05-MAY-2009	

23. Save.
24. Close the form.
25. Responsibility: XX New Payables Responsibility
26. Navigate to the Invoice Workbench window:
  - (N) Invoices > Entry > Invoices
27. Click on the LOV button in the Operating Unit field: you can find Vision Operations (USA), Vision Services (USA), Vision Corporation (UK).
 

**Note:** You can find all the Operating Units (OU) that were associated with the Global Security Profile, and you can enter Invoices in one OU, and pay through the other without switching responsibilities.
28. Close the form without saving.

## Guided Demonstration - Using the Workflow Monitor (Required)

---

### Create an Expense Report

Login: jfrost/welcome

Responsibility: iExpenses > (B) Create Expense Report

1. Create and submit an expense report.

**Note:** When an employee submits an expense report, the Workflow Engine initiates the Expenses workflow process. This workflow consists of several connected processes that send notifications to managers and employees, ensure reports adhere to company policy, check manager approval levels and, if necessary, split an expense report into multiple reports.

2. Note the:

Expense Report Number \_\_\_\_\_

Approver \_\_\_\_\_

### View the Workflow Monitor

Responsibility: Workflow

3. Navigation: Self Service Workflow > Status Monitor
4. Click (B) Go to View the In Process Workflows
5. View Diagram for the submitted Expense Report

**Note:** Upon submission the workflow went through Server Side Validation and is now within the Manager Spending Approval Process. Drill down on the Manager Spending Approval Process to show all the activities which have occurred so far.

### View the Expense Report as an Auditor

Login: operations/welcome

Responsibility: Internet Expenses Auditor, Vision Operations

6. (T) Expenses Audit > (ST) Audit Expense Reports (defaults)
7. Enter Expense Report Number in the Search by Expense Report Number field.

**Note:** Information input within iExpenses appears in Payables. Observe that the Reviewed by – Management checkbox is unchecked.

### Approve the Transaction

Login: kjones/welcome

Responsibility: @Workflow

8. Navigation: (L) Advanced Worklist
9. Open the Notification and Approve the Expense Report.

**Note:** The Notification is removed from Kerry Jones' Open Notifications worklist.

### View the Workflow Monitor and Notification

Login: jfrost/welcome

Responsibility: Workflow

10. Navigation: Self Service Workflow > Status Monitor
11. View the Status Diagram for your Expense Report.

**Note:** The Workflow has progressed to the AP Approval Process. Drill into the AP Approval Process, observe that the Workflow is now sitting on a Blocking activity. We are waiting on Payables to verify the receipts and check the Payables Reviewed checkbox, which makes the callback to workflow to continue working.

12. (T) Notifications
13. View the Notification sent to Jamie Frost informing him that Kerry Jones has approved his expense report.

### Complete the Expense Report Audit

Login: operations/welcome

Responsibility: Internet Expenses Auditor, Vision Operations

14. (T) Expenses Audit > (ST) Audit Expense Reports (defaults)
15. Enter Expense Report Number in the Search by Expense Report Number field.

**Note:** The Reviewed by – Management checkbox is now checked.

16. Enter today's date in the Receipt Package Received Date
17. Click (B) Mark Receipts as Verified
18. Scroll to bottom of page, verify Expense Report Action is set to Complete Audit
19. Click (B) Apply

**Note:** The Reviewed by Payables checkbox is now checked.

### View the Workflow Monitor

Login: jfrost/welcome

Responsibility: Workflow

20. Navigation: Self Service Workflow > Status Monitor
21. View the Status Diagram for your Expense Report. You'll need to change the Status to Complete before searching.

**Note:** Follow the green transition lines through the process through to the end, where it displays that you have a completed expense report transaction.

## Practice - Viewing Approval Process Using Workflow Monitor (Required)

---

### Overview

In this practice, you will view requisition approval by using Workflow Monitor.

#### Assumptions

- Replace XX with your terminal number or initials.
- You must have access to an Oracle Application Vision database, or a comparable training or test instance at your site on which to complete this practice.
- Verify you are logged into the Oracle applications as XXEBSTUDENT

### Tasks

#### Creating a Requisition

1. Responsibility: Purchasing, Vision Operations (USA)
2. Navigate to the Requisitions Window:
  - (N) Requisitions > Requisitions
3. Specify the requisition details:

Field	Value
Operating Unit	Vision Operations
Description	XX Supplies
Type	Purchase Requisition
Item	f71000
Quantity	10
Need by	<i>Today's date + 1</i>
Requestor	<i>Your name</i>

4. Save your requisition.
5. Review the accounting distributions created automatically by Workflow.
6. Make a note of your requisition number: \_\_\_\_\_
7. Submit your requisition for approval.

#### Viewing Approval through Workflow

8. Navigate to the Requisitions Summary Window:
  - (N) Requisitions > Requisition Summary
9. Find your requisition.
10. (M) Tools > View Approval through Workflow
11. View the diagram. Drill down on both the Verify Approval Authority and Approval List Routing subprocesses.
12. Close the Workflow Monitor.

13. (M) File > Exit Oracle Applications
14. Make your Personal Home Page the active page, and then log out.

### Approving the Requisition

15. Log in as cbaker and approve the requisition:

- User: cbaker
- Password: welcome

### Viewing Approval through Workflow

16. Log in as XXebstudent:

- User: XXebstudent
- Password: welcome

17. Responsibility: Purchasing, Vision Operations

18. Navigate to the Requisition Summary Window:

- (N) Requisitions > Requisitions

19. Find your requisition and view the requisition approval by using the Workflow Monitor:

- Requisition Number: *Your requisition number*

20. Close the Workflow Monitor.

## Solution: Viewing Approval Process Using Workflow Monitor (Required)

---

### Creating a Requisition

1. Responsibility: Purchasing, Vision Operations
2. Navigate to the Requisitions Window:
  - (N) Requisitions > Requisitions
3. Specify the requisition details:

Field	Value
Operating Unit	Vision Operations
Description	XX Supplies
Type	Purchase Requisition ( <i>defaults</i> )
Preparer	<i>Your name</i>
Item	f71000 (LOV)
Quantity	10
Need by	Today's date + 1
Requestor	<i>Your name</i>

4. Save your requisition and make a note of your requisition number: \_\_\_\_\_

The screenshot shows the 'Requisitions - [New]' window. The requisition details are as follows:

- Operating Unit: Vision Operations
- Number: 14407
- Type: Purchase Requisition
- Description: XX Supplies
- Status: Incomplete
- Total: USD 9,490.00

The 'Lines' tab is selected, displaying one line item:

Num	Category	Description	UOM	Quantity	Price	Need-By
1	PRODUCTN.MON	18" LCD Flat Panel Mon	Each	10	949	16-JUN-2009 00

Below the table, the 'Destination Type' is set to 'Expense'. The 'Source' section shows 'Supplier' as the selected source. Other fields include Requester (Samuels, James), Organization (Vision Operations), Location (V1- New York City), and SubInventory.

Buttons at the bottom include 'Outside Services', 'Catalog...', 'Distributions', and 'Approve...'. The 'Distributions' button is highlighted.

5. (B) Distributions

Note: Account Generator (Workflow) has generated default accounting combinations for the Charge Account, Accrual Account and Variance Account. Scroll to see generated account combinations.

**Distributions - [New]**

		Accounts		Project			
Num	Quantity	Charge Account	Recovery Rate	GL Date	Budget Account	[ ]	
1	10	01-510-7530-0000-000					

Account Description

Charge	Operations-Vision Operations In-Equipm	Budget	
Accrual	Operations-No Department-Accounts Pa	Variance	Operations-Vision Operations In-Equipm

- Close the Distributions Window.
6. (B) Approve
- Verify the 'Submit for Approval' check box is checked.
  - Select the Forward check box.

**Approve Document - 14407**

Approval Details	Additional Options
<b>Encumbrance</b> <input type="checkbox"/> Reserve <input type="checkbox"/> Unreserve      Unreserve Date: <input type="text"/> <input type="checkbox"/> Use GL Override <input type="checkbox"/> Use Document GL Date to Unreserve      Accounting Date: <input type="text"/>	
<b>Approval</b> <input checked="" type="checkbox"/> Submit for Approval      Forward From: Samuels, James <input checked="" type="checkbox"/> Forward      Approval Path: Materials <input type="checkbox"/> Note: <input type="text"/> <input type="checkbox"/> Change Summary: <input type="text"/>	
<b>Transmission Methods</b> <input type="checkbox"/> Print      FAX Number: <input type="text"/> XML: <input type="radio"/> <input type="checkbox"/> Fax      E-Mail Address: <input type="text"/> EDI: <input type="radio"/> <input type="checkbox"/> E-Mail	
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

- (B) OK
7. Close the Requisitions Window.
- ### Viewing Approval through Workflow
8. Navigate to the Requisitions Summary Window:
- (N) Requisitions > Requisition Summary
9. Find your requisition:
- Requisition Number: *Your requisition number*
10. (B) Find



## 11. (M) Tools > View Approval through Workflow

**Activity History**

Status Diagram  
Participant Responses  
Workflow Details

**Monitor Activities History****Activity History: REQAPPRV, 203644-581365****View Process Hierarchy**[Expand All](#) | [Collapse All](#)

Focus Process Name	Status	Workflow Type	Item Key	User Key	Owned By	Started	Completed
Main Requisition Approval	Active	PO Requisition Approval	203644-581365		Samuels, James	15-Jun-2009 16:12:48	

Workflow Type **PO Requisition Approval**Status **Active**Started **15-Jun-2009 16:12:48**

Completed

**Search**

Set activity filters and select the "Go" button to view corresponding results.

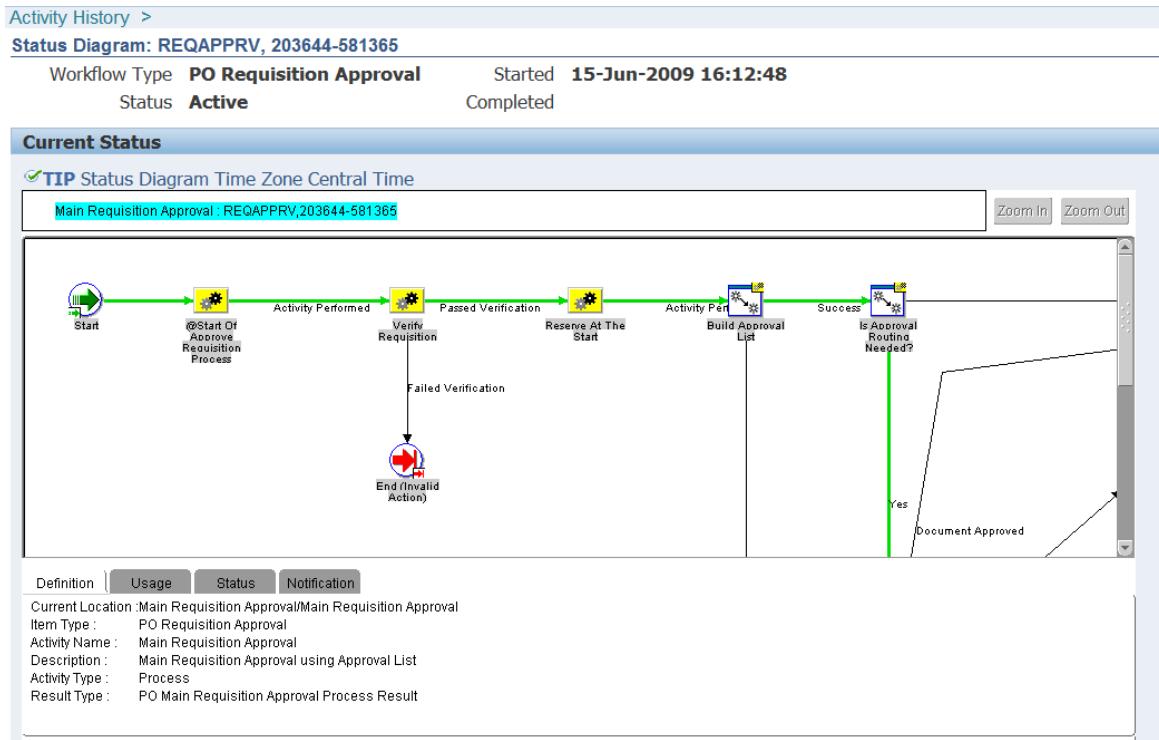
Activity Type	<input checked="" type="checkbox"/> Response Notifications	Activity Status	<input checked="" type="checkbox"/> Active
	<input checked="" type="checkbox"/> FYI Notifications		<input checked="" type="checkbox"/> Complete
	<input checked="" type="checkbox"/> Functions and Processes		<input checked="" type="checkbox"/> Error
	<input checked="" type="checkbox"/> Standard Workflow		<input checked="" type="checkbox"/> Suspended
	<input checked="" type="checkbox"/> Events		

**Go****Results: Activities**[Previous](#) [1-10](#) [Next 10](#)

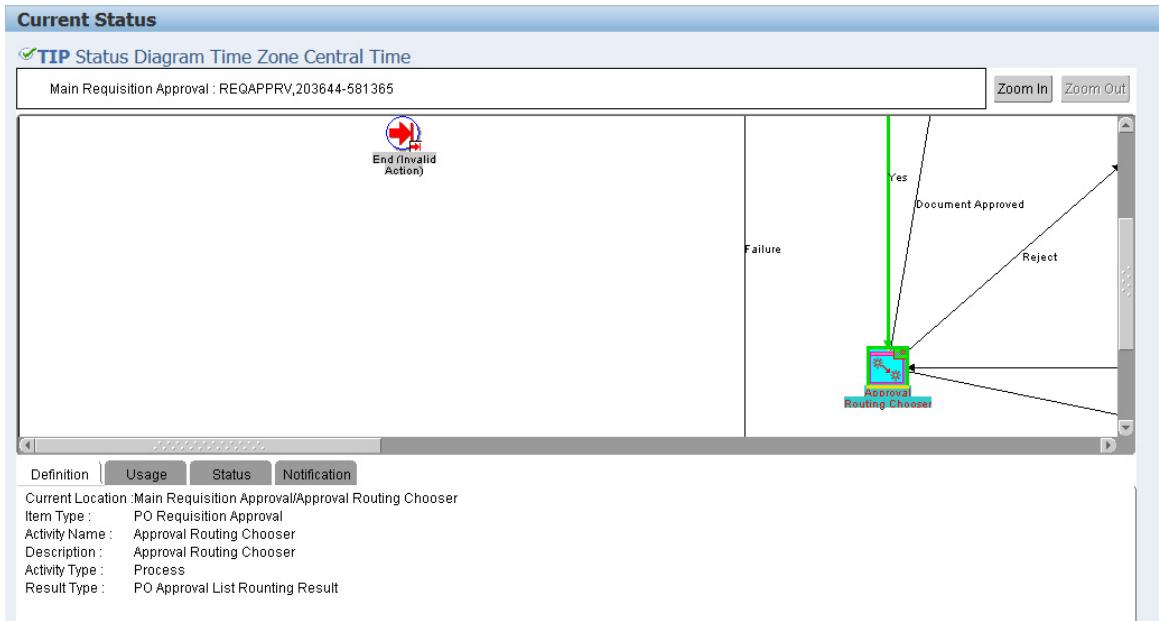
Select	Status	Activity	Parent Activity	Notification Performer	Started	Completed	Activity Result
<input type="radio"/>	Notified	Approve Requisition Notification	Notify Approver	Baker, Catherine	15-Jun-2009 16:12:49		
<input type="radio"/>	✓ Complete	Update Action History (Expect Response)	Notify Approver		15-Jun-2009 16:12:49	15-Jun-2009 16:12:49	Activity Performed
<input type="radio"/>	✓ Complete	Start	Notify Approver		15-Jun-2009 16:12:49	15-Jun-2009 16:12:49	
<input type="radio"/>	✓ Active	Notify Approver Chooser	Notify Approver Chooser		15-Jun-2009 16:12:49		
<input type="radio"/>	✓ Complete	Is Forward Action Allowed?	Notify Approver Chooser		15-Jun-2009 16:12:49	15-Jun-2009 16:12:49	Yes
<input type="radio"/>	✓ Complete	Start	Notify Approver Chooser		15-Jun-2009 16:12:49	15-Jun-2009 16:12:49	
<input type="radio"/>	✓ Active	Notify Approver Chooser	Approval List Routing		15-Jun-2009 16:12:49		
<input type="radio"/>	✓ Complete	Get Approval Notification Attribute	Approval List Routing		15-Jun-2009 16:12:49	15-Jun-2009 16:12:49	Activity Performed
<input type="radio"/>	✓ Complete	Get Requisition Attributes	Approval List Routing		15-Jun-2009 16:12:49	15-Jun-2009 16:12:49	Activity Performed
<input type="radio"/>	✓ Complete	Get Next Approver	Approval List Routing		15-Jun-2009 16:12:49	15-Jun-2009 16:12:49	Valid Approver

[Previous](#) [1-10](#) [Next 10](#) **View Diagram****12. (B) View Diagram**

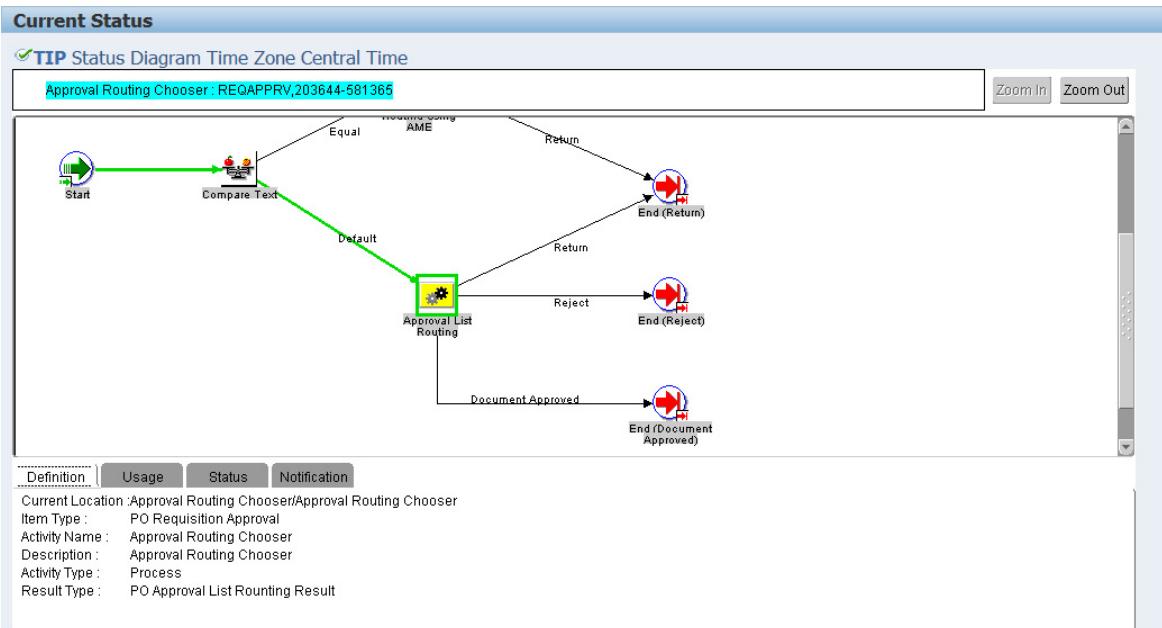
**Note:** You can also view the diagram by clicking (L) Status Diagram on the left Navigation pane.



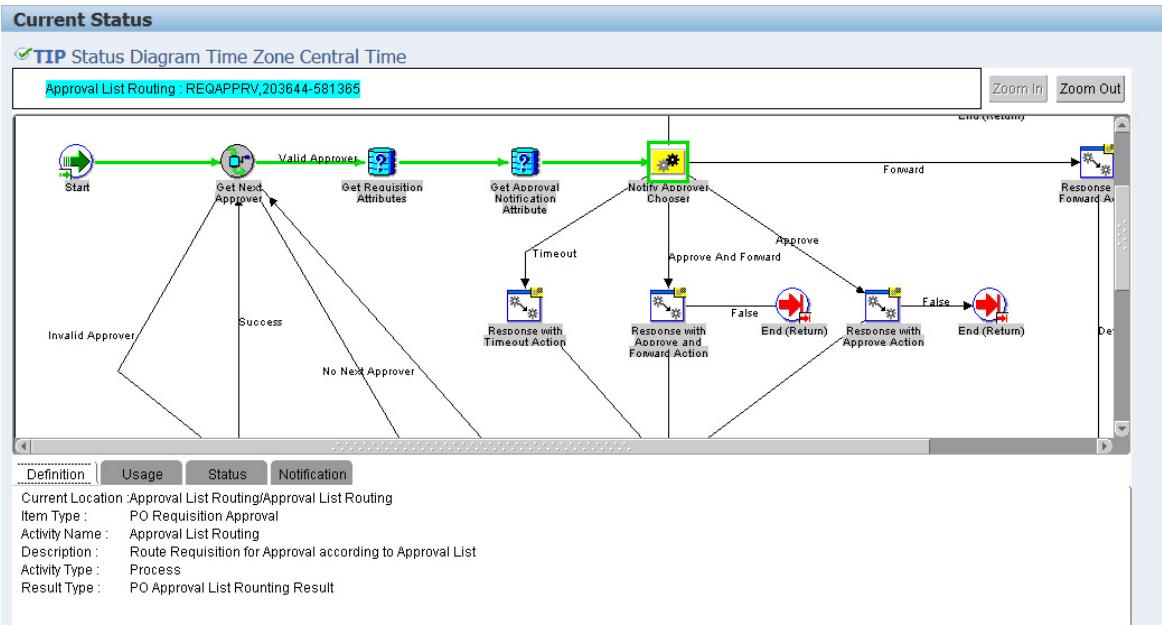
13. Follow the green transition lines to the Approval Routing Chooser process (icon).



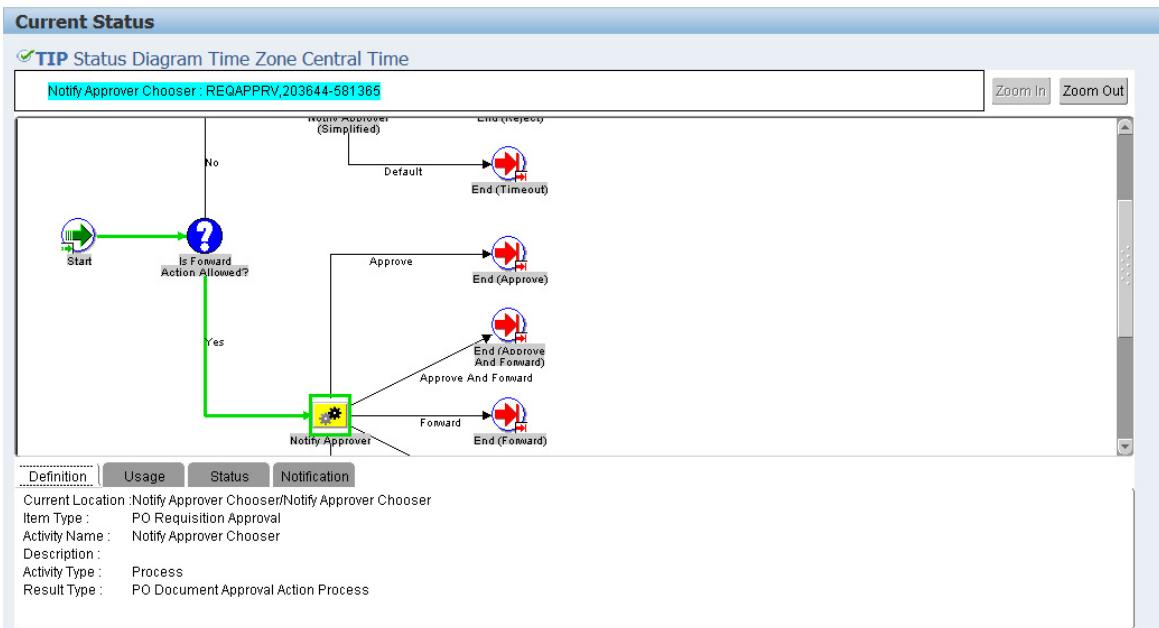
- Double-click on the process to view the details of the Approval Routing Chooser subprocess.



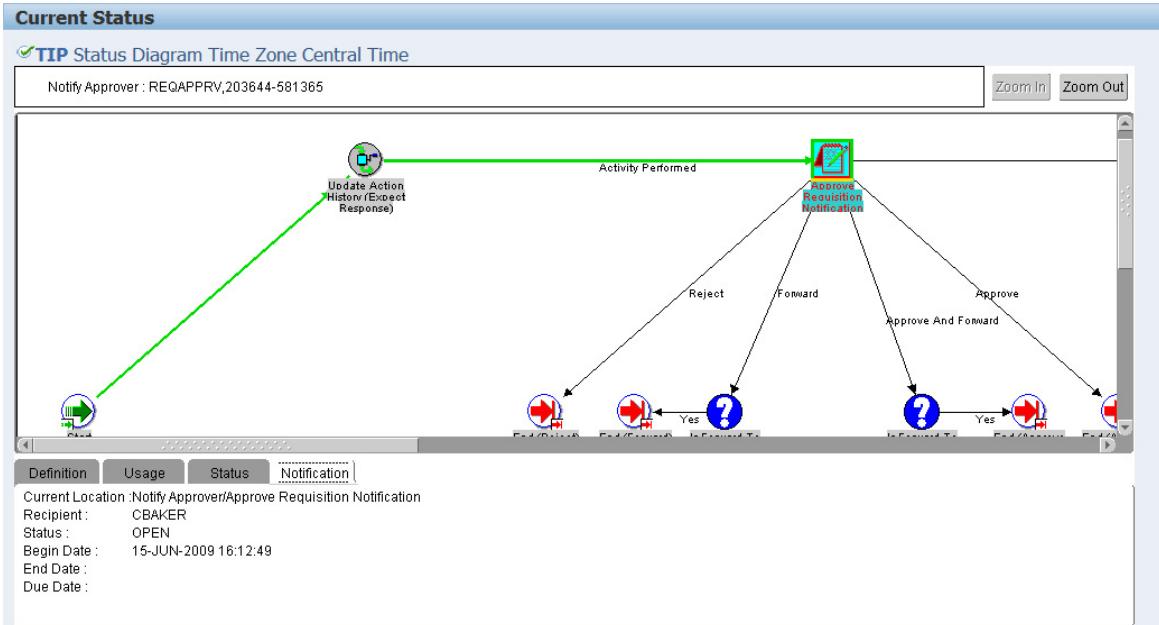
- Follow the green transition lines to the Approval List Routing subprocess and select the icon.
    - Double-click the subprocess to open the Approval List Routing subprocess.



- Double-click Notify Approver Chooser process icon to view the subprocess.



- Double-click the Notify Approver process icon to view the Notify Approver subprocess.
- Select the Approve Requisition Notification activity.
- Click (T) Notification



- Observe: An approver has been found and a notification has been sent to cbaker. The requisition is now awaiting action from cbaker.

- Close the Workflow Monitor Web page.
- Log out of the applications completely.

## Approving the Requisition

- Log in as cbaker:
  - User: cbaker
  - Password: welcome

18. (L) Notifications under Favorites

The screenshot shows the Oracle Self-Service Workflow interface. At the top, there's a navigation bar with links for Home, Status Monitor, and Notifications. Below that is a toolbar with buttons for View, Open Notifications, Go, Select Notifications (with Open, Reassign, Close options), Select All, and Select None. A table lists one notification: From Samuels, James, Type PO Requisition Approval, Subject Purchase Requisition 14407 for Samuels, James (9,490.00 USD), Sent 15-Jun-2009, Due 15-Jun-2009.

Note: the requisition approval notification is awaiting action from cbaker.

- Click on the subject line in the Subject column to view the notification.

This screenshot shows the detailed view of the purchase requisition. At the top, there are buttons for Approve, Approve And Forward, Forward, Reject, Reassign, and Request Information. The requisition details are as follows:

From: Samuels, James	Description: XX Supplies
To: Baker, Catherine	Requisition Total: 9,490.00 USD
Sent: 15-Jun-2009 14:12:49	Non-recoverable Tax: 0.00 USD
ID: 6371511	

**Requisition Lines:**

Line	Description	Supplier	Cost Center	Unit	Quantity	Price (USD)	Amount (USD)
1	18" LCD Flat Panel Monitor	510	Each	10	949	9,490.00	

**Approval Sequence:**

```

graph LR
    A[Samuels, James] --> B[Baker, Catherine]
    B --> C[Pre-Approved]
    style A fill:#e0f2e0
    style B fill:#e0f2e0
    style C fill:#e0f2e0
  
```

**Related Applications:**

- Edit Requisition
- View Requisition Details
- Open Document

**Response:**

Forward To: All Employees and Users

**Action Buttons:**

Approve, Approve And Forward, Forward, Reject, Reassign, Request Information

19. Click (B) Approve to approve the requisition.

20. Log out of Oracle Applications.

### Viewing Approval

21. Log in as XXebstudent:

- User: XXEBSTUDENT
- Password: welcome

22. Responsibility: Purchasing, Vision Operations (USA)

23. Navigate to the Notification Worklist

- (N) Notifications Summary

Select From	Type	Subject	Sent	Due
Baker, Catherine	PO Requisition Approval	Purchase Requisition 14407 has been approved	15-Jun-2009	

24. Click on the Subject Line in the Subject column to view the notification.

Line	Description	Supplier	Cost Center	Unit	Quantity	Price (USD)	Amount (USD)
1	18" LCD Flat Panel Monitor	510	Each	10	949	9,490.00	

Num	Name	Action	Action Date	Note
1	Samuels, James	Submitted	15-Jun-2009 16:12:49	
2	Baker, Catherine	Approved	15-Jun-2009 16:53:58	

- Click (B) OK to acknowledge and close the notification.
- Click (L) Home to return to the Personal Home Page.

### Viewing Approval through Workflow

25. Navigate to the Requisition Summary Window:
- (N) Requisitions > Requisitions Summary
26. Find your requisition:
- Requisition Number: *Your requisition number*
  - (B) Find

**Requisition Headers Summary**

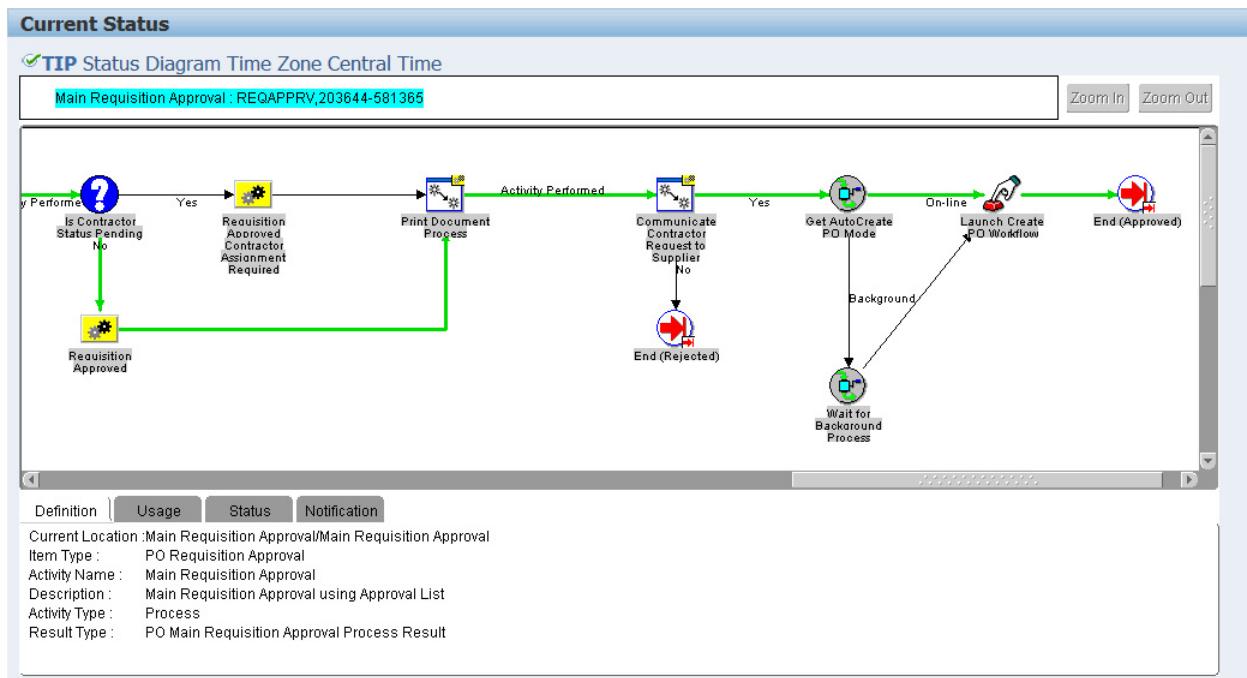
Number	Description	Approval Status	Creation Date	Curre
14407	XX Supplies	Approved	15-JUN-2009 15:53:40	USD

Lines      New      Open

27. (M) Tools > View Approval through Workflow

28. Click (L) View Diagram

- Follow the green transition lines through the requisition approval process.



Note: Your requisition approval has completed with a status of Approved.

29. Close the Workflow Monitor.

30. Close the Requisition Summary form to return to the Navigator.

## Guided Demonstration - Activating an Event Alert (Optional)

---

### Activating an Event Alert

Responsibility: Alert Manager, Vision Enterprises

1. Navigate to the Alert window:
  - (N) Alert > Define
2. Query the ADS JPHR New Hire
  - Application: Human Resources
  - Name: ADS JPHR New Hire Workflow
  - Select the After Insert check box.
  - Select the Enabled check box.
3. (I) Save.
4. (B) Actions
5. (B) Action Details
 

Note: The SQL statement launches a workflow process.
6. Close all windows until you are back at the Navigator.

### Entering a New Employee

Responsibility: Human Resources, Vision Enterprises

7. Navigate to the Find Person window:
  - (N) People > Enter and Maintain
  - (B) New
8. Create a new employee by entering the following information:

Field	Value
Employee Name	Enter Last Name and First Name
Gender	You Choose
Action	Create Employment (Select from the LOV)
Person Type	Employee (Select from the LOV)

9. (I) Save.
10. Click (B) OK twice to accept the Notes
11. Close all windows until you are back at the Navigator.

### Viewing the Concurrent Request

Responsibility: System Administrator

12. Navigate to the standard request submission form:
    - (N) Concurrent > Requests
- Note: The standard request submission form is in system administrator mode.
- Note: The event alert started a concurrent request.

### Viewing Event History

Responsibility: Alert Manager, Vision Enterprises

13. Navigate to the Review Alert History window:
  - (N) Alert > History
14. View event history:
  - Application: Human Resources
  - Alert Name: ADS JPHR New Hire
  - View History Dates: Enter the appropriate date range
15. (B) Find Checks

**Note:** The action set has been completed.

## Practice - Creating and Testing a Periodic Alert (Optional)

---

### Overview

In this practice, you create and test a periodic alert.

### Assumptions

- Replace XX with your terminal number or initials.
- You must have access to an Oracle Application Vision database, or a comparable training or test instance at your site on which to complete this practice.
- Verify you are logged into the Oracle applications as XXEBSTUDENT

### Tasks

#### Defining an Alert

1. Define a periodic alert:

Field	Value
Application	Payables
Name	XX Invoices on Hold
Enabled	<i>Selected</i>
Frequency	On Demand
Keep	2 Days
Select Statement	<pre> SELECT aph.hold_reason , aph.hold_lookup_code , api.invoice_num , aps.vendor_name INTO &amp;hold_reason , &amp;hold_type , &amp;invoice_number , &amp;vendor_name FROM ap_suppliers aps , ap_invoices_all api , ap_holds_all aph , hr_organization_units hou WHERE hou.name = 'Vision Operations' AND hou.organization_id = aph.org_id AND aph.release_lookup_code is NULL AND aph.invoice_id = api.invoice_id AND api.vendor_id = aps.vendor_id ORDER BY aps.vendor_name </pre>

2. Verify the written syntax.

## Defining Alert Outputs

3. Define alert details. Specify output details according to the following table:

Output Name	Description	Max Length Summary
HOLD_REASON	HOLD_REASON	25
HOLD_TYPE	HOLD_TYPE	20
INVOICE_NUMBER	INVOICE_NUMBER	
VENDOR_NAME	VENDOR_NAME	

## Defining Alert Actions

4. Define Alert actions according to the following table:

Action Name	Description	Action Level
Invoices on Hold Email Notification	Summary email notification of invoices on hold	Summary

## Defining Action Details

5. Define action details, including text message and email information. The message should wrap when it exceeds a width of 80 characters.
6. Enter text according to the following table:

Text
Vendor Name      Invoice Number      Hold Type      Hold Reason =***= Enter summary template below this line =***= **&vendor_name &invoice_number    &hold_type    &hold_reason =***= Enter summary template above this line =***=

## Defining a No Exception Action

7. Define Alert actions according to the following table:

Action Name	Description	Action Level
No Invoices on Hold Email Notification	No invoices on hold email notification	No Exception

## Defining Action Details

8. Define action details as appropriate, then define an action set according to the following table:

Seq	Action Set Name	Description
1	Emails	Email notification

## Adding Actions to the Action Set

9. Add actions according to the following table:

Seq	Action	On Error Action
1	Invoices on Hold Email Notification	Abort
2	No Invoices on Hold Email Notification	Abort

## Testing the Alert

10. Navigate to the Request Periodic Alert Check Window.

## Monitoring the Request

11. Monitor the request until it completes.

## Reviewing Alert History

12. Navigate to the Review Alert History Window.
13. View the Action Log.

## Solution: Creating and Testing a Periodic Alert (Optional)

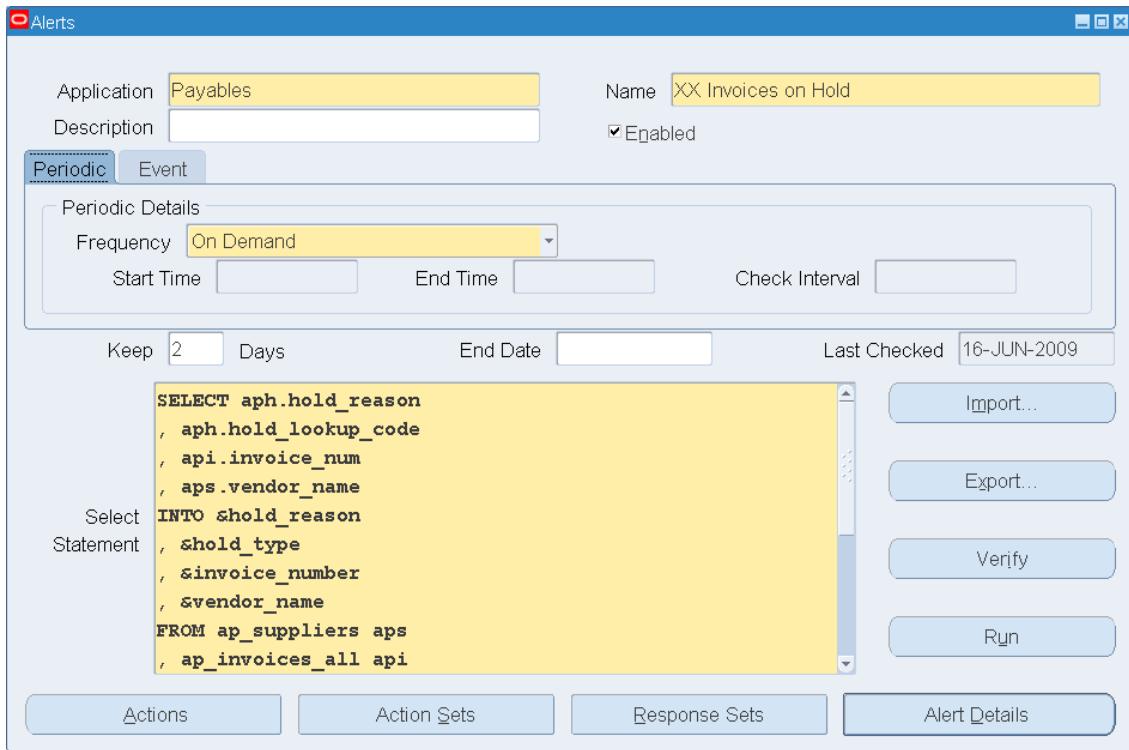
---

### Defining an Alert

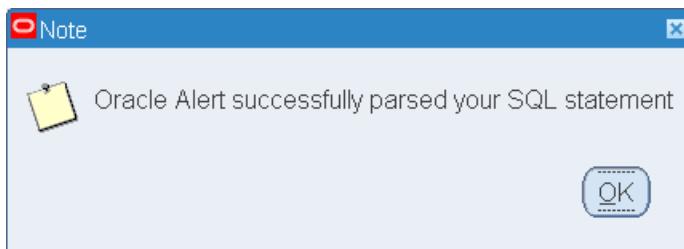
Responsibility: Alert Manager, Vision Enterprises

1. (N) Alert > Define to open the Alerts window
2. Define a periodic alert:

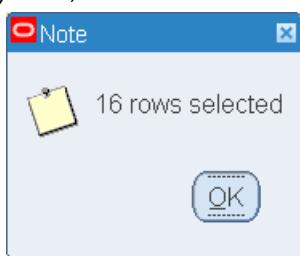
Field	Value
Application	Payables
Name	XX Invoices on Hold
Enabled	<i>Selected</i>
Frequency	On Demand
Keep	2 Days
Select Statement	<pre>SELECT aph.hold_reason , aph.hold_lookup_code , api.invoice_num , aps.vendor_name INTO &amp;hold_reason , &amp;hold_type , &amp;invoice_number , &amp;vendor_name FROM ap_suppliers aps , ap_invoices_all api , ap_holds_all aph , hr_organization_units hou WHERE hou.name = 'Vision Operations' AND hou.organization_id = aph.org_id AND aph.release_lookup_code is NULL AND aph.invoice_id = api.invoice_id AND api.vendor_id = aps.vendor_id ORDER BY aps.vendor_name</pre>



3. (B) Save
4. (B) Verify, to check whether the syntax written is correct.



5. (B) Run, to check the number of records retrieved.



6. (B) OK

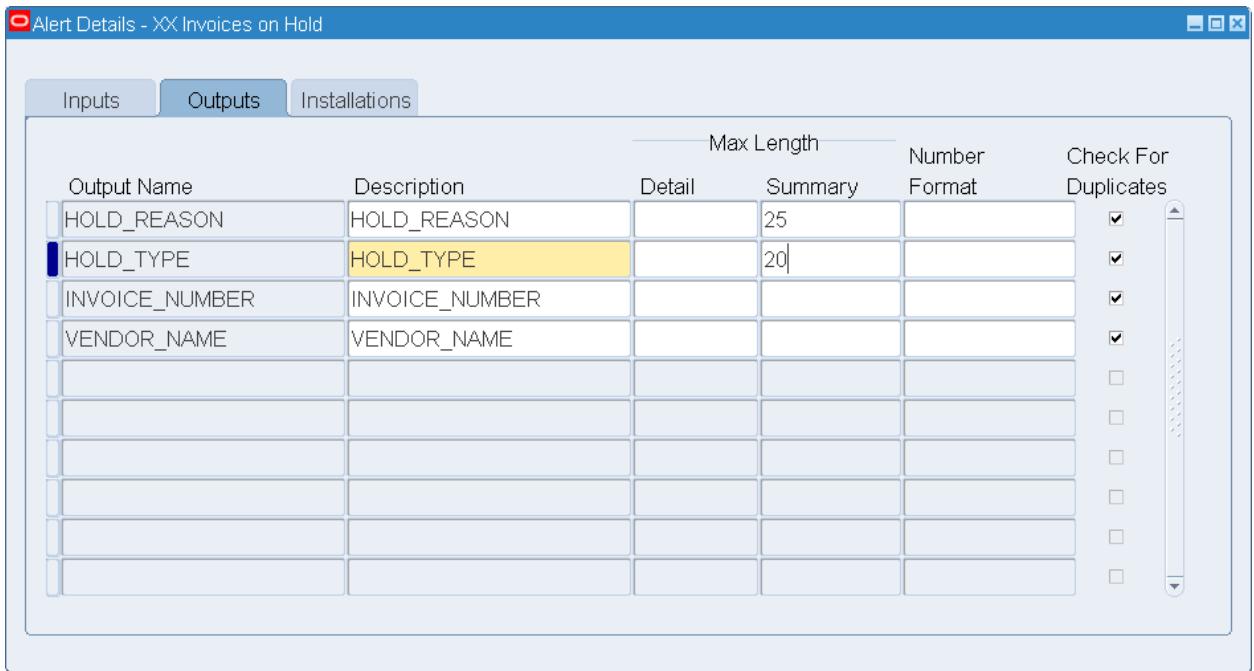
### Defining Alert Outputs

7. (B) Alert Details

## 8. (T) Outputs

- Specify output details according to the following table:

<b>Output Name</b>	<b>Description</b>	<b>Max Length Summary</b>
HOLD_REASON	HOLD_REASON	25
HOLD_TYPE	HOLD_TYPE	20
INVOICE_NUMBER	INVOICE_NUMBER	
VENDOR_NAME	VENDOR_NAME	



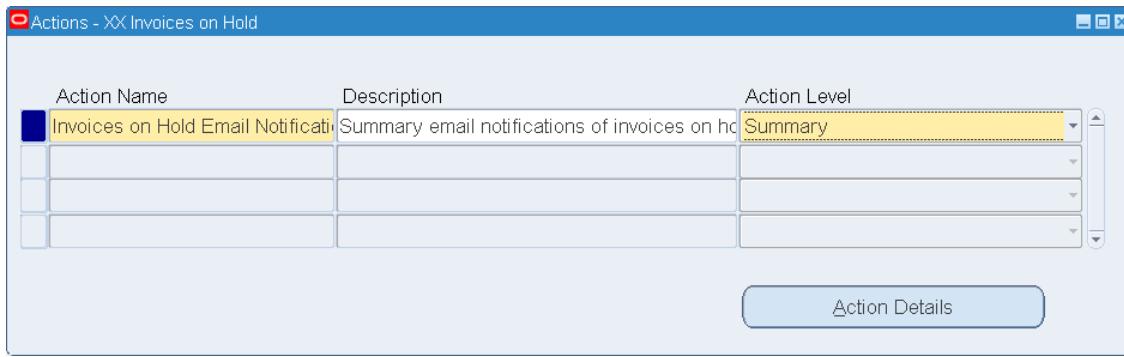
- Save

## 9. Close the Alert Details Window

## Defining Alert

- #### **(B) Actions**

Action Name	Description	Action Level
Invoices on Hold Email Notification	Summary email notification of invoices on hold	Summary



### Defining Action Details

#### 11. Click (B) Action Details

- In the Action Details Window, enter the following:

Field	Value
Action Type	Message
To	<i>Enter an appropriate email address (e.g., pat.stock@vision.com)</i>
Subject	XX Summary of Invoices on Hold
Text	Vendor Name      Invoice Number      Hold Type      Hold Reason =***= Enter summary template below this line =***= **&vendor_name    &invoice_number    &hold_type &hold_reason =***= Enter summary template above this line =***=
Column Overflow	Wrap
Max Width	80

Action Details - [New]

Action Type	Message
List	Reply To
To	pat.stock@vision.com
Subject	XX Summary of Invoices on Hold
Cc	
Bcc	
Print For User	Printer
Response Set	Response Days
<input type="radio"/> File (C)	
<input checked="" type="radio"/> Text (D)	<pre>Vendor Name    Invoice Number    Hold Type    Hold Reason ==== Enter summary template below this line ==== &amp;vendor_name &amp;invoice_number &amp;hold_type &amp;hold_reason ==== Enter summary template above this line ====</pre>
Column Overflow	Wrap
Max Width	80
<input type="button" value="Import..."/>	

- (B) Save
12. Close the Action Details Window.
- Defining a Second Action Type**
13. Define Alert actions according to the following table:

Action Name	Description	Action Level
No Invoices on Hold e-Mail Notification	No invoices on hold email notification	No Exception

Actions - XX Invoices on Hold

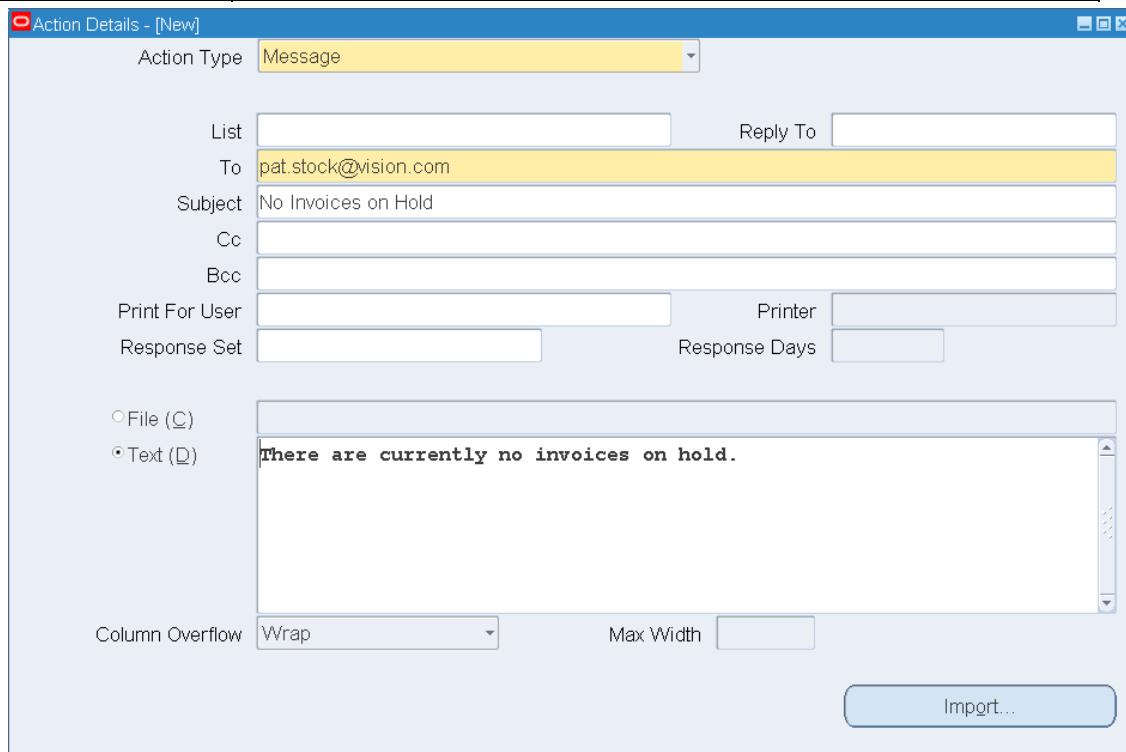
Action Name	Description	Action Level
Invoices on Hold Email Notification	Summary email notifications of invoices on hold	Summary
No Invoices on Hold Email Notification	No invoices on hold email notification	No Exception

## Defining Action Details

### 14. (B) Action Details

- In the Action Details Window, enter the following:

Field	Value
Action Type	Message
To	<i>Enter an appropriate email address (e.g., <a href="mailto:pat.stock@vision.com">pat.stock@vision.com</a>)</i>
Subject	No Invoices on Hold
Text	There are currently no invoices on hold.



- Save

### 15. Close the Action Details Window

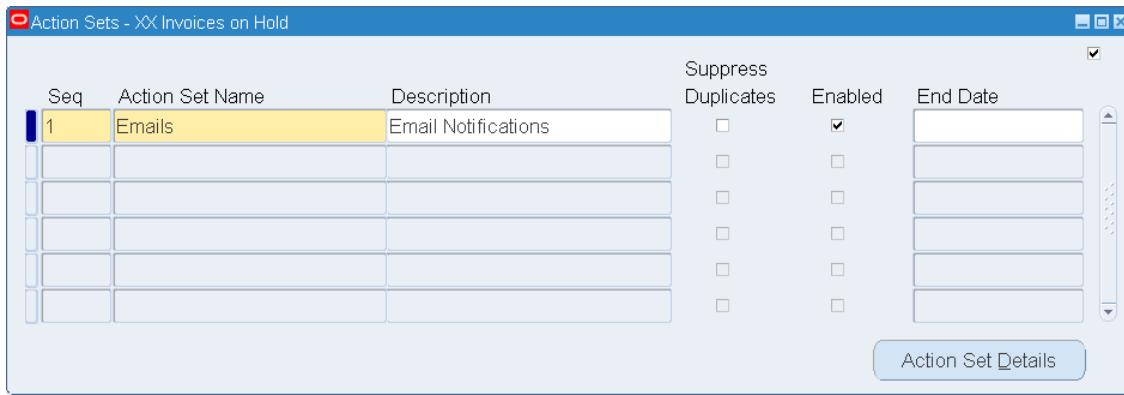
### 16. Close the Actions Window

## Defining Action Sets

### 17. (B) Action Sets, on the Alerts Window

- Define an Action Set according to the following table:

Seq	Action Set Name	Description
1	Emails	Email Notifications

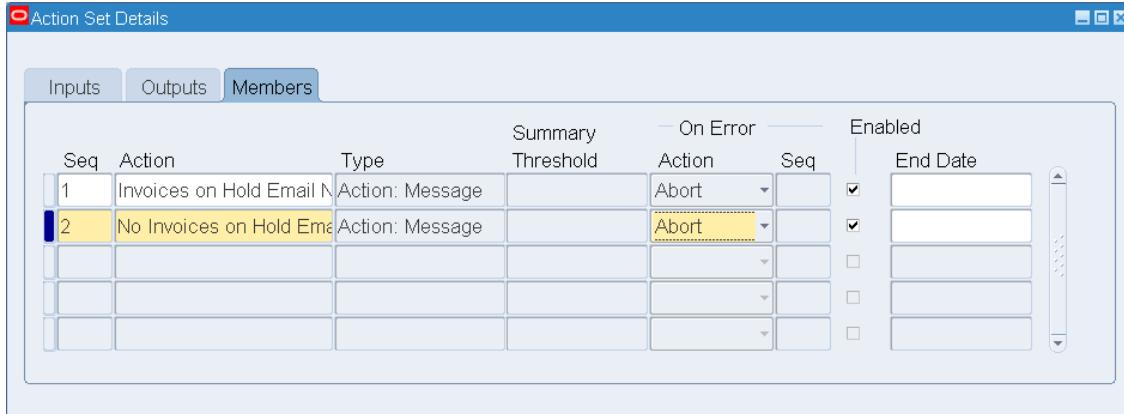


### Adding Actions to the Action Set

#### 18. (B) Action Set Details

- (T) Members
- Add actions according to the following table:

Seq	Action	On Error Action
1	Invoices on Hold Email Notification	Abort
2	No Invoices on Hold Email Notification	Abort



- Save

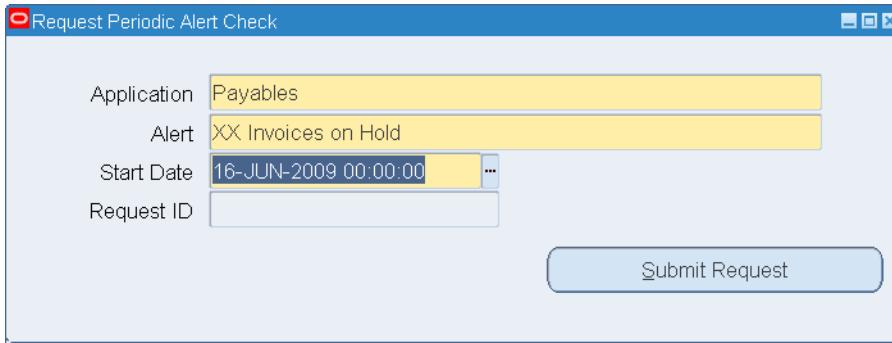
#### 19. Close all the other windows and return to the Navigator page

### Testing the Alert

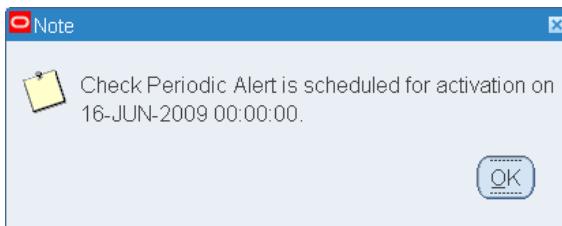
#### 20. (N) Request > Check to open the Request Periodic Alert Check window

#### 21. Enter the following information to test your alert:

- Application: Payables
- Alert: XX Invoices on Hold



**22. (B) Submit Request**

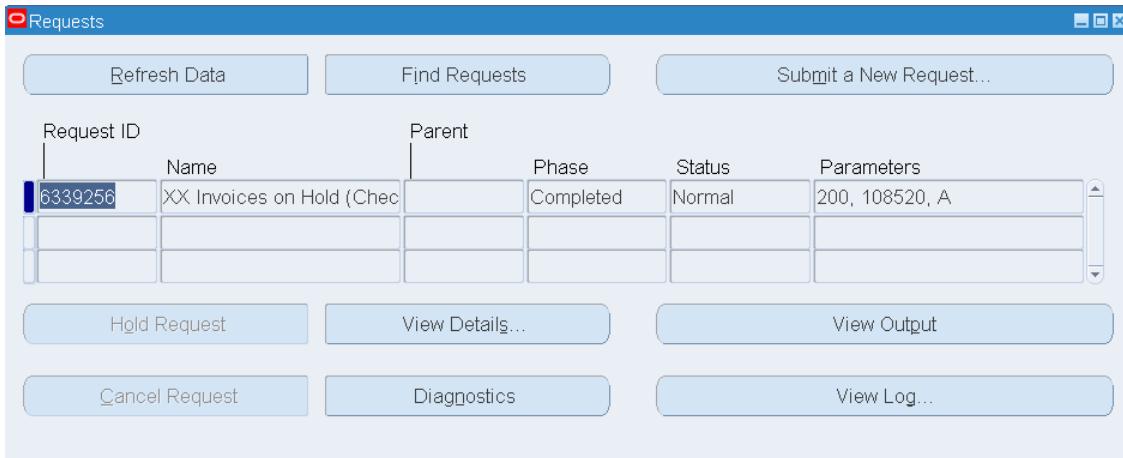


- (B) OK to acknowledge the message

**Monitoring the Request**

**23. (M) View > Requests**

- (B) Find
- (B) Refresh Data, until the request completes



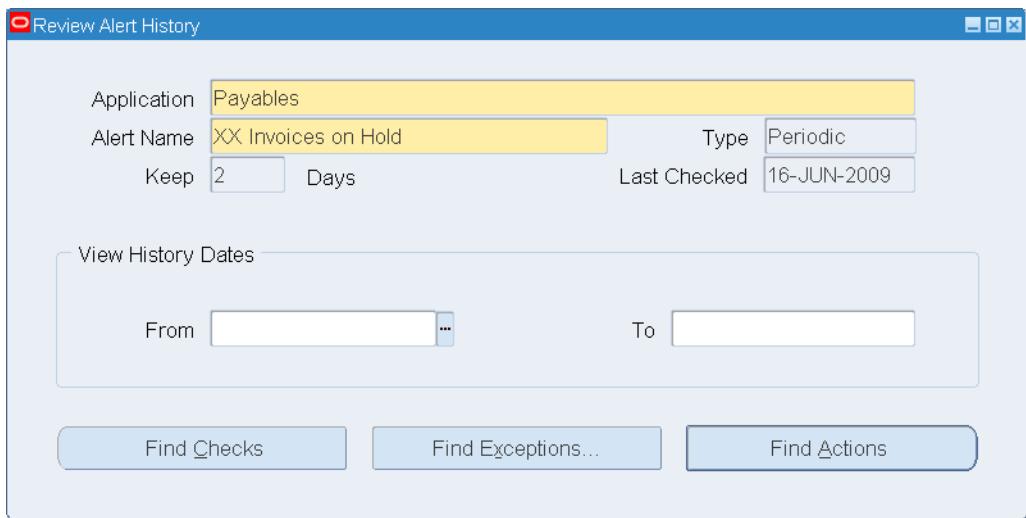
**24. Close all the other windows and return to the Navigator page**

**Reviewing Alert History**

**25. (N) History, to the Review Alert History Window**

**26. Enter the following information to review alert history:**

- Application: Payables
- Alert Name: XX Invoices on Hold



27. (B) Find Checks

Review Alert Checks - XX Invoices on Hold

Request					History	
Requestor	Date	Time	Request ID	Status	Purge Date	
XXEBSTUDENT	16-JUN-2009	11:24:24	6339256	Completed		

Action Set Checks

					Number of
Action Set Name	Oracle ID	Status	Exceptions	Actions	
Emails	APPS	Completed	16	1	

28. Close the Review Alert Checks window.

## **Viewing the Alert Action Log**

### 29. (B) Find Actions

- (B) Action Log



- (B) OK
30. Close all windows and return to the Navigator page.