

ERP- Oracle Apps

Lesson 2: Introduction to Oracle Apps

August 16, 2016

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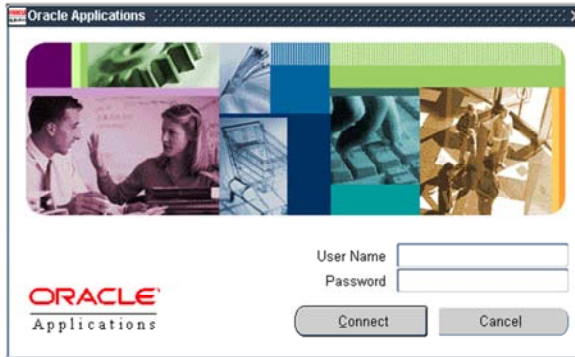
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Lesson Objectives

- **To understand the following topics:**
- Logon and off of Oracle Applications
 - Log on to Oracle Applications
 - Choose a responsibility
 - Use the Oracle Applications Navigator
 - Discuss the various components of an Oracle Applications form
 - Log off of Oracle Applications
 - Using forms
 - Using Reports



Logging On to Oracle Applications



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Starting Oracle Applications

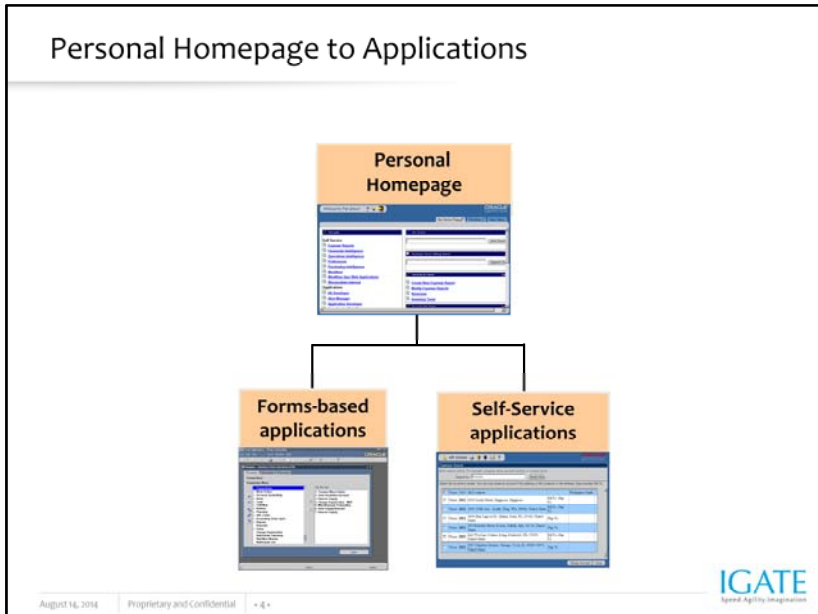
The first step in starting Oracle Applications is to enter the appropriate URL for your site in an Oracle Applications certified browser.

After starting Oracle Applications, the first window you see is the logon window.

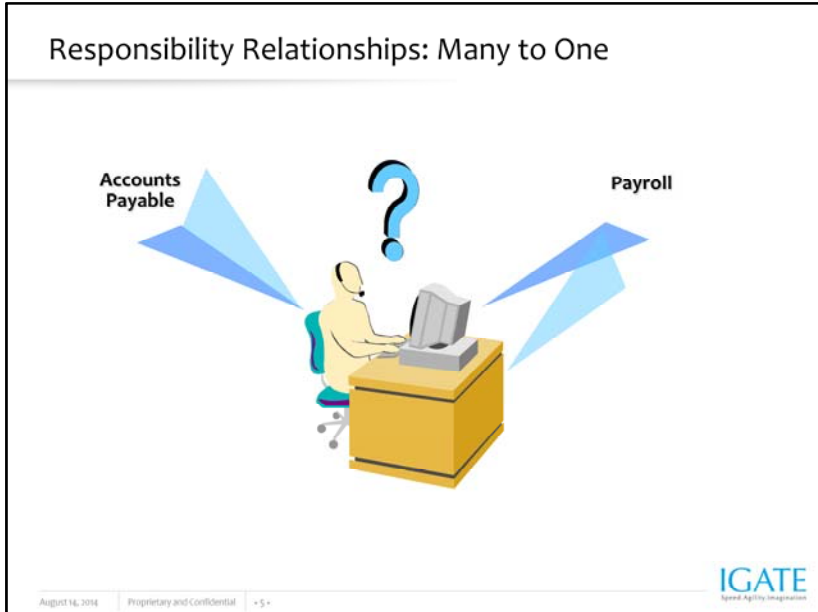
You need an Oracle Applications user name and password, also known as an Oracle Applications user name, to log on to Oracle Applications. It is different from the user name and password you use to log on to your computer. If you are not sure of your Oracle Applications user name and password, consult your system administrator.

Oracle Applications security is based on your Oracle Applications user name. Your user name connects you to your responsibilities, which controls your access to applications, functions, reports, and data.

(Help) Oracle Applications User's Guide > Getting Started > Starting Oracle Applications > Starting and Logging On

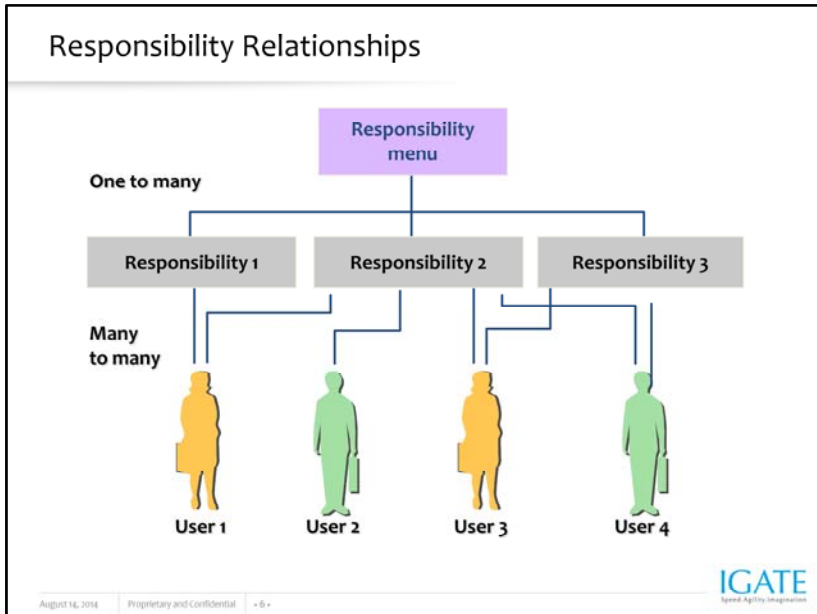


The Personal Homepage
After you log on to Oracle Applications, a Personal
Homepage is displayed.



Selecting a Responsibility

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



Responsibility Properties

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

- A specific application (or applications), such as Oracle General Ledger.

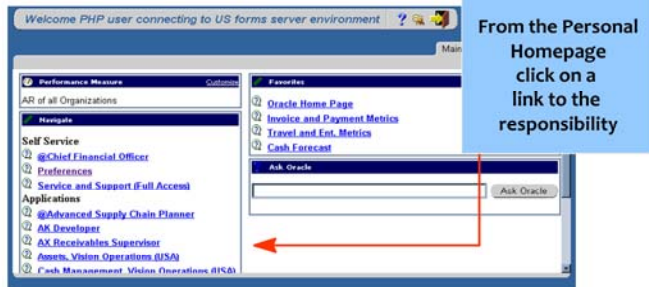
- A set of books, such as Vision Operations or Vision Corporation or an organization, such as Vision Services or Vision Distribution.

- A restricted list of windows to which you can navigate. For example, a responsibility may allow certain Oracle Financials users to enter invoices, but not to enter suppliers (vendors) or customers.

- A restricted list of functions you can perform. For example, two responsibilities may have access to the same window, but the window of one responsibility may have additional functional buttons.

- Reports in a specific application. Your system administrator can assign groups of reports to one or more responsibilities, so the responsibility you choose determines the reports that you can submit.

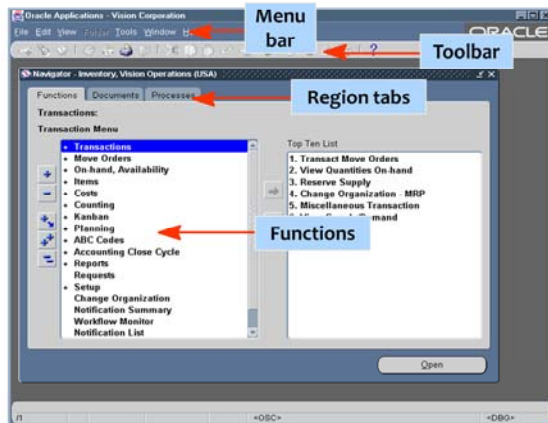
Choosing a Responsibility



Responsibility Assignments

Each user has at least one responsibility and several users can share the same responsibility. Your system administrator can assign you any of the standard responsibilities provided with Oracle Applications, or create custom responsibilities for you. If you have only one responsibility with one function, and only one region on your Personal Homepage, you will go directly to that function. Click on the underlined link in the Application section to select your responsibility.

Navigator



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Navigator Window

The Navigator window displays the name of the responsibility you select in the title bar.

Use this window to navigate to a form so you can perform a specific business flow. You can navigate to the forms that are displayed in a navigation list on the left side of the Navigator window.

You can click on the tabs to access different regions.

Navigator Region Tabs	
Region Tab	Description
Functions	Displays the forms that you can navigate to in a navigation list on the left-hand side of the Navigate window.
Documents	Displays links to documents that you have created.
Processes	Displays a visual map of a business process.

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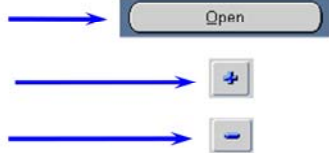
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Using Region Tabs
The Functions tab displays all of the applications functions that you can access for the responsibility that you selected.
If you have a document, such as a particular purchase order, invoice, or sales order that you want to access later, you can create a link to the document using the Navigator's Document feature. The Navigator's Document feature allows you to create as many links as you want and save them in the Documents region of the Navigator window. When you use a link to open a document, Oracle Applications opens the document in the appropriate form window. You can access the Document region using the tab control.
The Processes region of the Navigator (the "Process Navigator") automates business flows across Oracle Applications forms. It allows you to model and execute complex business processes through an easy-to-use, graphical user interface. The business processes enabled through the Process Navigator can cross product boundaries and include complete business cycles. The Process Navigator guides you step-by-step through each required function in a business process. In addition to providing a visual map of a business process, the Process Navigator can launch the appropriate Oracle Applications forms or standard reports at each step.

Expanding or Collapsing the Navigation List

➤ **Choose one of the following methods to expand an item to its next sublevel form:**

- Double-click the item.
- Select the item and choose Open.
- Select the item and choose Expand.



➤ **To collapse an expanded item, select the item and choose Collapse.**

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Using the Navigation List

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

Expanding or Collapsing Several Items

➤ **To expand or collapse several items at once, choose one of the following buttons:**

- Expand All Children expands all the sublevels of the currently selected item.
- Expand All expands all the sublevels of all expandable items in the navigation list.
- Collapse All collapses all currently expanded items in the navigation list.



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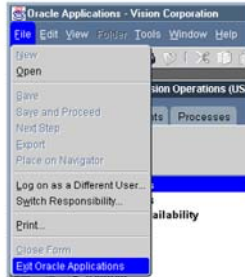
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Using the Navigation List (continued)

Click any of these buttons to expand or collapse several items listed on the Navigator Menu. These functions are also available in the Tools pulldown menu.

Logging Off of Oracle Applications

- (M) File > Exit Oracle Applications
- Use this method so that your username is cleared from system access



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Exiting Oracle Applications

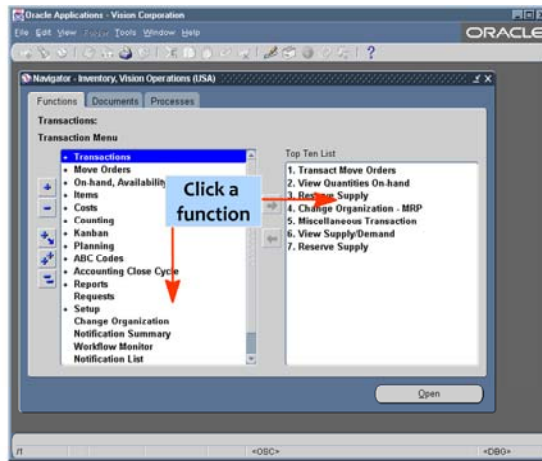
(M) File > Exit Oracle Applications, to log off the system. It is important to exit the system in this manner, rather than any other, as this is the only way to ensure that your user name is cleared from system access. You can also close the MDI window.

Demo : Login and Logoff

- Log on to Oracle Applications
- Choose the responsibility
- Exit Oracle Applications properly



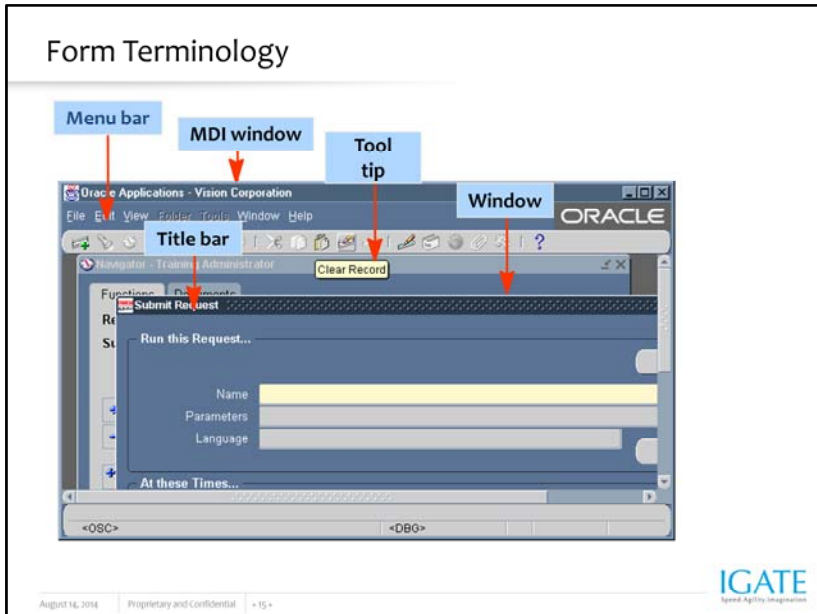
Using Forms and Reports Navigator Window



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The Navigator Window

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



Form Terminology

Oracle Applications Release 11i works specifically in a Web-enabled environment. It is important to understand the terminology of the components within an Oracle Applications form. Common terms used in Oracle Applications forms are listed below.

Menu bar—Use pull-down menus from this menu bar to navigate or perform actions within a form

Window—An area where the user interacts with an application (Many windows can be open at one time and you can access these “overlapping” windows to perform data entry or data search activities.)

Window title—Text in the title bar that indicates the name of the window, and usually, context information pertinent to the information in that window

MDI window—A master container window that houses all windows, toolbars, and application windows

Tool tips—Iconic bubble help that you can use to determine the function of a button on the toolbar

Form Terminology (Contd...)

The screenshot shows an Oracle Forms window titled "Region". The window contains several UI elements:

- Region:** The entire window frame is labeled as a "Region".
- Region tab:** A tab labeled "Region tab" is highlighted.
- Field:** A text input field for "Name" is labeled as a "Field".
- Field:** A dropdown menu for "Frequency" (set to "On Demand") is labeled as a "Field".
- Field:** A text input field for "Check Interval" is labeled as a "Field".
- Button:** A large yellow rectangular area containing the SQL statement "SELECT COLUMN_NAME INTO &OUTPUT1 FROM TABLE_NAME" is labeled as a "Button".
- Buttons:** Several buttons are visible on the right side: "Import...", "Export...", "Verify", "Run", and "Alert Details".
- Buttons:** At the bottom, there are buttons for "Actions", "Action Sets", "Response Sets", and "Alert Details".

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Form Terminology (continued)

Region—A logical grouping of fields set apart from other fields by a box outline

Region tab—A collection of regions that occupy the same space in a window where only one region can be displayed at a time

Field—An area in a window that displays data or enables you to enter data

Button—A graphic element that initiates a predefined action when you click it

Form Terminology (Contd...)

The screenshot shows an Oracle Forms window titled "Option Clear amounts". The window contains several sections:

- Option button:** A label with an arrow pointing to a radio button group for "Primary Balance Type" (Actual, Budget, Encumbrance).
- Modal window:** A label with an arrow pointing to a small error dialog box in the center that says "Error: Please query an account before proceeding." with an "OK" button.
- Block:** A label with an arrow pointing to a section of the form containing "Currency" and "Currency Type" options.
- Scrolling region:** A label with an arrow pointing to a scroll bar on the right side of the "Accounts" section.

 Other visible fields include "From Jul.02", "To Jul.02", "Summary Template", and "Description". At the bottom are buttons for "Show Balances" and "Show Journal Details".

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Form Terminology (continued)

Option button—A button that indicates an individual selection is available within an option group

Modal window—A window that requires you to act on its content before continuing

Scrolling region—A region, containing a scroll bar, in which to view other fields

Block—An area of information relative to a specific business function or entity

Form Terminology (Contd...)

The screenshot shows the Oracle Bills of Material (AC1) form. Annotations with red arrows point to specific UI elements:

- LOV icon:** Points to a small icon next to the 'Item' field.
- Record or row:** Points to a row in the table below the tabs.
- Poplist:** Points to the 'Display' dropdown menu.
- Check box:** Points to the 'Implemented Only' checkbox.

The form includes fields for Item, Alternate, Revision, Date (17/MAY/2001 14:29:26), and a 'Display' dropdown set to 'Future and Current'. There are tabs for 'Unit Effectivity', 'ECO', 'Component Details', 'Material Control', 'Order Entry', and 'Shipping'. A table with columns for 'Component', 'UOM', and 'Quantity' is visible. At the bottom, there are buttons for 'Substitutes', 'Designators', 'Elements', 'Bill Details', and 'Revision'.

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Form Terminology (continued)

Record or Row—A set of one or more related data items from a table or view that are grouped for processing

Check box—A box in which you can toggle between an on/off or yes/no state for a particular value

LOV icon—An icon that you can click to display a list of values (LOV) for the current field

Poplist—A poplist lets you choose a single value from a short list

Field Colors

Field Color	Description
White	Allow data entry
White with green text	Indicate drill-down capability
Yellow	Require data entry
Gray with black text	Are display only
Blue	Indicate fields to use in Query-Enter mode

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What Field Colors Indicate

Each block contains fields you use to enter, view, update, or delete information. A field prompt describes each field by telling you what kind of information appears in the field or what kind of information you should enter in the field. Fields are color coded to indicate their type as follows:

White Fields—allow data entry

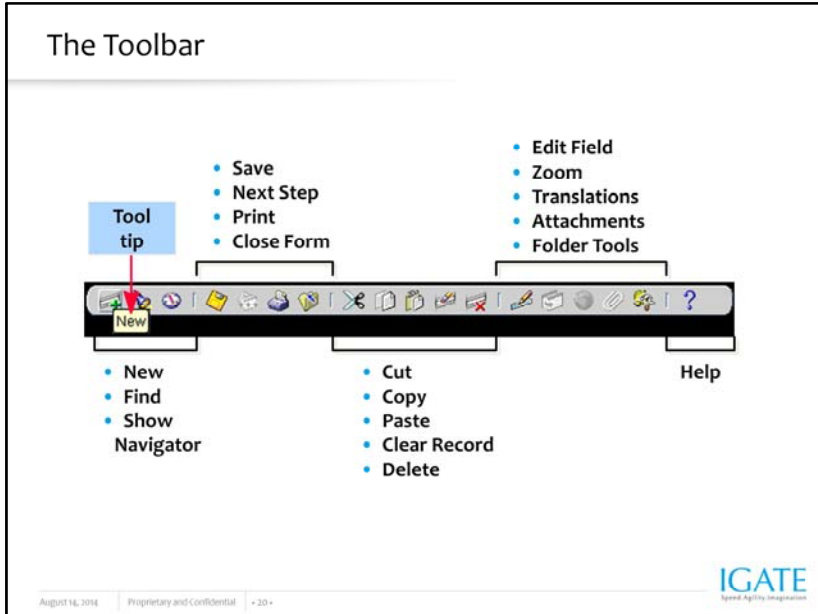
White Fields with Green Text—indicate drill-down capability

Yellow Fields—require data entry

Gray Fields with Black Text—are display-only

Blue Fields—indicate fields to use in Query-Enter mode

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



Using the Toolbar

The toolbar is a collection of iconic buttons, where each button performs a specific action when you choose it. Each toolbar button replicates a commonly-used menu bar item. Depending on the context of the current field or window, a toolbar button can be enabled or disabled. You can display help or a tool tip for an enabled toolbar button by holding your mouse over the button.



Creating a New Record

When you add a new record to the database, Oracle Applications will move the current record down and insert a new blank row. You add a new record by entering information into this blank row. In most screens you are automatically on a new record when the form is opened, so you can just start entering the information.

After you finish entering the data for your new record, you must remember to click Save so that your newly added information will be written to the database. If you enter five new blank rows of information but do not click Save when you are finished, none of this newly added information will be updated in the database (the system will prompt you to save before you exit).

How to Create a New Record

(M) File > New. Or, click the New icon on the toolbar.

You can also press the down arrow on your keyboard to insert a blank row, if you are not in a table on the form.

Additionally, some applications have a button labeled New, and clicking it will insert a blank row.

Type the new information into the blank row.

(M) File > Save or click the Save icon to save the new record.



Deleting a Record from the Database

If you want to delete a record from the database, you must first display the record on your form and then click the Delete icon.

Note: This option is not always available. For example, in Oracle Applications you cannot delete a customer once they have been entered; you can only inactivate their status. If you do not Save this new change to the database, the record is not truly deleted (the system will prompt you to save before you exit).

How to Delete a Record

(M) Edit > Delete, or click the Delete icon.

(M) File > Save or click the Save icon.

Concurrent Processing

- Every Oracle Applications product contains reports and programs that are specific to that product
- A report generates a summary or detail presentation of Oracle Applications information, whereas a program can perform a function
- The reports and programs you have access to are defined by the responsibility you use

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For example, as an Oracle Receivables user, you may be able to run a report to create invoices. Or in your Oracle General Ledger application, your responsibility may allow you to run a program to post journal entries.

Concurrent Processing (Contd...)

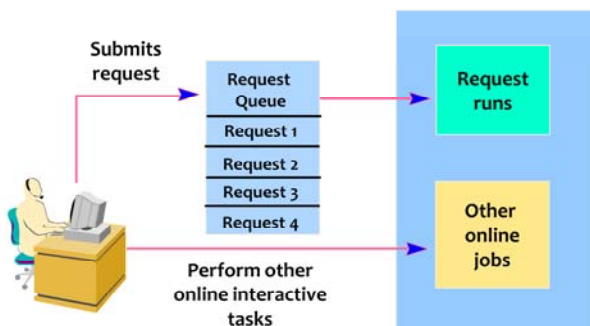
- **Oracle Applications provides you with two features: *Concurrent Processing* and *Standard Request Submission***
- **Concurrent processing**
 - Is a feature that allows you to run a non-interactive, data-dependent function, such as a report or program, simultaneously with online operations
 - With concurrent processing, you can complete non-interactive tasks without interfering with the interactive work you perform at your computer

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An example of concurrent processing occurs when you use the Post Journals window in your Oracle General Ledger application. Once you specify the journal batches to post and choose the Post button, your Oracle General Ledger application uses concurrent processing to post the journal batch entries without further involvement from you. Meanwhile, your computer is still available for you to continue doing other work in Oracle Applications. Oracle Applications runs all of its reports and programs as concurrent processes.

Concurrent Processing (Contd...)



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Standard Request Submission

➤ Standard Request Submission

- Helps to run the reports and programs that are a part of your responsibility
- Is a feature that works with concurrent processing
- Provides a set of windows to run, submit and control over the output of reports and programs

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Standard Request Submission

To help you run the reports and programs that are a part of your responsibility.

It is a feature that works with concurrent processing to provide a common interface for running your Oracle Applications reports and programs.

Standard Request Submission provides you with a set of windows for running reports and programs and a set of windows for creating groups of reports and programs to run together.

These windows give you control over the submission and output of your reports and programs.

Uses

- **You can Concurrent processing helps you satisfy the following business needs**
 - Keep working at your computer while running data-dependent reports and programs
 - Fully use the capacity of your hardware by executing many application tasks at once
- **Standard Request Submission lets you satisfy a related set of business needs**
 - You can use a standard interface to run your programs and reports
 - Control access to different programs and reports

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Pass parameters from your environment to your reports and programs.

- View report output online.
- Create and run sets of reports and programs.
- Automatically run programs, reports, or request sets at specific time intervals.
- Specify whether reports and programs in a request set run sequentially or simultaneously.
- Specify whether to continue with a request set if a report or program in a sequential set fails.
- Specify alternative requests to run based on the completion status of previously run requests in a request set.
- View a log file that summarizes the completion information about all the reports and programs in a request set.

Basic Definitions

➤ Concurrent Program

- A concurrent program is a program that does not require continued interaction on your part to perform a specific task. For example, a concurrent program may be a program written to create a report, or to post a batch of general ledger journal entries

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Basic Definitions (Contd...)

➤ Concurrent Process

- A concurrent process is an instance of a running concurrent program
- Each time a concurrent manager receives a request and runs a concurrent program, it creates a new concurrent process. A concurrent process can run simultaneously with other concurrent processes (and other activities on your computer)

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Basic Definitions (Contd...)

➤ **Concurrent Request**

- A concurrent request is a request that you submit to run a concurrent program as a concurrent process. You issue a concurrent request when you submit a report or program to run using Standard Request Submission or when you choose an action button in a product-specific submission window

➤ **Concurrent Manager**

- A concurrent manager is a component of concurrent processing that monitors and runs tasks without tying up your computer

Basic Definitions (Contd...)

➤ Report

- A report is an organized presentation of specific Oracle Applications information. You can view a report online, or send it to a printer. The content of a report can range from summary information to a complete listing of values. Reports run as concurrent programs in Oracle Applications

Basic Definitions (Contd...)

➤ Parameter

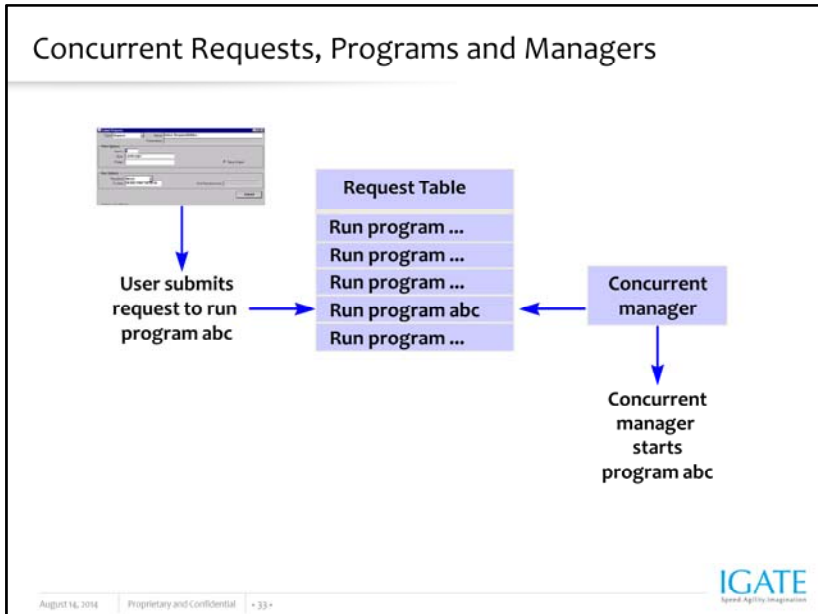
- In Standard Request Submission, a parameter is a report variable whose value you can change each time you run a report. For example, you might run an audit report that requires you to enter an audit date each time you run the report. The audit date is a parameter for the report

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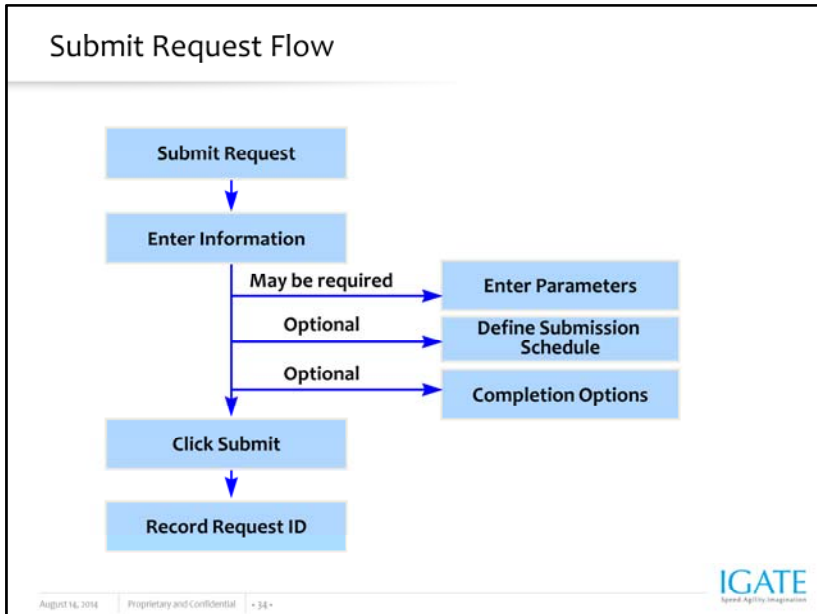
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Concurrent processing allows long-running, data-intensive programs to run simultaneously with online operations. Oracle Applications programs can run concurrently with each other as well as with other programs; they are referred to as concurrent programs.

Requests to run Oracle Applications programs—for example, to run an Oracle General Ledger report—are concurrent requests. Each concurrent request inserts a row into a database table maintained by the Oracle Application Object Library.

Concurrent managers read requests from the requests table and start concurrent programs.



Using Standard Request Submission (SRS)

Using Standard Request Submission gives you control over how you can run your requests and request sets.

There are three elements involved in submitting a request: selecting the request or request set to be submitted, defining a submission schedule, and providing completion options.

Defining a schedule can be as simple as submitting As Soon as Possible, or it can involve using a more complex schedule that you define when you first submit your request. This schedule can then be used for other requests in the future. Completion options enable you to deliver notification to others using Oracle Workflow, as well as specifying which printers and how many copies of the output you want to produce for each request.

You can submit as many requests as you like from the Submit Request window. You can even submit a request more than once if you want to run the same request with different parameter values.

Submit Request Flow (Contd..)

Submit a New Request

What type of request do you want to run?

☒ **Single Request**
This allows you to submit

☐ **Request Set**
This allows you to submit requests.

OK

Run this Request...

Name Copy...

Parameters Copy...

Language Languages...

At these Times...

Run the Job As Soon as Possible Schedule...

Upon Completion...

☒ Save all Output Files

Notify Options...

Print to

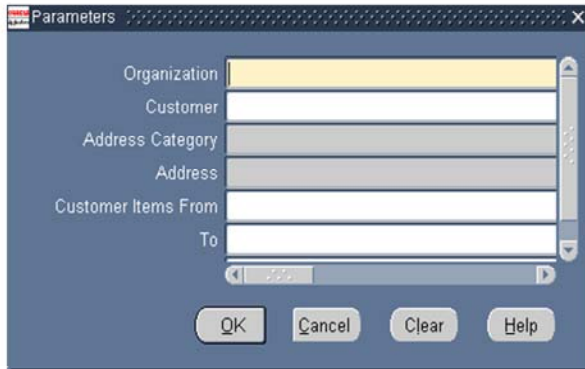
Help Submit Cancel

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Navigate to the Submit a New Request Window:
Check the option for Single Request or Request Set.
Click OK.

Use the Copy a Prior Request button to use a previously entered request submission Or Select the name of the request that you want to run from the list of values.

Parameter Window



The screenshot shows a window titled "Parameters" with a close button (X) in the top right corner. The window contains several input fields with labels to their left: "Organization" (highlighted in yellow), "Customer", "Address Category", "Address", "Customer Items From", and "To". Below these fields is a horizontal scrollbar. At the bottom of the window are four buttons: "OK", "Cancel", "Clear", and "Help".

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A Parameters window automatically appears if you select a request that requires parameter values.

The Prompts in the Parameters window are specific to the request that you select.

The parameters you enter are concatenated and displayed in the Parameters field of the Submit Requests window.

Request Id

Find Requests

- My Completed Requests
- My Requests In Progress
- All My Requests
- Specific Requests

Request ID
Name
Date Submitted
Date Completed
Status
Phase
Requestor

☒ Include Request Set Stages in Query

Order By: Request ID

Submit a New Request... Clear Find

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Oracle Applications assigns a request ID to each request submission so that you can identify your request. Use the request ID to query for your request output in the Requests window.

Oracle Applications assigns a new request ID to each resubmission of a request and displays the request ID of the previous request in the log file.

Use the Requests Window to View and Change Requests

Find Requests

- My Completed Requests
- My Requests In Progress
- All My Requests
- Specific Requests

Request ID
Name
Date Submitted
Date Completed
Status
Phase
Requestor

☒ Include Request Set Stages in Query

Order By Request ID

Submit a New Request... Clear Find

Use the Requests window to perform the following functions:

- View all submitted concurrent requests
- Check the status of requests
- Change aspects of a request's processing options
- Diagnose Errors
- Find the position of a request in the queues of available concurrent managers

Using the Requests Window

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Use the various buttons to perform tasks related to concurrent processing:

Refresh Data - Requeries the lines in the request table.

Find Requests - Displays the Find Request window to perform a search.

Submit a New Request... - Displays the Submit a New Request window.

Hold Request - Puts a request on hold if the request has not started running.

Cancel Request - Cancels a request

Demo

- Open/Close and save form
- Submit a concurrent request and see the output (Report)



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Summary

- In this lesson, you should have learned how to:
- Log on to Oracle Applications
- Log off of Oracle Applications
- Opening a form
- Form terminology and characteristics
- Running concurrent program and get output



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Review – Questions

- **Question 1: Parameter window is always mandatory while submitting concurrent program?**
 - True/False
- **Question 2: Oracle Applications assigns a ____ to each request submission so that you can identify your request.**



Review – Questions

The screenshot shows the Oracle Bills of Material (AC1) form. The form is titled "Bills of Material (AC1)". It has a header section with fields for Item, Alternate, Revision, Date (17/MAY/2001 14:29:26), and UOM. Below the header is a section for Display (Future and Current) and a checkbox for Supplemented Only. The main body of the form is divided into tabs: Effectivity, ECO, Component Details, Material Control, Order Entry, and Shipping. The Component Details tab is active, showing a table with columns for Component, Revision, UOM, Quantity, and Ent. There are five numbered boxes with red arrows pointing to specific fields: 1. Points to the Item field. 2. Points to the Component field in the table. 3. Points to the Revision field in the table. 4. Points to the UOM field in the table. 5. Points to the Supplemented Only checkbox.



Practice Instructions

Label the numbered boxes in the slide.

Review – Questions

The screenshot shows the 'Status of Material (AC1)' form in Oracle. It includes fields for Item, Alternate, Revision, Date (17/MAY/2001 14:29:26), and Display (Future and Current). There are tabs for Main, Date Effectivity, Unit Effectivity, ECO, Component Details, Material Control, Order Entry, and Shipping. A table with columns for Operation Seq, Component, Revision, UOM, Quantity, and Ent is visible. At the bottom are buttons for Substitutes, Designators, Elements, Bill Details, and Revision. Red arrows point to specific areas labeled 1 through 5.



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Instructor Note

Review the answers to the labeling practice