Oracle® Fusion Applications Common User Guide

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Preface

This Preface introduces the guides, online help, and other information sources available to help you more effectively use Oracle Fusion Applications.

Oracle Fusion Applications Help

You can access Oracle Fusion Applications Help for the current page, section, activity, or task by clicking the help icon. The following figure depicts the help icon.

You can add custom help files to replace or supplement the provided content. Each release update includes new help content to ensure you have access to the latest information. Patching does not affect your custom help content.

Oracle Fusion Applications Guides

Oracle Fusion Applications guides are a structured collection of the help topics, examples, and FAQs from the help system packaged for easy download and offline reference, and sequenced to facilitate learning. You can access the guides from the **Guides** menu in the global area at the top of Oracle Fusion Applications Help pages.

Note
The **Guides** menu also provides access to the business process models on which Oracle Fusion Applications is based.

Guides are designed for specific audiences:

- **User Guides** address the tasks in one or more business processes. They are intended for users who perform these tasks, and managers looking for an overview of the business processes. They are organized by the business process activities and tasks.
- **Implementation Guides** address the tasks required to set up an offering, or selected features of an offering. They are intended for implementors. They are organized to follow the task list sequence of the offerings, as displayed within the Setup and Maintenance work area provided by Oracle Fusion Functional Setup Manager.
- **Concept Guides** explain the key concepts and decisions for a specific area of functionality. They are intended for decision makers, such as chief financial officers, financial analysts, and implementation consultants. They are organized by the logical flow of features and functions.

- **Security Reference Manuals** describe the predefined data that is included in the security reference implementation for one offering. They are intended for implementors, security administrators, and auditors. They are organized by role.

These guides cover specific business processes and offerings. Common areas are addressed in the guides listed in the following table.

Guide	Intended Audience	Purpose
Common User Guide	All users	Explains tasks performed by most users.
Common Implementation Guide	Implementors	Explains tasks within the Define Common Applications Configuration task list, which is included in all offerings.
Information Technology Management, Implement Applications Guide	Implementors	Explains how to use Oracle Fusion Functional Setup Manager to plan, manage, and track your implementation projects, migrate setup data, and validate implementations.
Technical Guides	System administrators, application developers, and technical members of implementation teams	Explain how to install, patch, administer, and customize Oracle Fusion Applications.

For guides that are not available from the Guides menu, go to Oracle Technology Network at http://www.oracle.com/technetwork/indexes/documentation.

Other Information Sources

My Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Use the My Oracle Support Knowledge Browser to find documents for a product area. You can search for release-specific information, such as patches, alerts, white papers, and troubleshooting tips. Other services include health checks, guided lifecycle advice, and direct contact with industry experts through the My Oracle Support Community.

Oracle Enterprise Repository for Oracle Fusion Applications

Oracle Enterprise Repository for Oracle Fusion Applications provides visibility into service-oriented architecture assets to help you manage the lifecycle of your software from planning through implementation, testing, production, and changes. In Oracle Fusion Applications, you can use the Oracle Enterprise Repository for Oracle Fusion Applications at http://fusionappsoer.oracle.com for:

- Technical information about integrating with other applications, including services, operations, composites, events, and integration tables. The classification scheme shows the scenarios in which you use the assets, and includes diagrams, schematics, and links to other technical documentation.
- Publishing other technical information such as reusable components, policies, architecture diagrams, and topology diagrams.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/us/corporate/accessibility/index.html.

Comments and Suggestions

Your comments are important to us. We encourage you to send us feedback about Oracle Fusion Applications Help and guides. Please send your suggestions to oracle_fusion_applications_help_ww_grp@oracle.com. You can use the **Send Feedback to Oracle** link in the footer of Oracle Fusion Applications Help.

1

Overview

Using Oracle Fusion Applications: Overview

Oracle Fusion Applications is a complete set of applications for performing business tasks across your enterprise. These applications are based on business process models. Many of the common features and functionality are available to all users, while others are available in select pages or flows.

Navigation

After you sign in, you land in the home page of Oracle Fusion Applications, which includes the Welcome dashboard and other dashboards relevant to your roles. Use these dashboards and the global area, specifically the set of menus including **Navigator**, as starting points for navigation. One navigation feature is the Watchlist, which provides a set of shortcuts to items that you want to track or that require your attention.

Search

Searches are available throughout the applications and help you find the business objects that you want to view or manage. While most searches are specific to one or more business objects, the search in the global area lets you search in a broader scope.

Data Management

Aside from creating, editing, and otherwise managing business objects in the application pages, you can also work in a spreadsheet where available. You create or edit records in a Microsoft Excel file and upload the records back into Oracle Fusion Applications.

Notifications and Approvals

You receive notifications as part of workflows when there is a task that requires your attention or action, for example an expense report pending your approval.

Collaboration Features

Collaboration features are tools, for example tags and discussions, that let you coordinate your activities and share information with others. You can use some of these features for social networking within your enterprise.

Processes, Reports, Analytics

Use processes, reports, and analytics to process data in a batch or to display information in a way that meets business needs or aids in decision-making. You can generate statutory reports, review business intelligence analyses, and so on.

Personalization

Personalization involves changes you make to the page that apply only to you, for example hiding specific sections or table columns, or adding regions to a dashboard. You can also use preferences to personalize the application for yourself, for example by setting language preferences. Use the **Personalization** menu in the global area to personalize pages or set preferences.

Help

Aside from the help that you see embedded in the application, for example hint text, you can also use Oracle Fusion Applications Help to find the information that you need regarding what you are working on. You can access Oracle Fusion Applications Help through help windows or the **Help** link in the global area.

Troubleshooting

When you encounter an issue that you cannot resolve by consulting Oracle Fusion Applications Help, there are diagnostic tests and other troubleshooting features available to you or your help desk. You can access some of these features from the **Help** link in the global area.

Accessibility

Oracle Fusion Applications provides comparable access to persons with disabilities, with features such as keyboard-only support, the ability to alter font sizes and screen colors, and interoperability with assistive technology such as screen readers. You can enable some of these features by setting accessibility preferences, which you access from the Accessibility link in the global area or from preferences.

Business Process Management: Explained

Business Process Management (BPM) enables organizations to either optimize their business processes or adapt them to new organizational needs. Business process modeling is one important element of BPM. Oracle Fusion Applications is based on business process models that are presented in a five-level hierarchy, which illustrates the process from a high-level, conceptual view to a low-level, application specific view. For more information on BPM, including diagrams of the models, go to Oracle Fusion Applications Help and select **Guides** - **Business Process Models** .

Business Process Modeling Levels

The levels of the business process modeling hierarchy are: industry (L0), business process area (L1), business process (L2), activity (L3), and tasks (L4). L1 through L3 are business-driven and independent of any specific implementation in an application, while L4 is influenced by Oracle Fusion Applications products and functionality. For example, the model includes Financial Control and Reporting as an L1, Close Accounting Period as an L2, and Close Ledger as an L3. Under the Close Ledger activity, there are L4 tasks such as Manage Accounting Periods and Create Balance Sheet Closing Journals, which align with functionality available from Oracle Fusion Applications.

BPM in Oracle Fusion Applications

Oracle Fusion Applications is organized around these hierarchy levels and flows, which puts focus on the activities and tasks that you need to perform. The navigation, user interface, parts of security, and other aspects of the application are all influenced by, if not directly based on, the business process modeling levels. For example, in Oracle Fusion Applications Help, the hierarchy in the Search by Business Process pane corresponds to L1 through L3. Each help file is assigned to at least one L3 activity. The primary activity, along with the corresponding business process area and business process, is displayed as breadcrumbs for a help file when you see it in search results or view the file content.

2

Navigation

Watchlist

Adding, Displaying, and Renaming Watchlist Items: Points to Consider

Though the Watchlist comes with predefined categories and items, you can add or remove custom items to and from your own watchlist, determine which predefined and custom items are displayed or hidden, and rename your custom items.

Adding or Removing Items

To add a Watchlist item to your own watchlist, create an appropriate saved search on a search page with the **Manage Watchlist** button or menu item enabled. For example, if you want your watchlist to track corporate card transactions that arrived in the last week, then create a saved search for corporate card transactions with the appropriate search criteria. Use the button or menu item to open the Manage Watchlist dialog box, and select the saved search that you created.

You can include any saved search that you created on this search page as a Watchlist item, and it would be available to be displayed in your own watchlist only. All saved searches from the same search page appear in the Watchlist under one predefined Watchlist category.

To remove a Watchlist item based on a saved search, you can deselect it in the Manage Watchlist dialog box. If you delete the saved search itself, then immediately after doing so you should also deselect it from the Manage Watchlist dialog box. Otherwise, the deleted saved search will still appear in the dialog box, and the corresponding Watchlist item as well in your watchlist, until the next refresh of that Watchlist item. The refresh might be hours later, depending on setup.

Displaying or Hiding Items

Your Watchlist preferences contain all the predefined categories and items available to you, as well as any saved searches that you selected to use in the

Watchlist. From this list, you can specify which categories and items to display in your own watchlist. To access your Watchlist preferences, go to the global area and select **Personalization** - **Set Preferences** - **Watchlist** .

From the subset you selected to display, you can also choose to hide items that have no results found. Whenever the Watchlist refreshes, if there are no records that meet the criteria of the Watchlist item, then that item is not displayed in your watchlist.

Renaming Items

You cannot rename predefined Watchlist items or items based on your saved searches. You can ask your administrator to edit predefined Watchlist item names, but the changes will apply to all users.

For Watchlist items based on your saved searches, the saved search name is displayed as the Watchlist item name. You can rename the saved search using the Personalize Saved Searches dialog box from the corresponding search page. The Watchlist item name is then automatically updated the next time that the Watchlist is refreshed.

FAQs for Watchlist

What's the difference between the Watchlist and the Worklist?

The Watchlist feature provides a set of shortcuts to items that you want to track or that require your attention. Use the Watchlist to see a count for each item and to navigate to the relevant work area where you can view or perform tasks on the item. For example, a Watchlist item is for expense reports awaiting submission. You can see how many expense reports you have created but not yet submitted, and click the Watchlist item link to navigate to the work area where these reports appear.

The Worklist feature presents workflow tasks that require your approval or other action, as well as notifications for you to view. Use the Worklist to manage your tasks, access their details, or take appropriate action. For example, some managers might see approval tasks for invoices, and select a particular task to approve, reject, or otherwise act on the corresponding invoice.

Note

In some cases, you can use either the Watchlist or Worklist to perform the same task. For example, managers can also use the Watchlist item for invoices requiring their approval to see all such invoices and then select the one to act on.

Why are some items not displayed in my watchlist?

Your Watchlist preferences determine what actually appears in your watchlist. You may have set your preferences to hide specific items or all items with no results found. If all items within a category are hidden due to what you set in preferences, then the category would also be hidden. To review your preferences, go to the global area and select **Personalization** - **Set Preferences** - **Watchlist** .

When you select a saved search to be included as a Watchlist item in the Manage Watchlist dialog box, you determine that the item is available for the Watchlist, not that it is necessarily displayed. So even though your saved search is included in the Watchlist, it could be hidden due to your Watchlist preferences.

It is also possible that:

- You deselected saved searches in the Manage Watchlist dialog box, or deleted the saved searches.
- Your administrator has disabled specific predefined Watchlist items or categories for all users.
- You administrator has disabled using saved searches from specific search pages as Watchlist items.
- You no longer have access to tasks or pages that were previously available to you.

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

Why is the last refreshed time of the Watchlist region different from that of individual Watchlist items?

The last refresh time for the entire Watchlist is displayed at the top of the Watchlist region. Each Watchlist item, however, is defined with a refresh interval, which your administrator sets. When you refresh the Watchlist, the count is refreshed for an item only if the time since the last refresh of that item is greater than the defined refresh interval.

For example, a Watchlist item with a refresh interval of ten minutes was last refreshed at 1:00. If you refresh the Watchlist at 1:07, the last refreshed time for the item remains at 1:00 because it has not been ten minutes since its last refresh. Your refresh, however, may have updated the count for other items, and 1:07 is displayed as the last refreshed time for the entire Watchlist region.

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

Watchlist item counts are refreshed periodically for optimized application performance. Relevant records could have been created, edited, or deleted since the last time the Watchlist item count was refreshed.

3 Search

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

The search in the global area is always available to you and lets you search for various objects in all categories that are relevant to you and your roles. Use this search to quickly find something based on keywords, especially if you are searching across different objects and do not have more specific criteria. The global area search is based on Oracle Fusion Applications Search.

Searches in the regional area or local area, where available, let you search for specific objects or a related group of objects. Use the regional area search to quickly search based on one or few criteria, but use the local area searches to enter more specific search criteria. The local area search is also the one most likely to find the most up-to-date results, for example records that were very recently created.

Note

Running a search in the regional area refreshes the local area and clears Query By Example values, if any.

FAQs for Oracle Fusion Applications Search

Why is Oracle Fusion Applications Search not providing expected search results?

Results from Oracle Fusion Applications Search are not real-time, but based on indexes that are refreshed with a frequency that your administrator determines. Until indexes are refreshed, newly created records may not be searchable, deleted records may still appear, and attribute values may be outdated.

It is possible that the object you are searching for is not included in Oracle Fusion Applications Search. If applicable, use the search in the local area if you know which work area to go to, and especially if you want to see the latest information in the search results.

Finally, make sure that you are correctly using wildcards, operators, and so on when you enter keywords.

How can I save a search in the global area?

Run the search that you want to save in the global area, and save the search from the Oracle Fusion Applications Search dialog box. You are not saving the search results themselves, but the keywords, categories, and filters applied to the search results at the time you create the saved search. When you later use this saved search, you are likely to get different search results because records could have been added, edited, or deleted in the meantime.

How can I edit and delete saved searches in the global area?

In the global area, click the **Saved Searches** icon and select **Personalize** to rename or delete saved searches. To update search criteria, run the existing saved search, update keywords, categories, or filters in the Oracle Fusion Applications

Search dialog box, run the search with the updated values, and save the search using the same name to overwrite the existing saved search.

Search in Local and Regional Areas

Search Rules: Examples

There are various rules that apply to search, for example wildcards that you can use. These rules apply to regular searches, for example the ones you see in pages in the local area, and not to searches based on Oracle Fusion Applications Search, for example the search in the global area. The following scenarios provide examples of search criteria entered according to search rules and the results of the search.

Search Rules

Aside from Oracle Fusion Applications Search, there are various search technologies in Oracle Fusion Applications. Not all the rules apply to all types of searches, and in some cases the search rule might be disabled for performance or other reasons. In most cases, the search fields are not case sensitive.

This table describes each search rule, what you enter as search criterion to use the rule, and an example of how the rule is used. The Description and Example of Results columns can present more than one possible behavior, to reflect how different search technologies work.

Search Rule	What You Enter	Description	Example of Search Criterion	Example of Results
Number	One number	Results include the exact number as a whole. This **equals** operation is the default for search criteria with number values.	10	Records with the number **10**, but not **100** or **210**.
Date	One date	Results include the exact date. This **equals** operation is the default for search criteria with date values.	12-Oct-2012	Records with an October 12, 2012 date.
Single Word	One word	• Results include the word, or the word at the start of a larger word. This **starts with** operation is the default for search criteria with character values. • Results include the exact word.	report	• Records with the word **report**, or words such as **reports** and **reporting**. • Records with the word **report**.

Phrase	Multiple words, without quotation marks	• Results include the exact phrase, or the words as a part of a larger phrase. • Results include all of the exact words in any order.	expense report	• Records with the exact phrase **expense report**, or phrases such as **expense reports** and **expense reporting**. • Records with both the words **expense** and **report**, for example **report on the expense**.
Wildcard (Multiple Characters)	% at the beginning (only in search fields that are not required or conditionally required), middle, or end of a word. One of these conditions must be selected: • Starts with • Ends with • Contains • Does not contain **Caution** Using this wildcard at the beginning of a word can impact performance.	Results include words that replace the wildcard with zero or more characters. You can use the wildcard more than once in one word. Precede % with a \ if you want to search for a term with the actual symbol. For example, to search for **expense** %, enter **expense** \%.	exp%	Records with the word **exp** or words beginning with **exp**, such as **expense** or **expert**.

Wildcard (Single Character)	_ at the beginning (only in search fields that are not required or conditionally required), middle, or end of a word. One of these conditions must be selected: • Starts with • Ends with • Contains • Does not contain	Results include words that replace the wildcard with one character. You can use the wildcard more than once in one word. Precede _ with a \ if you want to search for a term with the actual symbol. For example, to search for **expense_report**, enter **expense _report**. **Note** Depending on search technology, this wildcard does not match spaces or symbols that separate words. For example, **expense_report** does not match **expense report** or **expense/report**.	exp_nse	Records with words such as **expense** or **expanse**.
Symbol	Any symbol unless used in the context of wildcards	• Results include the entered symbol. • Results include words that have a space or another symbol in place of the entered symbol. The entered symbol is treated as a word break.	expense/report	• Records with the word **expense/ report**. • Records with words such as **expense report**, **expense-report**, or **expense/ report**.

Saved Searches: Explained

A saved search contains specific search criteria and settings that are captured for running the same search again later. You save the visible search fields and entered criteria, selected conditions, and search mode, either basic or advanced. You can choose to save search result display settings as well, for example the values entered in Query By Example fields, which columns to display or hide, the sort order, and column order. A saved search does not include the current set of search results or search result sort order. The values selected for filters in the search results table toolbar may or may not be included in the saved search.

Note

This type of saved search is created in the local area and is different from the one in the global area.

To create a saved search, set the search criteria, run the search, and click the **Save...** button. You must run the search before saving it; otherwise, the saved search will be based on criteria for the last executed search.

Availability and Usage

A saved search can be limited to the page where you created the saved search, or in some cases available in other searches for the same object. You can determine which saved searches to use as items in the Watchlist, where available.

Settings

When you create or edit a saved search, you define settings that affect what it includes and how it is used.

This table shows the available settings and what you determine if you select the option.

Saved Search Setting	Description
Set as Default	The saved search is selected by default when you open the corresponding page, so the saved search criteria values are automatically set.
Run Automatically	A search runs as soon as the saved search is selected from the **Saved Search** field. If the Set as Default option is also selected, then the saved search runs as soon as you open the corresponding page.
Save Search Results	The saved search captures the size, order, text wrap state, hide state, and freeze state of all search result columns, as well as values entered in Query By Example fields. This option is only available when you create the saved search.
Show in Search List	The saved search is displayed in the **Saved Search** field. Hidden searches are still displayed in the Personalize Saved Searches dialog box. This option is only available when you edit the saved search.

Query By Example Operators and Wildcards: Explained

You can use operators and wildcards within Query By Example fields for columns with character or number values. Do not use operators or wildcards for date fields.

This table describes the operators that you can enter in a Query By Example field.

Operator	Description
None (you enter only a value)	• Character fields - Starts with • Number or date fields - Equals
>	Greater than
<	Less than
>=	Great than or equal to
<=	Less than or equal to
and	And **Note** You can use this operator only in conjunction with other operators, for example: > 0 and <= 1000.
or	Or

This table describes the wildcards that you can enter in a Query By Example field. You can use them at the beginning, middle, or end of the entered value.

Wildcard	Description
*	Multiple characters
?	Single character

All other symbols are ignored.

FAQs for Search in Local and Regional Areas

How can I use Query By Example?

Enter values by which to filter search results in the Query By Example fields, which are located immediately above table column headers for some searches in the local area, and press Enter. Results now consist of records that fulfill the criteria entered in all Query By Example fields. You can press Enter again to refresh the filter results, or, if available, select the **Search** icon from the table toolbar or **Refresh** from the **View** menu. The filter still applies even if the Query by Example fields are hidden. To remove the filter, clear all Query By Example fields or, if available, select **Clear** from the **View** menu.

4

Data Management

Installing and Uninstalling Desktop Clients: Points to Consider

The Oracle Fusion Applications Desktop Components installer contains multiple desktop clients that you can install so that you can use the corresponding features in Oracle Fusion Applications. For example, to use spreadsheets to create or edit records that you can upload to Oracle Fusion Applications, you must install the Oracle ADF Desktop Integration Runtime Add-in for Excel client.

Install

To install any or all of the available desktop clients, go to **Navigator** - **Tools** - **Download Desktop Integration Installer** . Make sure that the downloaded file has the .exe extension.

When you open the installer, select the Complete setup type to install all clients, or Custom to pick only the clients that you want to install.

Important

If you are doing a custom install, make sure that you install all the clients you need. If you later want to install other clients, you must first uninstall all currently installed clients before performing the installation process again and selecting all the needed clients.

Likewise, to reinstall any of the desktop clients, you must first uninstall them.

Uninstall

The uninstall process removes all currently installed desktop clients. You must reinstall the clients that you still need to use.

To uninstall, open the desktop integration installer, either an existing or a newly downloaded one, and select the **Remove** option. In addition, use the Add or Remove Programs dialog box from the Control Panel to finish removing these clients, if you have either or both installed:

- Oracle ADF Desktop Integration Runtime Add-in for Excel

- Oracle Fusion Projects Integration for Microsoft Project

Setting Up Spreadsheet Integration: Points to Consider

To use a spreadsheet to create or edit records that you can upload to Oracle Fusion Applications, you must fulfill software requirements, install a desktop client, and set up Microsoft Excel.

Software Requirements

You must use:

- Microsoft Excel 2007 or above
- Internet Explorer 7 or above
- Microsoft Windows 7, XP Professional SP2, or Vista

Desktop Integration Installer

Install the Oracle ADF Desktop Integration Runtime Add-in for Excel, which is a desktop client that enables you to use the spreadsheets that you download from Oracle Fusion Applications. Go to **Navigator - Tools - Download Desktop Integration Installer** . The installer includes other desktop clients, so if you use the Custom setup type during installation, then select **Oracle ADF 11g Desktop Integration**.

You must reinstall the desktop client with each major upgrade or patch to Oracle Fusion Applications so that you are using the correct version of the client. You can find your client version in the About section of the spreadsheet.

Microsoft Excel Setup

Perform the following steps in Microsoft Excel only once, even if you reinstall the desktop client.

1. Click the **Microsoft Office** button, and click the **Excel Options** button.
2. In the Excel Options dialog box, select the Trust Center tab, and click **Trust Center Settings**.
3. In the Trust Center dialog box, select the Macro Settings tab, and select the **Trust access to the VBA project object model** check box.

Note

The exact steps can vary depending on your version of Microsoft Excel.

Working in Spreadsheet: Points to Consider

Where available, you can download a Microsoft Excel file based on a predefined template in which you can create or edit records. While you work in the spreadsheet, no changes are actually made in Oracle Fusion Applications; your edits take effect only after you upload the records back. As you work, keep in mind conventions and statuses used in the file, requirements for search, possible need to refresh, and things you should not do.

Conventions

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

Statuses

The worksheet status in the header area applies to the entire worksheet, or tab, within the Excel file. Likewise, the table status applies to only the corresponding table. The row status applies to the state of the row within the Excel file, not to the record itself. For example, if the row is an expense item, the status does not mean the status of the expense item itself, but of the data in the row, in the context of the Excel file.

Search

Some predefined templates have search functionality. For the search to work within the Excel file, you must sign on to Oracle Fusion Applications.

Refresh

After you upload to Oracle Fusion Applications, you might need to refresh the data in the table if your changes are not reflected. You can use the refresh option for the table, or perform a filter or search on the table.

What You Should Not Do

To make sure that the upload to Oracle Fusion Applications goes smoothly, do not:

- Rename text from the template, for example the worksheet or tab names.
- Use your own styles in the file.
- Add columns.
- Delete any part of the template, for example columns.
- Hide required columns and status columns or headers.

Spreadsheet Integration: Troubleshooting

The integration of Oracle Fusion Applications with Microsoft Excel allows you to download a spreadsheet, create or edit records in the spreadsheet, and upload the records to Oracle Fusion Applications.

Issue

The integration is not working. For example, you get an error when you try to open the spreadsheet that you downloaded from Oracle Fusion Applications, or the spreadsheet is not rendering properly.

Resolution

Check the version of the Oracle ADF Desktop Integration Runtime Add-in for Excel client that you currently have, and ask your system administrator whether you need to reinstall it. Find the version in the About section of the spreadsheet.

If you have the correct version, then in Microsoft Excel:

1. Click the **Microsoft Office** button, and click the **Excel Options** button.
2. Select the Add-Ins tab, and check if **Oracle ADF Desktop Integration Runtime Add-in for Excel** is in the **Inactive Application Add-ins** or **Disabled Application Add-ins** list.
3. If **Oracle ADF Desktop Integration Runtime Add-in for Excel** is in the **Disabled Application Add-ins** list:
   a. Select **Disabled Items** in the **Manage** field and click **Go**.
   b. In the Disabled Items dialog box, select oracle adf desktop integration runtime add-in for excel and click **Enable**.
   c. Back in the Excel Options dialog box, select **COM Add-ins** in the **Manage** field and click **Go**.
   d. In the COM Add-Ins dialog box, select **Oracle ADF Desktop Integration Runtime Add-in for Excel**.

   If **Oracle ADF Desktop Integration Runtime Add-in for Excel** is in the **Inactive Application Add-ins** list, then perform only steps 3.3 and 3.4.
4. If **Oracle ADF Desktop Integration Runtime Add-in for Excel** is in the **Active Application Add-ins** list, then contact your help desk.

Note

The exact steps can vary depending on your version of Microsoft Excel.

FAQs for Data Management

What's the difference between the export and work in spreadsheet options?

Use the **Export** button or menu option to download data to view or analyze. You get a Microsoft Excel file, of any type that Excel supports, containing selected or all records from the corresponding table. If row selection is disabled, then the export would include all rows. When all rows are exported, that includes all the rows that are not visible on the page. However, any search criteria, filters, and Query By Example values applied to the table can exclude rows from the export. Data from hidden columns are also not included in the export.

Use the option to work in spreadsheet to create or edit records in a Microsoft Excel file and upload the records back into Oracle Fusion Applications. This feature is helpful for mass updates or working outside of Oracle Fusion Applications. The file is based on a predefined template, which you download in most cases from a link in the regional area, for example the **Create Expense Items in Spreadsheet** link, or from a table, for example using the **Prepare in Spreadsheet** button. The spreadsheets downloaded from a link can include rows of data, or empty rows except for default values in some columns. From a table, what is included in the spreadsheet is determined the same way as for the export option. If no rows are selected, however, the spreadsheet does not include any records from the table.

Note

If you are using a feature integrated with Oracle Fusion Applications that presents a set number of rows per page or view, then exporting or downloading all rows might not include all the data you want. You might need to navigate to subsequent sets of rows to export or download.

How can I delete attachments?

Use the **Delete** icon button if available. If not, that means there are no attachments or more than one attachment for the object. When the **Delete** icon button is not available, use the **Manage Attachments** icon button to open the Attachments dialog box and delete specific attachments.

5

Notifications and Approvals

Worklist: Highlights

Use the Worklist feature to access and act on workflow tasks, which are tasks that require your attention and are routed and tracked to completion by the application. These tasks can be informational only or require your action. An expense approval is an example of a task requiring action. If an expense report is routed to you for approval, then you will see the task in your Worklist queue and receive an e-mail notification.

The Worklist feature is from the Oracle SOA Worklist Application in the Oracle SOA Suite, and described in the Oracle Fusion Middleware Developer's Guide for Oracle SOA Suite. As you read content from that guide, note that:

- This guide is aimed at developers. Ignore sections that are not linked to from this help.
- The guide covers the Oracle SOA Worklist Application itself, so any figures depicting application pages would likely not match what you see in Oracle Fusion Applications. Though you can use the Worklist feature within Oracle Fusion Applications, you also have access to the application, for example from the Worklist: Notifications and Approvals region on the Welcome dashboard. Any changes you make in Oracle SOA Worklist Application affect your worklist in Oracle Fusion Applications as well.

Searching for and Accessing Tasks

- The Worklist: Notifications and Approvals region on the Welcome dashboard contains all open tasks assigned to you across all Worklist servers, each of which corresponds to a product family.
- Use filters and search to go to specific tasks in a Worklist table. The advanced search is not available in Oracle Fusion Applications.

  See: How To Filter Tasks
- Use the View menu in any Worklist table to see all the Worklist servers relevant to you. When you click a server name, you go to and access the tasks in that server.
  - Where available under the View menu, you can also access Worklist views, which are subsets of tasks that meet specified criteria. You can manage your views in the Oracle SOA Worklist Application.

See: How To Create and Customize Worklist Views

Creating Tasks

- You can create a to-do task for yourself or others from a Worklist table.

  See: How To Create a ToDo Task

- A business task is one that is created as a result of something done outside of the Worklist table, for example when you create an expense report.
- For any business or to-do task, you can create subtasks to be completed.

  See: How To Create a Subtask

Acting on Tasks

- Each task provides a set of available actions appropriate to the task. For example, an approval task allows you to approve, reject, or request information.

  See: Acting on Tasks: The Task Details Page

  See: How To Act on Tasks

  See: Approving Tasks

FAQs for Notifications and Approvals

What's the difference between the Watchlist and the Worklist?

The Watchlist feature provides a set of shortcuts to items that you want to track or that require your attention. Use the Watchlist to see a count for each item and to navigate to the relevant work area where you can view or perform tasks on the item. For example, a Watchlist item is for expense reports awaiting submission. You can see how many expense reports you have created but not yet submitted, and click the Watchlist item link to navigate to the work area where these reports appear.

The Worklist feature presents workflow tasks that require your approval or other action, as well as notifications for you to view. Use the Worklist to manage your tasks, access their details, or take appropriate action. For example, some managers might see approval tasks for invoices, and select a particular task to approve, reject, or otherwise act on the corresponding invoice.

Note

In some cases, you can use either the Watchlist or Worklist to perform the same task. For example, managers can also use the Watchlist item for invoices requiring their approval to see all such invoices and then select the one to act on.

How can I disable or control the notifications that appear in the global area?

To disable the notifications that automatically appear in the global area, select the **Disable notification pop-ups** check box in the dialog box. You can still select the

Notification icon in the global area to manually access notifications, as well as to enable or disable the automatic notifications.

To disable notifications from the global area entirely and hide the **Notification** icon, use preferences in Oracle SOA Worklist Application. In the Worklist: Notifications and Approvals region on the Welcome dashboard of Oracle Fusion Applications, select the server that corresponds to your product family under **View** - **Servers** . Once you are in Oracle SOA Worklist Application, click the **Preferences** link and then select the Notification tab. Deselect the Browser Popup channel as a default and make sure that none of the filters involve sending messages to the Browser Popup channel. Repeat these steps for other servers as desired.

In Oracle SOA Worklist Application preferences, for the selected server, you can also determine the types of notifications to receive in the global area by creating or editing filters involving the Browser Popup channel.

For more information on specifying notification settings, see the Oracle Fusion Middleware Developer's Guide for Oracle SOA Suite.

Why can't I find a notification that appeared earlier in the global area?

These notifications are automatically deleted from the list in the global area after 30 days, and considered read after 14 days.

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Collaboration Features

Activity Streams: Highlights

Activity streams provide a streaming view of activities from your connections, actions taken in spaces, and other business activities. For example, you might see that specific users have created, edited, or deleted specific business objects such as leads or contacts, and you can access more information about the user or object. Additionally, similar to social networking Web sites, the activity stream displays messages that other users want to broadcast.

The activity stream is an Oracle WebCenter feature, available in Oracle Fusion Applications on the Welcome dashboard and various other locations within and outside the context of spaces. The types of activities that are tracked vary depending on each individual Activity Stream region.

Activity streams are fully described in the Oracle Fusion Middleware User's Guide for Oracle WebCenter Spaces. As you read content from that guide, note that:

- In Oracle Fusion Applications, activity streams can exist outside of spaces. Even though the guide describes activity streams only in the context of spaces, activity streams work similarly outside of spaces.
- The scope of what is potentially tracked in activity streams is different from what is described. There are many types of activities specific to Oracle Fusion Applications.
- The exact navigation or user interface in Oracle Fusion Applications might differ from what is described. You can ignore content specific to Oracle WebCenter Spaces.

Options and Preferences

- Where available, you can control the scope of what is displayed in specific Activity Stream regions.

  See: Selecting the People to Stream in an Activity Stream Instance

  See: Selecting the Spaces to Stream in an Activity Stream Instance

  See: Selecting the Services to Stream in an Activity Stream Instance

- For a specific activity stream, you can also hide activities from individual users or spaces.

  See: Hiding and Showing the Activities of a Selected User

  See: Hiding and Showing the Activities of a Selected Space

- If you have access to the Oracle Fusion Applications activity stream preferences, then you can determine the types of Oracle Fusion Middleware Extensions for Applications (Applications Core) activities to track. Applications Core activities are only displayed in the Activity Stream region on the Welcome dashboard for administrators with appropriate roles.

Using Activity Streams

- In the Activity Stream region on the Welcome dashboard, you can publish a message that is displayed in the activity streams of all your connections, or only those with access to a selected space.

  See: Selecting the Recipients of a Published Message

  - Where you have access, you can also post a message for a specific user.

    See: Posting a Private Message

- Where available, you can comment on or express a liking for specific activities.

  See: Liking and Commenting On Activity Stream Items

- Where available, you can share a particular item in your activity stream with others.

  See: Sharing Files and other Objects Through an Activity Stream Item

Announcements: Highlights

Announcements offer a quick, convenient way to create and distribute messages instantly or at a time you specify. The announcements feature is an Oracle WebCenter service, used within Oracle Fusion Applications most prominently in spaces and Oracle Fusion Applications Help.

Announcements are fully described in the Oracle Fusion Middleware User's Guide for Oracle WebCenter Spaces. As you read content from that guide, note that:

- In Oracle Fusion Applications, announcements can exist outside of spaces. Even though the guide describes announcements only in the context of spaces, announcements work similarly outside of spaces.
- The way to access announcements in Oracle Fusion Applications can be different from what is described, especially if the feature is available outside of spaces.

Understanding Announcements

- Even when outside of spaces, announcements are still integrated with other Oracle WebCenter services.

See: What You Should Know About the Announcements Service

Using Announcements

- If you have access to a page where announcements are available, then you can view announcements and adjust your view of them. When outside of spaces, only the discussions server system administrators can create, edit, and delete announcements.

  See: Working with the Announcements Task Flow

- If you have access to view or manage announcements, then you can send particular announcement messages through e-mail.

  See: Sending Mail from an Announcement

- If you have access to view or manage announcements, then you can link announcements if links are configured in your application.

  See: Linking Announcements

Discussions

Using Discussions: Highlights

Discussions let you create and participate in text-based discussions with other users within the scope of specific business objects, an application, or a space. For example, in Oracle Fusion Applications Help, you can post questions or comments regarding topics covered by a specific help file, and view posts from others regarding the same help.

The discussions feature is an Oracle WebCenter service used within and outside of spaces in Oracle Fusion Applications.

Discussions are fully described in the Oracle Fusion Middleware User's Guide for Oracle WebCenter Spaces. As you read content from that guide, note that:

- In Oracle Fusion Applications, discussions can exist outside of spaces. Content specific to spaces does apply to spaces within Oracle Fusion Applications, but discussions work similarly outside of spaces.
- There are various user interfaces, or task flows, described in the guide. What is available to you depends on the pages that you have access to.

Participating in Discussions

- Within a discussion, moderators create forums in which you can view and participate in the topics, or threads.

  See: Creating and Managing Forum Topics and Replies

- You can watch discussion forums or topics to receive notifications whenever anyone posts.

  See: Watching Forums and Topics

- You can send contents of a discussion topic to others using e-mail, as well as link from a topic to another object.

See: Sending Mail from Discussion Topics

Moderating Discussions: Highlights

As moderators of discussions, you can create and manage discussion forums, as well as manage the content of specific forums. The discussions feature is an Oracle WebCenter service used within and outside of spaces in Oracle Fusion Applications. In Oracle Fusion Applications, discussion posts are stored in a WebCenter table and the FUSION_WEBCENTER schema.

Details about moderating discussions are included in the Oracle Fusion Middleware User's Guide for Oracle WebCenter Spaces and the Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter. As you read content from these guides, note that the security described does apply to discussions within spaces in Oracle Fusion Applications, but additional security applies, especially to discussions outside of spaces.

Understanding Discussions

- Not all discussions user interfaces, or task flows, are available in Oracle Fusion Applications, and you can disregard content specific to the Oracle WebCenter Spaces application. Refer to the Oracle Fusion Middleware User's Guide for Oracle WebCenter Spaces.

  See: What You Should Know About the Discussions Service

- Moderators of discussions within and outside of spaces must have the necessary roles, including the administrator role. Refer to the Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter.

  See: Granting Administrator Role for Oracle WebCenter Discussions

Managing Forums

- As a moderator, you can create and edit forums. Refer to the Oracle Fusion Middleware User's Guide for Oracle WebCenter Spaces.

  See: Creating a Discussion Forum

  See: Editing the Forum Name and Description

- You can also edit or delete others' posts, including individual posts or entire threads. Refer to the Oracle Fusion Middleware User's Guide for Oracle WebCenter Spaces.

  See: Editing Topics and Replies

  See: Deleting Topic Posts and Replies

Links: Highlights

Links provide a way to view, access, and associate related information. The links feature is an Oracle WebCenter service, used within Oracle Fusion Applications within and outside of spaces. The objects that you can link to are other Oracle

WebCenter services, for example announcements and discussion topics, or items used within spaces, for example documents and notes.

Links are fully described in the Oracle Fusion Middleware User's Guide for Oracle WebCenter Spaces. As you read content from that guide, note that in Oracle Fusion Applications, links can exist outside of spaces. Even though the guide describes links only in the context of spaces, links work similarly outside of spaces.

Using Links

- You can link from announcements, discussions, documents, events, lists, and pages, where available. Documents, events, and lists are available only within spaces.

  See: What You Should Know About the Links Service

  See: Working with Links Service Features

Spaces

Using Spaces: Highlights

Spaces support the collaboration of project teams and communities of interest by providing a dedicated and readily accessible area for relevant services, pages, and content, and by supporting the inclusion of specified members. Spaces include various collaboration features such as discussions, wikis, blogs, and so on. Spaces are an Oracle WebCenter feature used not only in the Oracle WebCenter Spaces application but also throughout Oracle Fusion Applications.

Spaces are fully described in the Oracle Fusion Middleware User's Guide for Oracle WebCenter Spaces. As you read content from that guide, note that:

- You can disregard content specific to the Oracle WebCenter Spaces application, for example the home space. Even though there is no home space in Oracle Fusion Applications, many of the features within the home space are also available in Oracle Fusion Applications.

- The way to access spaces in Oracle Fusion Applications is different from what is described. In Oracle Fusion Applications, you can use the **Spaces** link in the global area or on pages where available, as well as the Spaces dashboard.

Understanding Spaces

- Spaces bring people together in a virtual environment for ongoing interaction and information sharing, enabling the formation and support of social networks.

  See: What You Should Know About Spaces

  See: What Does a Space Look Like?

Joining and Viewing Spaces

- To join a space, you can be invited by someone else, in which case you receive a notification. To see all the spaces that you can join, you can use the Spaces link in the global area or go to the Spaces dashboard, which contains a list of the spaces you are currently a member of, recommended spaces, and a search for all public spaces you can join.

See: Changing Your Role in a Space

See: Cancelling Space Membership

- If you have access to do so, you can create a space if you cannot find an appropriate one to join. You are then by default the moderator of that space.
- You can also link your personal business objects, for example your own goals, to a space. Only you, or also select others depending on security, can access those personal objects.

- The content of a space depends on the tools and services made available by the space moderator.

  See: Viewing Pages in a Space

  See: Personalizing Your View of Pages in a Space

Moderating Spaces: Highlights

When you create a space, you are the default moderator of that space. Spaces are an Oracle WebCenter feature used not only in the Oracle WebCenter Spaces application but also throughout Oracle Fusion Applications.

Details about managing spaces are included in the Oracle Fusion Middleware User's Guide for Oracle WebCenter Spaces. As you read content from this guide, note that:

- The security described does apply to spaces in Oracle Fusion Applications, but additional Oracle Fusion Applications security applies.
- You can disregard content specific to the Oracle WebCenter Spaces application, for example the home space. Even though there is no home space in Oracle Fusion Applications, many of the features within the home space are also available in Oracle Fusion Applications.

Creating and Maintaining Spaces

As moderators, you can create spaces, determine their design and content, and manage members. Your own roles determine what is available for you to add to the space.

- Use space templates to determine the design of the space.

  See: Working with Space Templates

- Some spaces can be automatically created, in certain applications. In most cases, you manually create spaces in the context of a business object or project, for example regarding a specific opportunity, or from space administration pages.

  See: Managing a Space

- Spaces can contain nested spaces.

  See: Working with a Space Hierarchy

- Instead of creating a new space, you can alternatively link an existing space to the current business object. This is useful when a single space is to be used across multiple objects or within multiple work areas. For example, you can link a specific project to a space. All members of the project would then also have access to the linked space.

- You control the roles and privileges of space members. Aside from inviting members as described, you can also invite them elsewhere in Oracle Fusion Applications.

  See: Managing Space Members and Roles

Tags: Highlights

Use tags to categorize business objects in Oracle Fusion Applications, for example specific invoices and opportunities, with your own keywords. You can share tags so that anyone searching or browsing for items can find them based on common tags. For example, members collaborating on a project can tag all related work with a particular term. Though tags are available to anyone who has access to the item, you can designate tags to be private when you create them.

The tags feature is an Oracle WebCenter service.

Tags are fully described in the Oracle Fusion Middleware User's Guide for Oracle WebCenter Spaces. As you read content from that guide, note that:

- You can disregard discussions specific to the Oracle WebCenter Spaces application, for example the global search in the application.
- While the guide describes tagging WebCenter pages and documents, in Oracle Fusion Applications, you tag specific business objects.
- Not all tag features are available in Oracle Fusion Applications, for example the Tags and Similarly Tagged Items user interfaces.

Understanding Tags

- Aside from the Tags icon and the Tag Center dialog box, tags are available in Oracle Fusion Applications from applicable Oracle Fusion Applications Search results. The search considers tags in finding matching results. The search results do not indicate the number of times a particular tag was applied, and not all searches, for example the one in the global area, retrieve private tags.

  See: Understanding Tags

- You can access the Tag Center dialog box from the global area or other places in Oracle Fusion Applications, for example in Oracle Fusion Applications Help. The tag center shows all tags, not just those relevant to what you are working on. For example, the tag center in Oracle Fusion Applications Help displays all tags, not just those that help files are tagged with.

See: Understanding the Tag Center

Using Tags

- Use the Tags icon to tag specific business objects. Read only about the step that describes the fields you enter to tag an item.

  See: Tagging WebCenter Portal Application Pages

- Browse and search for items using tags in the Tag Center dialog box. Disregard instructions about how to open the tag center.

  See: Working with Tags and Tagged Items in the Tag Center

FAQs for Collaboration Features

What's the difference between connections or activity streams in the Welcome dashboard and the person gallery?

The connections you have on the Welcome dashboard are the same as the ones in the person gallery, so anything you do in one place would be reflected in the other.

The activity stream on the Welcome dashboard is essentially the same as that in the person gallery, except that the activities logged are broader in scope and includes objects such as projects, whereas activities in the person gallery show only information about people.

Why can't I see any associated items for a tag in the tag cloud?

You can see all tags in the Tag Cloud section of the Tag Center dialog box; however, you can see specific items associated with a tag only if you have access to those items based on security.

7

Processes, Reports, Analytics

Processes, Reports, and Analytics: Overview

Use processes, reports, and analytics to process data in a batch or to display information in a way that meets business needs or aids in decision-making.

Processes, many of which are reports that provide printable output, can be scheduled and submitted to achieve a desired result that impacts a select set of records. Oracle Business Intelligence Publisher is also used in Oracle Fusion Applications to provide printable reports.

Analytics, or business intelligence, provide select data that you can analyze to gain actionable insight. Some analytics are automatically provided in context as you work in Oracle Fusion Applications, while others are interactive business intelligence objects that you can create and edit to get the information you need for analysis. Most of the analytics in Oracle Fusion Applications are based on features and tools from Oracle Business Intelligence Enterprise Edition.

You usually view or work with processes, reports, and analytics directly on the pages that you have access to, including the Reports and Analytics pane where available. In addition, the Reports and Analytics work area and the Scheduled Processes work area are always available from the **Navigator** menu.

Reports and Analytics Pane: Explained

The Reports and Analytics pane provides a central place for you to quickly view or run any operational or analytical report relevant to your work. The pane is available in work areas across Oracle Fusion Applications, and contains links to reports specific to the work area. You can also select **Navigator** - **Tools** - **Reports and Analytics** to go to the Reports and Analytics work area, which contains links to all reports that you have access to.

Report Links

Each link in the Reports and Analytics pane is generically referred to as a report and represents a mapping to an object in the Oracle Business Intelligence (BI) Presentation Catalog. The catalog contains reports and analytics in Oracle Fusion

Applications and presents them in an organized hierarchy. In the Reports and Analytics pane, business intelligence analyses are of type Analysis, business intelligence dashboards are of type Dashboard, and Oracle Business Intelligence Publisher reports are of type Report.

Reports can be mapped to one or more work areas for the Reports and Analytics pane, so you might see the same report in different work areas. You can also have multiple instances of the same report in one work area, but with different parameters. In the Reports and Analytics work area, you can have links to the same report in multiple folders, as well as multiple instances of the same report in the same folder, but with different parameters.

Tip

You can access the catalog directly from the Reports and Analytics toolbar. After you click on a report link in the Reports and Analytics pane, you can also then click the **More** link to get to the report within the Oracle BI Presentation Catalog. The catalog is part of Oracle Business Intelligence Enterprise Edition, so from there you have access to all available business intelligence features.

Business Intelligence Analyses and Dashboards

In the Reports and Analytics pane, click the link for the business intelligence analysis or dashboard that you want to view or edit. Any changes you make to existing reports will be reflected wherever else the analysis or dashboard is used in Oracle Fusion Applications, unless you are working on a report in the My Folder area or saving a copy of the edited report in that area.

You can create business intelligence analyses and dashboards from the Reports and Analytics toolbar, using BI Composer. When you create a report, saving it in the My Folder area within the Oracle BI Presentation Catalog means that only you have access to it. If you have access to the Shared Folders area in the catalog and save the report in a folder there, then the report is available to anyone with access to the folder. Administrators with access to the folder can map the report to the Reports and Analytics pane for all users of selected work areas.

If you create the report from the Reports and Analytics work area, then the report is available in the Reports and Analytics pane only in this work area. If you create it in any other work area, then the report is available in the Reports and Analytics pane in that work area as well as the Reports and Analytics work area.

Note

If you create a report in Oracle Business Intelligence Enterprise Edition itself and save it in the My Folder area, then the report is available in the Reports and Analytics work area. If you save the report in the Shared Folders area, then the report does not automatically appear in your Reports and Analytics pane. You can ask an administrator to map it to selected work areas, but the report would be available to all users with access to the work areas.

For more information on using BI Composer to create and work with analyses, see the Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition (Oracle Fusion Applications Edition).

Oracle Business Intelligence Publisher Reports

In the Reports and Analytics pane, you can view the latest submission of Oracle BI Publisher reports. If the report is registered as a process, then you can also schedule it to run as a process with specified parameters at specified times. You can manage these submissions as you would any other process.

To navigate to Oracle BI Publisher to customize reports and perform other tasks, access the Oracle BI Presentation Catalog, for example from the Reports and Analytics toolbar. Ask your administrator if you need specific reports to be registered as processes for submission in the Reports and Analytics pane.

Business Intelligence

Business Intelligence Objects: Highlights

Business intelligence objects are interactive analytic reports that display select data to aid in decision-making. Most of these objects in Oracle Fusion Applications are based on Oracle Business Intelligence (BI) Enterprise Edition and called analyses. Predefined analyses are available in Oracle Fusion Applications, but you can also create and edit analyses from the Reports and Analytics pane or work area. Optionally access Oracle BI Enterprise Edition itself, for example through the Reports and Analytics pane. New objects and changes to existing objects that you make in Oracle BI Enterprise Edition are reflected and available from Oracle Fusion Applications.

Analyses and other business intelligence objects are described in the Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition (Oracle Fusion Applications Edition). As you read content from this guide, note that the guide is describing Oracle Business Intelligence Enterprise Edition, not business intelligence objects specifically in Oracle Fusion Applications.

Using Analyses and Dashboards

- Analyses from Oracle BI Enterprise Edition are usually based on real-time, transactional or operational data. You can also run trend and historical analyses of long range data stored in a data warehouse that is specifically dedicated to analytics. You might not see any data for a trend or historical analysis if you do not have roles allowing access to view that data.

  See: Creating Analyses

- Warehouse analyses can be presented in a dashboard, which is a business intelligence object containing multiple analyses and possibly other content.

  See: Building and Using Dashboards

Catalog

- Analyses, dashboards, and other business intelligence objects are stored in the Oracle Business Intelligence (BI) Presentation Catalog, which for Oracle Fusion Applications also contains Oracle Business Intelligence

Publisher reports and some financial reports. The catalog contains all the business intelligence objects for Oracle Fusion Applications, including any analyses that you create for yourself and store in your personal folder in the catalog, or that you create for others as well and store in a shared folder, if you have access to do so.

See: What is the Oracle BI Presentation Catalog?

See: Saving Business Intelligence Objects

- From the catalog, you can find objects to view or manage.

  See: Searching with the Basic Search

  See: Searching Using Full-Text Catalog Search

Oracle Business Intelligence Publisher: Highlights

Oracle Business Intelligence (BI) Publisher is used with Oracle Fusion Applications for high volume reporting, for example payroll reports, as well as statutory reports and other highly formatted, detailed reports. In most cases, you would use predefined Oracle BI Publisher reports where available in Oracle Fusion Applications. You can also, however, access the Oracle BI Publisher application itself, for example by opening the Oracle BI Presentation Catalog from the toolbar of the Reports and Analytics pane. You can view and schedule Oracle BI Publisher reports, or to create and edit reports and layouts.

Oracle Business Intelligence Publisher is described in the Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Publisher and the Oracle Fusion Applications Extensibility Guide.

Using Oracle Business Intelligence Publisher

- You can view and schedule Oracle Business Intelligence Publisher reports directly in Oracle BI Publisher. Anything you schedule in Oracle BI Publisher can also be seen in Oracle Fusion Applications. Refer to the Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Publisher.

  See: Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Publisher

- If you have the appropriate roles, then you can create and edit reports and layouts in Oracle BI Publisher. What you create or edit is also available or reflected in Oracle Fusion Applications. Refer to the Oracle Fusion Applications Extensibility Guide.

  See: Customizing Reports

  - Reports must be registered as processes to be submitted from the Reports and Analytics pane.

    See: Registering Reports with Oracle Enterprise Scheduler Service

    See: Making Reports Available to Users in the Reports and Analytics Pane

Processes

Scheduled Processes: Explained

Use processes to manipulate records in a batch for a specific business need. Processes can create, update, or delete records, provide information based on records, or both. You can submit most processes directly on the pages you work in. Otherwise, you can always access the Scheduled Processes Overview page under **Navigator** - **Tools** . Process submission is also available in the Reports and Analytics pane or work area for Oracle Business Intelligence Publisher reports that are registered as processes.

Each process that you run is based on a job, which is the executable that determines what options are available to you and what the process can do. You can submit the same process using different parameters and other settings. Each process submission has a unique process ID. A process can also be based on a job set, which contains multiple jobs to be included in one process submission.

Parameters

A process might have parameters that you can set to control which records are included or how they are to be affected by the process. For example, date range parameters can limit the scope of the process to records that are effective within a period that you specify. In some cases, you might see conditional parameters, which are made available to you only after you set a specific parameter and are based on the value that you entered for that parameter.

Schedule

The default schedule for a process is to run as soon as possible. If you select the advanced mode in the Process Details dialog box, you can specify the exact dates and times to run the process, or set the process to run at a specified interval within a date range. If available, you can also select a saved schedule that your administrator has defined.

Output

Many processes provide printable output that presents specific information in a predetermined template. These processes, or the output itself, are also referred to as reports. There are many types of reports, for example financial or regulatory statements and listings of records that meet specified parameters. If you select the advanced mode in the Process Details dialog box, you can set more output options.

Notification

You can select to receive an e-mail when the process ends. If you select the advanced mode in the Process Details dialog box, you can also determine which users are notified if the process ends with a specified status.

Process Sets: Explained

A process set is a type of process that contains at least two processes to be run in a specific order as part of one submission. Process sets can contain any number of individual processes as well as other process sets. There can also be multiple levels of nested process sets within a single process set. For example, a process set can include three processes and two process sets, one of which contains another process set.

Just as individual processes are based on jobs, process sets are also based on job sets. A job set is a predefined set of jobs to be included in one process submission, and a job set itself can contain nested job sets.

When you submit a process, other processes can be invoked to automatically run, based on logic. This is not the same as a process set, which is a defined set of processes.

Hierarchy

When you select to run a process set, the Processes tab in the Process Set Details section lists all the individual jobs that all the processes in the set are based on. The job sets listed in this tab represent the parent of each job in the hierarchy. For example, you are submitting a process set containing job 1 and job set A, which contains jobs 2 and 3 and job set B, which itself contains jobs 4 and 5. Job 1 would have the job set that you are submitting as the parent, in the Job Set column. Jobs 2 and 3 would have job set A in that column, and jobs 4 and 5 would have job set B.

Submission Options

A process set itself does not have parameters; you set parameters for individual processes within the set as needed. You do determine schedule, output, and notifications for the entire process set as you would for any process submission.

Process Options: Examples

When you schedule a process, click the **Process Options** button to set options, such as language and time zone. Your settings apply only to this specific submission of the process, no matter if you are scheduling a one-time run or multiple runs.

Process options affect the data to be processed, not the output template text. These options override what is set in general preferences under **Personalization** - **Set Preferences** .

Language

You set the language process option to Spanish, while your general language preferences are all set to Japanese. The process output displays Category: Comida.

Currency

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

Process Output: Highlights

Many processes provide printable output, or reports, when the process ends successfully. The output is different from the process log, which provides information about the process run itself, for example details about why it resulted in error. The output features, including the templates used for the reports, are from Oracle Business Intelligence (BI) Publisher.

Output features are described in the Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Publisher. As you read content from this guide, note that you can ignore aspects that are specific to the Oracle BI Publisher application, for example where to go to view output.

Output Options

- When you schedule a process, you can define one or more output documents, which are distinct output files. In Oracle Fusion Applications, you specify only the name, layout, and format of each output document. The name is used to identify the output document when you view a process with multiple output documents.

  See: Adding Outputs

- Optionally select delivery destinations for any output document, for example to send the output to a particular recipient through e-mail. In Oracle Fusion Applications, the FTP and web folder destinations are not available.

  See: Adding Destinations

Viewing Output

- Access report output from the section in the work area where you submitted the process, or from the Details section for a selected process on the Scheduled Processes Overview page.

  See: Using the Report Viewer Options

  - The Send and Export actions are available are available when you republish a process.

FAQs for Processes

Why are processes displayed in a hierarchy?

A process with lower levels below it might be a process set. The hierarchy represents the organization of processes or process sets within a specific process set.

A process might invoke other processes to run automatically, so those processes are displayed in the hierarchy on the level below the original process.

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Personalization

FAQs for Page Personalization

How can I retain minor personalizations after I sign out?

Whether minor personalizations, such as changing table layout and hiding regions, persist if you leave the page or sign out depends on the page that you are on. To ensure that all minor personalizations for the page are retained after you sign out, select **Personalization** - **Edit Current Page** , if available, and make your personalization changes.

To retain the layout of search results tables, you can run a search, change the layout of the results table, then create a saved search with the Save Results Layout check box selected. If you want the saved search criteria and results table layout to be set on the page every time you open the page, then also select the Set as Default check box.

What happens if I restore the page to the default content and layout?

When you select **Personalization** - **Reset to Default Content and Layout** in the global area, if available for the page that you are on, you remove all changes that were already made to the page by selecting **Edit Current Page** from the same menu. The reset affects objects at the page level, for example dashboard regions that you added or moved around, as well as dashboard layout changes. Selecting this option also resets certain changes that were made within the components of a page, for example, if you changed the order of columns in a table or opened or closed a page section that is set otherwise by default.

Preferences

Accessibility Preferences: Explained

Use the accessibility preferences to select accessibility modes for Oracle Fusion Applications. Access accessibility preferences from the global area by clicking the **Accessibility** link or selecting **Personalization** - **Set Preferences** - **Accessibility** .

Accessibility

The screen reader mode provides an alternate rendering of the user interface components that is enhanced for use by screen reader users and keyboard-only users.

Color Contrast

The high contrast mode provides visual content that is compatible with operating systems or browsers that have high contrast features enabled. For example, the use of background images and background colors is optimized to prevent the loss of visual information while in high contrast mode. This mode does not provide much benefit if you are not also using your browser or operating system's high contrast mode. Depending on your needs, you might also find it beneficial to use the large fonts mode with the high contrast mode.

Font Size

The large font mode provides visual content that is compatible with browsers that are set to larger font sizes or have zoom capabilities. In the medium font mode, most text and many user interface containers have a fixed size to provide a consistent and well-defined look. In large font mode, text and containers have a scalable size. If you are not using larger fonts or browser zoom capabilities, then use the medium font mode. Depending on your needs, you might also find it beneficial to use the high contrast mode with the large font mode.

Applications Core Activity Stream: Examples

Use the activity stream preferences to select Applications Core (Oracle Fusion Middleware Extensions for Applications) activities to follow in your activity stream. You can see what other administrators are doing with respect to the Applications Core features that you select. Select to follow activities related only to the features that you have access to. For example, do not select data security if you do not have access to the data security pages yourself.

All Applications Core activities are tracked only in the Activity Stream region on the Welcome dashboard of Oracle Fusion Applications. The following scenarios provide examples of the types of activities you can track for each available Applications Core feature, but do not represent a comprehensive list of all possible activity types to be tracked.

Page Customizations

Another administrator has added a region to the Welcome dashboard of Oracle Fusion Applications for all users. This information is displayed in the Activity Stream region, and you can see the name of the administrator who made the customization, the page where the customization was made, and the organization that the customization applies to. You can also navigate to the customized page.

Data Security

Another administrator has granted the manager role access to instance set 123 of the employee database resource. This information is displayed in the Activity Stream region, and you can see the name of the administrator who granted the access, as well as the names or IDs of the role, instance set, and database resource.

Sandboxes

Another administrator has published a sandbox named Financials Sandbox. This information is displayed in the Activity Stream region, and you can see the name of the administrator who published the sandbox and the name of the sandbox. You can also click the sandbox name to see details about that sandbox.

Likewise, if another administrator makes a change within the context of a sandbox, for example customizing a page, then that information is also tracked in the activity stream. You can select specific sandboxes to follow by accessing the sandbox details from the Manage Sandboxes dialog box.

Flexfields

Another administrator has deployed a flexfield named Account. This information is displayed in the Activity Stream region, and you can see the name of the administrator who deployed the flexfield and the name of the flexfield.

Trees

Another administrator has created a new version of a tree code named Ledger, for the tree named Financials Hierarchy. This information is displayed in the Activity Stream region, and you can see the name of the administrator who created the version, as well as the names of the tree code and tree.

Proxies: Explained

Proxies are people who have access to your account for a specified period of time. For example, you can designate someone to be your proxy to perform tasks for you while you are on vacation. Define your proxies in your Oracle Fusion Applications preferences. Similarly, if others designate you as their proxy, then you see a **Switch To** menu in the global area that allows you to work as other users.

Important

In your preferences, if the user you are selecting to be a proxy is already defined as your proxy, then you automatically overwrite the existing definition.

Impersonation Sessions

An impersonation session starts when a proxy selects an account in the **Switch To** menu and gains access to work as that user. At any point, proxies can switch to other accounts available to them in that menu, including switching back to themselves. When proxies sign out completely and sign back in, they are always signed in as themselves.

When your proxies switch to your account, they are essentially signed in using your account. For example, they have access to what you have access to. However, they have no access to preferences, yours or their own, during an impersonation session. Anything they do, for example create, edit, or delete records, is done as you, with your account. Next time you sign in, you can see the work that your proxies have done on your behalf. There would not be any issues if multiple people try to use the application with your account at the same time, for example if multiple proxies use your account in overlapping time periods, or if you sign in while proxies are impersonating you.

Passwords

You do not share your password with your proxies. When your proxies switch to your account, they are prompted to enter their own password to verify their identity so that only the proxies you define can impersonate you.

FAQs for Preferences

Why did my general preferences settings automatically change?

Some general preferences are integrated with a user directory that is also accessed outside of Oracle Fusion Applications. It is possible that you or an administrator changed a setting elsewhere, and the new value is reflected in your preferences. If you now change the setting in your preferences, then that becomes the latest value and would be reflected wherever the user directory is integrated. The impacted preferences are: Application Language, Territory, Date Format, Time Format, Currency, and Time Zone.

What's the display name language preference?

The display name language preference determines which language all person names are displayed in, including your own name in the global area. Even if you only have one language installed, for example American English, there are pages in Oracle Fusion Applications that allow you to enter person names for different languages, for example Alexander for American English and Alejandro for Spanish.

If you set the display name language to Spanish, for example, and no value exists for Spanish, then the default display name in the LDAP is displayed. If you do not set the display name preference, then all user names will be displayed based on the language selected for the default language preference.

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

The person you want to set as your proxy must have a role with the appropriate privilege, FND_IMPERSONATE_USER_PRIV.

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Help

Searching for Help: Points to Consider

Although the search in Oracle Fusion Applications Help works like other searches in Oracle Fusion Applications, there are help-specific aspects to consider.

Scope

If you access help from a help window in the application, then the Search tab shows results for the business process activity relevant to the page or section where you opened the help window. Searches that you run at this point are limited to help related to that activity. To expand or change the scope of the search, use the breadcrumbs in the Search section or the Search by Business Process navigator.

If you access help from a help window for a task list or task in the Setup and Maintenance work area, then the Search tab includes all help for all offerings. To narrow the scope, select a specific offering in the Search by Functional Setup navigator.

Note

The search results for glossary terms are never filtered in any way.

Advanced Search

Use the advanced search to provide specific criteria for the help you are looking for. For example, you can search for help in a particular language, for specific help types, or for custom help, if any.

Help Types: Explained

Oracle Fusion Applications Help contains various types of help content, including demos, examples, FAQs, help topics, and PDF guides. A business process or product can be supported by some or all of these help types.

Demo

Demos are Oracle User Productivity Kit (UPK) topics that visually demonstrate how to use the application to complete a short task or portion of a task. Demos can also provide an introduction to complex dashboards and work areas.

Example

Examples provide real use cases of features to illustrate how and when to use the feature, or scenarios to illustrate abstract concepts. Worked examples show exactly what you need to do to achieve a specific result, emphasizing decisions that you make and values that you enter.

FAQ

FAQs, or frequently asked questions, provide brief answers to questions that you might have regarding a task or page. For example, they can briefly explain what a term means, why something happened, how you can perform an action, or what happens if you perform the action.

Help Topic

Help topics explain key concepts, illustrate how application components work together, or assist in decision-making by explaining points to consider or the options you have. Help topics can also provide reference, overview, and other information.

PDF Guide

PDF guides present a collection of help content from the other help types, except demos, in an organized and logical format. For example, there are guides addressing specific business processes and setup offerings. You can see lists of all guides from the **Guides** menu in Oracle Fusion Applications Help.

FAQs for Help

How can I find help for my country and language?

Use the advanced search in Oracle Fusion Applications Help to specify the language or country you want help for. When you access help from an application page, the country and language in your Oracle Fusion Applications preferences determine the help that you see by default. You see generic help plus help specific to your country, and help in English plus any help translated into your language. However, some application pages or sections are country specific and predefined with a country value that overrides your preferences, so that you see the appropriate help.

Why does the demo not appear when I click the See It link?

Your browser may be blocking pop-ups. Set your browser options to allow pop-ups from the help site because the demo opens in a new window.

Can people outside my enterprise see my help ratings, discussion forum posts, and tags?

No. Ratings, discussions (currently not available with SaaS, software as a service), and tags on help are internal to your enterprise.

Oracle Technology Network forums are always open to anyone on the Internet.

How can I hide embedded help, such as hints and help windows?

You cannot hide or disable embedded help for yourself. Administrators who customize the application can change and remove embedded help using developer tools, but such changes apply to everyone.

How can I access the Oracle Fusion Applications Technology Library?

In Oracle Fusion Applications Help, select **Technology** from the **Guides** menu.

How can I access guides that are not in Oracle Fusion Applications Help?

Go to Oracle Technology Network at http://www.oracle.com/technetwork/indexes/documentation.

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Troubleshooting

Troubleshooting Process: Examples

When you encounter an issue, you can try to diagnose it yourself and follow up with your help desk as needed. You can also take preventive measures and identify potential issues before running into real problems. Use these scenarios to understand how you can proceed and how the troubleshooting process might go.

Note

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

Diagnostics Tests - Health Check

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

1. You are a general ledger manager, and you periodically run relevant diagnostic tests to check on data, setup, and configurations, especially before closing the period.

2. You go to the Diagnostic dashboard and run the General Ledger Misclassified Accounts Validations test, to make sure that all accounts are correctly classified.

3. You review the test results and confirm that the accounts are ready for the period close process.

Diagnostic Tests - Troubleshooting

This example shows running a diagnostic test to start the troubleshooting process.

1. You are a general ledger manager, and you run into issues with the period close process.

2. You go to the Diagnostic dashboard and search for diagnostic tests using tags, with Financial Control and Reporting as the tag name.

3. You browse the search results for tests with Close Ledgers as the tag value

4. You find and run the appropriate test, General Ledger Closing Validations.

5. The diagnostic test results show issues that you cannot fix yourself, which are validation errors in setup, configuration, or data integrity, in this case incomplete accounting setup.

6. You notify your help desk regarding the diagnostic test validation failures and describe your issue.

Note

If the test results had shown issues that you cannot fix yourself, but did not have validation errors, then you would ask your help desk to create an incident, and the help desk would take over in the troubleshooting process.

7. Your help desk performs a fix and asks you to rerun the test.
8. You repeat steps 4 through 7 until the test completes with no issues identified.

Diagnostic Tests - Data Analysis

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

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

Incidents and Troubleshooting Options

This example shows a process involving an incident and troubleshooting options.

1. You encounter a system error message that mentions an incident, for example, `An application error has occurred. Your help desk can use the following information to obtain a more detailed description of this incident`, followed by incident identification information.
2. The help desk is notified regarding this incident. You capture the details in the error message, including the incident number, to use if you need to contact the help desk.
3. The help desk evaluates your incident.
4. Your help desk decides that more diagnostic information is needed and grants you temporary access to the **Troubleshooting Options** menu item.
5. The help desk asks you to set troubleshooting options with specific settings and then reproduce the problem.
6. You do as requested, and additional diagnostic information is captured.
7. The help desk asks you to return all troubleshooting options to the original setting, revokes your access to the options, and analyzes the captured diagnostics.
8. Your help desk is unsure how to resolve the problem and checks for a solution in the My Oracle Support knowledge base.

9. The help desk finds something that might work and tries it out. Only if necessary, the help desk would send the incident to Oracle Support for help in resolving the issue.

Diagnostic Tests: Highlights

Diagnostic tests are used in the troubleshooting process to identify and resolve issues. Diagnostic tests are available from the Diagnostic dashboard, which you access from the global area by selecting **Help** - **Troubleshooting** - **Run Diagnostic Tests** . If you do not see this menu item, then your help desk can make it available to you.

Using and managing diagnostic tests in general are described fully in the Oracle Fusion Applications Administrator's Guide. As you read content from that guide, you can ignore discussions about the command line interface because selecting **Run Diagnostic Tests** does not take you there.

Finding and Running Diagnostic Tests

- All predefined diagnostic tests are assigned a tag name and value. The predefined tags are based on business process modeling levels; the tag name is the business process area (L1), and the tag value is the activity (L3). For example, if you are a general ledger manager looking for diagnostic tests related to closing periods, you can search using Financial Control and Reporting as the tag name. In the search results, you would look under the hierarchy level with Close Ledgers as the tag value.
- Your roles determine what actions you can take, for example, whether you can view or also run diagnostic tests.

  See: Using the Diagnostic Dashboard to Run Diagnostic Tests

Reviewing Diagnostic Tests

After you submit a diagnostic test run, you can perform other tasks for your own submissions. Your roles determine if you can perform any of these tasks on diagnostic tests that others submitted.

- Check the status of the diagnostic test run itself, or see if individual diagnostic tests have detected problems.

  See: Using the Diagnostic Dashboard to Check the Status of a Diagnostic Test
- Cancel a test that is currently running.

  See: Canceling Diagnostic Test Runs
- Review diagnostic test results.

  See: Using the Diagnostic Dashboard to View the Results of Diagnostic Tests

  - If you have the roles that allow you to do so, optionally add the test result information to an existing incident.

Predefined Diagnostic Tests

Diagnostic Tests for All Oracle Fusion Applications

Some diagnostic tests can be used with all Oracle Fusion applications. Other tests apply to specific product families within Oracle Fusion Applications.

The following table lists the diagnostic tests that are relevant to many or all Oracle Fusion applications.

Test Name	Test Type	Purpose
Watchlist Categories	Health check, Troubleshooting, Data collection	Validates the setup data for all Watchlist categories.
Watchlist Item for User	Health check, Troubleshooting, Data collection	Validates the status of a specific Watchlist item for a specific user.
Watchlist Items	Health check, Troubleshooting, Data collection	Validates the setup data for all Watchlist items.
Application User Session Configuration	Health check, Troubleshooting, Data collection	Validates the application user session configuration of any Oracle Fusion application deployed in Oracle WebLogic Server. **Note** For the Application Name parameter, enter the deployment name in Oracle WebLogic Server, with a # symbol preceding the version, for example, SalesApp#V3.0.
Application User Session Run Time	Health check, Troubleshooting, Data collection	Summarizes the application user session run-time data of any Oracle Fusion application deployed in Oracle WebLogic Server.
Attachments Configuration	Health check, Troubleshooting, Data collection	Checks the attachments configuration for any Oracle Fusion application that is deployed on the Oracle WebLogic Server. Reports any configuration problems related to attachments, along with information on valid configuration options and how to correct the problem. **Note** For the Application Name parameter, enter the deployment name in Oracle WebLogic Server, with a # symbol preceding the version, for example, SalesApp#V3.0.

Data Security Run Time	Health check, Troubleshooting, Data collection	Summarizes the data security run-time data of any Oracle Fusion application deployed in Oracle WebLogic Server.
Descriptive Flexfields Run Time	Health check, Troubleshooting, Data collection	Summarizes the descriptive flexfield runtime data of any Oracle Fusion application deployed in Oracle WebLogic Server.
Extensible Flexfields Run Time	Health check, Troubleshooting, Data collection	Summarizes the extensible flexfield runtime data of any Oracle Fusion application deployed in Oracle WebLogic Server.
Flexfields Configuration	Health check, Troubleshooting, Data collection	Validates the flexfields configuration of any Oracle Fusion application deployed in Oracle WebLogic Server. **Note** For the Application Name parameter, enter the deployment name in Oracle WebLogic Server, with a **#** symbol preceding the version, for example, SalesApp#V3.0.
Key Flexfields Run Time	Health check, Troubleshooting, Data collection	Summarizes key flexfield runtime data of any Oracle Fusion application deployed in Oracle WebLogic Server.
Application Taxonomy Configuration	Health check, Troubleshooting, Data collection	Validates the application taxonomy configuration of any Oracle Fusion application deployed in Oracle WebLogic Server.
Application Taxonomy Run Time	Health check, Troubleshooting, Data collection	Summarizes the application taxonomy run-time data of any Oracle Fusion application deployed in Oracle WebLogic Server.

Data Security Configuration with Application User Session Prerequisite	Health check, Troubleshooting, Data collection	Validates the data security configuration of any Oracle Fusion application deployed in Oracle WebLogic Server after validating the application user session configuration. **Note** For the Application Name parameter, enter the deployment name in Oracle WebLogic Server, with a # symbol preceding the version, for example, SalesApp#V3.0.

Diagnostic Tests for Oracle Fusion Customer Relationship Management

The following table lists the diagnostic tests that can be run on Oracle Fusion Customer Relationship Management.

Test Name	Test Type	Purpose
Customer Hub Agreement Rules Dictionary Validation Test	Health check, Troubleshooting	Validates the agreement rules dictionary to eliminate syntax and definition errors.
Customer Hub Party Merge Metadata Loading Test	Health check, Troubleshooting	Loads customer hub party merge metadata.
Customer Hub Party Merge Result Validation	Health check, Troubleshooting	Validates Party Merge Results.
Customer Hub Resolution Request Status Check	Health check, Troubleshooting	Displays the reasons for resolution request failure or rejection.
Data Quality Engine Setup Diagnostic External Tests	Health check, Troubleshooting	External diagnostic tests for the data quality matching and cleansing engine setup.
Geography Duplicate Name or Code Report	Health check, Troubleshooting	Lists duplicate names or codes for both geographies and zones.
Geography Name Referencing Package Status	Health check, Troubleshooting, Data collection	Lists the status of the geography name referencing package for each country such as, defined and valid, not defined, or defined but invalid.
Geography Primary Code Report	Health check, Troubleshooting	Checks if there is only one primary code per geography. If there are any errors, a report lists the offending geographies, their names, and the number of primary occurrences.

Geography Primary Name Report	Health check, Troubleshooting	Checks if there is only one primary name per geography. If there are any errors, a report lists the offending geographies, their names, and the number of primary occurrences.
Geography Structure and Hierarchy Report	Data collection	Lists all countries defined, along with the structure, hierarchy, and number of geographies at each level.
Geography Structure Noncompliance	Health check, Troubleshooting	Lists entries that do not comply with the defined geography structure.
Geography Zone Gap Report	Health check, Troubleshooting	Lists entries that are potential gaps in zone definition.
Multiple Root Sales, Marketing, or Partner Organizations	Health check, Troubleshooting	Reports errors if there are multiple root organizations in an organization hierarchy.
Number of Resource Teams	Data collection	Reports the total number of resource teams defined.
Number of Resources	Data collection	Reports the total number of employees, contingent workers, and partner resources.
Number of Sales, Marketing, and Partner Organizations	Data collection	Reports the total number of sales, marketing, and partner organizations defined.
Organization Hierarchy with Internal and External Organizations	Health check, Troubleshooting	Reports an error if an organization hierarchy contains both internal organizations, such as sales and marketing, and external organizations such as partner organizations.
Organizations Without Managers	Health check, Troubleshooting	Displays warnings if any of the sales, marketing, or partner organizations do not have a manager.
Partner Resource Belongs to a Partner Organization Hierarchy That Is Not for His Company	Health check, Troubleshooting	Reports error if there exists partner resources which belong to partner organization hierarchies that are not for their associated partner company.
Partner Resource in Sales Or Marketing Organization	Health check, Troubleshooting	Reports an error if a partner resource is a member of a sales or marketing organization.
Partner Resource Member of an External Organization	Health check, Troubleshooting	Reports an error if a partner resource is a member of a sales or marketing organization.
Partner Resource Organization Member	Health check, Troubleshooting	Reports an error if any employee or contingent worker resource is a member of a partner resource organization.

Resource Has No Organization Membership	Health check, Troubleshooting	Reports a warning if there are resources who do not have any organization membership.
Resource Organization Not In Hierarchy	Health check, Troubleshooting	Reports a warning if there are sales, marketing, or partner organizations that are not part of any organization hierarchy.
Resources Have Multiple Managers	Health check, Troubleshooting	Warns if there are resources that report to multiple managers.
Resources with Multiple Organization Memberships	Health check, Troubleshooting	Reports a warning if there are resources with multiple organization memberships.
Resources with No Resource Role Assignments	Health check, Troubleshooting	Warns if there are resources that do not have any resource roles assigned to them.
Resources Without Managers	Health check, Troubleshooting	Displays warnings if any of the resources does not have a reporting manager.
Resources Without User Accounts	Health check, Troubleshooting	Reports error if any of the resources does not have a user account provisioned.
Territory Management Account Fact Validity	Health check, Troubleshooting	Verifies that the account fact entity is populated properly.
Territory Management BI Account Type Dimension Identical Members	Health check, Troubleshooting	Validates the consistency of the account type dimension members between Oracle BI and Oracle Fusion Territory Management applications.
Territory Management BI Auxiliary 1 Dimension Identical Members	Health check, Troubleshooting	Validates the consistency of the Auxiliary 1 dimension members between Oracle BI and Oracle Fusion Territory Management applications.
Territory Management BI Auxiliary 1 Dimension Parent Child Hierarchy	Health check, Troubleshooting	Retrieves parent child hierarchy dimension members and compares them to the online transaction processing Auxiliary 1 hierarchy dimension members.
Territory Management BI Auxiliary 2 Dimension Hierarchy	Health check, Troubleshooting	Validates the consistency of the Auxiliary 2 dimension hierarchies between Oracle BI and Oracle Fusion Territory Management applications.
Territory Management BI Auxiliary 2 Dimension Identical Members	Health check, Troubleshooting	Validates the consistency of the Auxiliary 2 dimension members between Oracle BI and Oracle Fusion Territory Management applications.

Territory Management BI Auxiliary 3 Dimension Hierarchy	Health check, Troubleshooting	Validates the consistency of the Auxiliary 3 dimension members between Oracle BI and the Territory Management application.
Territory Management BI Auxiliary 3 Dimension Identical Members	Health check, Troubleshooting	Validates the consistency of the Auxiliary 3 dimension members between Oracle BI and the Territory Management application.
Territory Management BI Customer Size Dimension Identical Members	Health check, Troubleshooting	Highlights if there are different customer size dimension members between Oracle BI and the territory management application. The customer size dimension members should be identical.
Territory Management BI Geography Dimension Hierarchy	Health check, Troubleshooting	Validates the consistency of the geography dimension hierarchies between Oracle BI and the territory management application.
Territory Management BI Geography Dimension Identical Members	Health check, Troubleshooting	Highlights if there are different geography dimension members between Oracle BI and the territory management application. The geography dimension members should be identical.
Territory Management BI Industry Dimension Hierarchy	Health check, Troubleshooting	Validates the consistency of the industry dimension hierarchies between Oracle BI and the Territory Management application.
Territory Management BI Others Dimension Members	Health check, Troubleshooting	Compares invisible members against territory management invisible members.
Territory Management BI Product Dimension Hierarchy	Health check, Troubleshooting	Validates the consistency of the product dimension hierarchies between Oracle BI and Territory Management application.
Territory Management BI Sales Accounts Dimension Data	Health check, Troubleshooting	Compares sales accounts dimension data against the territory management application sales dimension data.
Territory Management Business Intelligence Sales Accounts Validity	Troubleshooting	Selects Oracle BI sales account dimension data to compare to the sales account dimension data in Territory Management application.
Territory Management Cube Dimension Members Hierarchy Validation	Health check, Troubleshooting	Validates if the hierarchy structure of the dimension members in the Oracle Essbase cube matches with the hierarchy structure of the visible dimension members.

Territory Management Default Dimension	Health check, Troubleshooting	Returns a list of default dimensions. No more than one dimension should be marked as a default dimension.
Territory Management Denormalization Validity	Health check, Troubleshooting	Verifies the correctness of the references to the dimension members from the denormalization table used for the territory definition.
Territory Management Dimension Code Consistency	Health check, Troubleshooting	Verifies that all dimension members point consistently to the same dimension both through their foreign keys and through dimension codes.
Territory Management Dimension Member Type	Health check, Troubleshooting	Verifies that the dimension member type is either Normal, Others or Unspecified.
Territory Management Dimension Member Uniqueness	Health check, Troubleshooting	Verifies that dimension member integration identifiers are unique within one dimension.
Territory Management Dimension Members Sort Number Validation	Health check, Troubleshooting	Verifies the uniqueness of the dimension members sort numbers within sibling members. The sort order must be a number greater that zero.
Territory Management Dimension Subtype Validation	Health check, Troubleshooting	Verifies that dimension member subtype code is set properly for the Product dimension and left blank for all other dimensions.
Territory Management Essbase Cube Metrics Existence	Health check, Troubleshooting	Finds whether a metrics dimension is present in the Oracle Essbase cube.
Territory Management Industry Dimension Visibility Validation	Health check, Troubleshooting	Verifies that industry dimension members visibility selection is set correctly. Dimension members placed below the visibility level value should be marked as invisible.
Territory Management Leaf Dimension Members Sequence Value	Health check, Troubleshooting	Verifies the leaf dimension members sequence numbers. Low and high sequence numbers for sequential leaf dimension members should be the same.
Territory Management Missing Cube Dimensions	Health check, Troubleshooting	Lists the dimensions from the Oracle Fusion Territory Management schema which are missing in the Oracle Essbase cube.
Territory Management Oracle BI Industry Dimension Identical Members	Health check, Troubleshooting	Highlights if there are different Industry dimension members between Oracle BI and the territory management application. The Industry dimension members should be identical.

Territory Management Oracle BI Organization Type Dimension Hierarchy Validation	Health check, Troubleshooting	Validates the consistency of the organization type dimension hierarchies between Oracle BI and Oracle Fusion Territory Management applications.
Territory Management Oracle BI Organization Type Dimension Identical Members	Health check, Troubleshooting	Highlights if there are different organization type dimension members between Oracle BI and the territory management application. The members should be identical.
Territory Management Oracle BI Product Dimension Identical Members	Health check, Troubleshooting	Validates the consistency of the sales channel dimension members between Oracle BI and the territory management application.
Territory Management Oracle BI Sales Channel Dimension Identical Members	Health check, Troubleshooting	Validates the consistency of the sales channel dimension members between Oracle BI and Territory Management application.
Territory Management Oracle Essbase and Oracle BI Metrics Value Validation	Health check, Troubleshooting	Validates Oracle Essbase cube metrics values against Oracle Business Intelligence metrics.
Territory Management Oracle Essbase Cube Dimension Member Existence	Health check, Troubleshooting	Lists the dimension members from the Oracle Fusion Territory Management schema which are missing in the Oracle Essbase cube.
Territory Management Oracle Essbase Cube Missing Metrics	Health check, Troubleshooting	Finds the missing enabled territory management metrics.
Territory Management Oracle Essbase Others and Unspecified Members Existence	Health check, Troubleshooting	Lists the members of a dimension in Oracle Essbase cube which do not have special children OTHERS and UNSPECIFIED.
Territory Management Others Children Visibility	Health check, Troubleshooting	Verifies that none of the children of the special dimension members, such as Others, is marked as visible.
Territory Management Others Dimension Members	Health check, Troubleshooting	Validates the proper placement of the Other dimension members in the OLTP TM hierarchies. All members not visible should be placed under appropriate Other dimension members.
Territory Management Parent Child Uniqueness	Health check, Troubleshooting	Verifies that the combination of parent and child values are unique within one dimension. The uniqueness is required for the quota management application to work properly.
Territory Management Product Dimension Children	Health check, Troubleshooting	Verifies that no product dimension member that is not a product group has children.

Territory Management Product Dimension Members Integration Identifier	Health check, Troubleshooting	Verifies the proper split of the integration identifier and the value of the member subtype for Product dimension members: products and product groups.
Territory Management Product Dimension Visibility	Health check, Troubleshooting	Verifies that product dimension members visibility flags are set according to value of product dimension visibility level parameter.
Territory Management Production Partition Status Validation	Health check, Troubleshooting	Verifies status values for the production partition.
Territory Management Referential Integrity Validation for Active Territories	Health check, Troubleshooting	Checks if the active territories have valid references to the dimensions and dimension members in the Oracle Fusion Territory Management schema.
Territory Management Referential Integrity Validation for Historical Territories	Health check, Troubleshooting	Checks if the historical territories have valid references to the dimensions and dimension members in the Oracle Fusion Territory Management schema.
Territory Management Sequence For Parent	Health check, Troubleshooting	Reports all rows that have children with the highest or lowest sequence values not equal to the highest or lowest sequence values of the parent.
Territory Management Time Dimension Active Selection	Health check, Troubleshooting	Verifies that the time dimension is always marked as active.
Territory Management Unspecified Dimension Members	Health check, Troubleshooting	Reports dimension members where an unspecified child is required but not present in the Oracle Fusion Territory Management schema.
Trading Community Bulk Import Batch Information Web Services	Health check, Troubleshooting	Checks that all essential services for import used to update or retrieve information about the batch during bulk import are running.
Trading Community Data Import All SOA Components	Health check, Troubleshooting	Checks that all essential services for the data import process are running. This check includes the main bulk import process flow which calls all essential services for Data Import.
Trading Community Data Integration Public Web Service	Health check, Troubleshooting	Checks that the data integration public web service used to validate interface data and move data from interface tables to base tables is running.

Trading Community Employee Resources Web Service	Health check, Troubleshooting	Checks that the employee resources web service used to import employee resources into Oracle Fusion Human Capital Management is running.
Trading Community ESS Public Web Service	Health check, Troubleshooting	Checks that the ESS public web service for all data quality services is running. Data quality services include address cleansing, batch and registry deduplication.
Invalid Sales Account Type	Health check, Troubleshooting	Lists the records that do not have valid sales account type values.
Dimension Member Visibility Selection Policy	Health check, Troubleshooting	Lists the records that violate the hierarchy parent child visibility selection policy.
Invalid Customer Property Values	Health check, Troubleshooting	Lists the customer dimension members that do not have valid property values.
Dimension Member Query Health	Health check, Troubleshooting	Determines that the dimension member query can be executed without errors.
Dimension Member Base Hierarchy Columns Equality	Health check, Troubleshooting	Returns all rows where an identifier, name, or visibility selection appears in the hierarchy columns that does not match the corresponding base values.
Invalid Visibility Selection	Health check, Troubleshooting	Lists the records for which the visibility selection is invalid.
Duplicate Dimension Member Identifiers	Health check, Troubleshooting	Determines if there are dimension member rows sharing the same base identifier loaded.
Invalid Level	Health check, Troubleshooting	Lists the records for which the level is invalid.
Dimension Member Hierarchy Impurity	Health check, Troubleshooting	Reports any dimension members with corrupted ancestries for individual dimensions.
Dimension Member Required Values	Health check, Troubleshooting	Reports the records for which the identifier, name, or visibility selection value is null.
Dimension Member Sibling Name space Collision	Health check, Troubleshooting	Reports the sibling dimension member records which have the same name.
Invalid Product Group	Health check, Troubleshooting	Reports the product records with an invalid group selection.
Invalid Product Level	Health check, Troubleshooting	Lists the product records that do not have the same level as their parents.

Invalid Sales Channel Identifier	Health check, Troubleshooting	Lists the records whose identifier is not a concatenation of group and type with a tilde.

Diagnostic Tests for Oracle Fusion Financials

The following table lists the diagnostic tests that can be run on Oracle Fusion Financials.

Test Name	Test Type	Purpose
Asset Trace	Troubleshooting, Data collection	(Oracle Fusion Assets) Displays the descriptive, financial, and historical details of an asset in a specific book.
Asset Trace: Accounting Information	Troubleshooting, Data collection	(Oracle Fusion Assets) Displays the accounting details for accounting events performed on an asset in a specific book.
Assets Validate Bonus Rules	Health check, Troubleshooting, Data collection	(Oracle Fusion Assets) Validates the completeness and correctness of the Bonus Rule configurations and setups.
Assets Validate Book Controls	Health check, Troubleshooting, Data collection	(Oracle Fusion Assets) Validates the completeness and correctness of the Book Controls configurations and setups.
Assets Validate Calendars	Health check, Troubleshooting, Data collection	(Oracle Fusion Assets) Validates the completeness and correctness of the Calendars configurations and setups.
Assets Validate Categories	Health check, Troubleshooting, Data collection	(Oracle Fusion Assets) Validates the completeness and correctness of the Categories configurations and setups.
Assets Validate Ceilings	Health check, Troubleshooting, Data collection	(Oracle Fusion Assets) Validates the completeness and correctness of the Ceilings configurations and setups.
Assets Validate Fiscal Years	Health check, Troubleshooting, Data collection	(Oracle Fusion Assets) Validates the completeness and correctness of the Fiscal Years configurations and setups.
Assets Validate Methods	Health check, Troubleshooting, Data collection	(Oracle Fusion Assets) Validates the completeness and correctness of the Method configurations and setups.

Assets Validate Prorate Conventions	Health check, Troubleshooting, Data collection	(Oracle Fusion Assets) Validates the completeness and correctness of the Prorate Conventions configurations and setups.
AutoInvoice Interface Data	Data collection	(Oracle Fusion Receivables) This test collects data from the AutoInvoice interface related tables for a given column name and value.
Bank Statement Processing Diagnostics	Troubleshooting, Data collection	(Oracle Fusion Cash Management) Lists cash management bank statement processing diagnostics.
FUN Intercompany and Intracompany Rules	Troubleshooting, Data collection	(Oracle Fusion Financials Common Module) Provides the intercompany or intracompany rules to filter the data.
General Ledger Closing Validations	Health check	(Oracle Fusion General Ledger) Lists validations of closing items.
General Ledger Misclassified Accounts Validations	Health check	(Oracle Fusion General Ledger) Lists validations of accounts that are misclassified.
GL Transfer Diagnostics	Troubleshooting, Data collection	(Oracle Fusion Subledger Accounting) Lists the General Ledger transfer diagnostics.
IBY Payment Process Request Data Collector Report	Troubleshooting, Data collection	(Oracle Fusion Payments) Lists diagnostic information for IBY Payment Process Request.
Payables List	Data collection	(Oracle Fusion Payables) Lists diagnostics for payables invoices.
Payment Diagnostics	Troubleshooting, Data collection	(Oracle Fusion Cash Management) Lists cash management payment diagnostics.
Payment Schedule Corruptions	Health check	(Oracle Fusion Payables) Lists the payment schedule corruptions found.
Receipt Data	Data collection	(Oracle Fusion Receivables) Collects data for a given receipt from all the major tables.
Receipt Diagnostics	Troubleshooting, Data collection	(Oracle Fusion Cash Management) Lists cash management receipt diagnostics.
Transaction Data	Data collection	(Oracle Fusion Receivables) Collects data for a given transaction from all the major tables.

Diagnostic Tests for Oracle Fusion Functional Setup Manager

The following table lists the diagnostic tests that you can run from Oracle Fusion Functional Setup Manager. To access these diagnostic tests navigate to the Review Topology page in the Setup and Maintenance work area.

Test Name	Test Type	Purpose
Validate Export and Import Setup Business Object Service Registration	Health check, Troubleshooting, Data collection	Validates the definition and availability of business object services required to export and import setup data.
Validate Topology Information Registered by Provisioning	Health check, Troubleshooting	Performs health check on a newly provisioned environment for Oracle Fusion applications by verifying the topology information.
Validate Oracle Web Services Management Policy Manager	Health check, Troubleshooting	Validates the availability of OWSM Policy Manager in the WebLogic Domain where Oracle Fusion applications are deployed.
Validate Enterprise Application and Module End Point URLs	Health check, Troubleshooting	Validates end point URLs of enterprise applications and its modules deployed in the given WebLogic Domain.
Validate Portlet Producer Application Availability	Health check, Troubleshooting, Data collection	Validates the availability of the Portlet Producer application that hosts the setup tasks.
Validate Setup Portlet Provider Registration	Health check, Troubleshooting, Data collection	Validates the registration status of Portlet Producer required to launch the setup tasks in a portlet.
Validate Setup Provider Portlet Configuration	Health check, Troubleshooting, Data collection	Validates the end point URL for Portlet Producer required to launch the setup tasks from Oracle Fusion Functional Setup Manager.
Validate Consumer Oracle Web Services Management Policy Manager	Health check, Troubleshooting, Data collection	Validates the availability of OWSM Policy Manager in the WebLogic Domain where Oracle Fusion Functional Setup Manager is deployed.
Validate Provider Oracle Web Services Management Policy Manager	Health check, Troubleshooting, Data collection	Validates the availability of OWSM Policy Manager in the WebLogic Domain where the application hosting the setup task is deployed.

Diagnostic Tests for Oracle Fusion Human Capital Management

The following table lists the diagnostic tests that can be run on Oracle Fusion Human Capital Management.

Test Name	Test Type	Purpose
Person Address Usage Validation	Health check	Validates the integrity of person address usage data.

Address Validations	Health check	Validates the integrity of address data.
Benefits Setup Diagnostic Test	Health check	Provides information about benefits related to a specific person.
Goals Integrity Validations	Health check	Validates the integrity of data for goal management.
HRC - Event Types	Health check	Displays details of Event Types.
Human Resources - Accruals	Health check	Validates the integrity of the Accrual Plan data.
Person Benefits Diagnostic Test	Health check	Displays information about Person Benefits.
Performance Management Integrity Validations	Health check	Validates the integrity of the data for Performance Management.
Profile Integrity Validations	Health check	Validates the integrity of the data for Profile Management.
Program Information Diagnostic Test	Health check	Verifies Program design and related information.
Person Validations	Health check	Validates the integrity of person data.
Social Integrity Validations	Health check	Validate the integrity of the data for Network at Work.
Talent Review Integrity Validations	Health check	Validates the integrity of the data for Talent Review.

Diagnostic Tests for Oracle Fusion Procurement

The following table lists the diagnostic tests that can be run on Oracle Fusion Procurement.

Test Name	Test Type	Purpose
Define Purchasing Configuration-Validate	Data collection, Troubleshooting	Displays the data currently set up for configuration entities that control the behavior of the Purchasing application.
Award Negotiation Create Purchasing Document - Validate	Data collection, Troubleshooting	Displays the data associated with the creation of a purchasing document based on one specific completed negotiation.
Configure Requisitioning Business Function Validate	Data collection, Troubleshooting	Displays the data associated with a specific business unit and its suitability for use in creating requisitions.
Item Configuration Validate	Data collection, Troubleshooting	Displays the configuration and data associated with a specific item in the procurement catalog.
Manage Content Zone Validate	Data collection, Troubleshooting	Displays the catalog setup for specific user and requisitioning business unit.

Manage Purchasing Document Lifecycle - Validate	Data collection, Troubleshooting	Displays data associated to one specific Purchasing Document and any related Receiving and Invoicing.
Negotiation Responses Diagnostic Test - Validate	Data collection, Troubleshooting	Displays data associated with the responses to a specific negotiation.
Negotiations Diagnostic Test - Validate	Data collection, Troubleshooting	Displays data and information associated with a specific Negotiation.
Punchout Connectivity Validate	Data collection, Troubleshooting	Validates the connectivity involved in the Procurement Punchout process.
Requisition Details Validate	Data collection, Troubleshooting	Provides data associated with a specific requisition.
Search-by Keyword Validate	Data collection, Troubleshooting	Provides information associated with a specific procurement item keyword search.
Supplier Profile - Validate	Data collection, Troubleshooting	Provides data associated with the profile of a specific supplier record.
Supplier User Account - Validate	Data collection, Troubleshooting	Provides data associated with a specific supplier user and its creation.
Supplier Migration - Validate	Data collection, Troubleshooting	Provides data and verification information associated with the supplier records in the system.

Diagnostic Tests for Oracle Fusion Projects

The following table lists the diagnostic tests that can be run on Oracle Fusion Projects.

Test Name	Test Type	Purpose
Diagnose Expenditure Items Using Project	Troubleshooting	Diagnoses the expenditure items.
Plan Type Setup Diagnostic Tests	Troubleshooting	Diagnoses plan type setup-related issues for both the project plan and financial plan (budget and forecast).
Plan Version Diagnostic Tests	Troubleshooting	Diagnoses plan version-related issues for both the project plan and financial plan (budget and forecast), specific to a project.
Profile Option Diagnostic Test	Health check	Diagnoses issues in a specific profile option.
Project Control Setup Diagnostic Tests	Troubleshooting	Diagnoses setup-related issues with spread curves and period profiles.

Project Invoice Generation	Troubleshooting	Checks for missing information that would prevent invoice generation.
Project or Project Template Diagnostic Test	Troubleshooting	Diagnoses setup data issues in a specific project or project template.
Project Revenue Generation	Troubleshooting	Checks for missing information that would prevent revenue generation.
Summarization History	Health check	Tracks the history of summarization runs.
Summarization Overview	Health check	Provides an overview of summarization runs.
Summarization Process Data Diagnostic Test	Health check	Tracks a particular summarization process.
Summarization State Diagnostic Test	Health check	Tracks the progress of a given summarization run.
Summarized Contract Data	Health check	Provides an overview of summarized contract data.
Summarized Project Data Diagnostic Test	Health check	Provides an overview of summarized project data.

Diagnostic Tests for Oracle Fusion Supply Chain Management

The following table lists the diagnostic tests that can be run on Oracle Fusion Supply Chain Management.

Test Name	Test Type	Purpose
Inventory Item Transaction	Data collection	Collects information about inventory transactions recorded against an identified item number and organization.
Item Cost Data Collection	Data collection	Collects item cost data.
Order Orchestration Details	Data collection	Collects orchestration details about an order.
Physical Inventory Detail	Data collection	Collects information for a given physical inventory, including details associated with the tags and adjustments for the physical inventory.
Receiving Document Activity	Data collection	Collects information about a receiving document and the receipts and transactions recorded against the document.

Common Diagnostic Tests

Application User Session Run Time Diagnostic Test

Use the Application User Session Run Time diagnostic test to analyze the application user session run-time data of any Oracle Fusion application.

Run this test from the Diagnostic dashboard.

Parameters

Application User Session Cookie

Enter the cookie to identify the user session that you want to analyze. To obtain the session cookie value:

1. Run the Application User Session Configuration diagnostic test to make sure that the ApplSession configuration values for your Oracle Fusion application are correct.
2. Use a valid user name and password to sign in to your Oracle Fusion application.
3. Display the list of cookies in your browser, according to instructions for the browser.
4. In the cookies listed for your domain site, select the cookie named ORA_FND_SESSION_<DATABASE_SID>. Your domain site is the host in the URL, for example oracle.com in the URL http://example.us.oracle.com, and <DATABASE_SID> is your database session ID.
5. Inspect the **Content** field, which has the format pillar_name:session_cookie_value:timestamp. The value that you need to enter for the Application User Session Cookie parameter is the session_cookie_value part, which appears between two colons.

If you cannot locate the cookie in step 4, then no application user session has been created for your application.

FAQs for Troubleshooting

What's an incident?

An incident is a collection of diagnostic information related to a critical application error. This information shows the state of the application at the time the problem occurred. Incidents are automatically forwarded to your help desk. If you encounter an error message for an issue severe enough to prevent you from continuing in your work, then an incident is automatically created. Any diagnostic tests associated with the error message would also run automatically, with the results added to the incident. Your help desk can also manually create incidents.

What are troubleshooting options?

Troubleshooting options control what and how diagnostic information is captured in log or trace files while you reproduce a problem that you previously encountered. Your help desk can use this information to troubleshoot your issue. If you are asked to set these options, then your help desk would tell you the exact settings to use and when to reproduce the issue. Depending on the settings you use, or if you enable all the options, you can expect an impact on performance when you use the application.

Access troubleshooting options from the global area by selecting **Help** - **Troubleshooting** - **Troubleshooting Options** . If you do not see this menu item, then your help desk can make it available to you.

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Accessibility

Accessibility Features: Explained

Accessibility features in Oracle Fusion Applications support the use of assistive technology products, such as screen readers, and facilitate in performing functions using the keyboard instead of the mouse. For information on general accessibility features that are also available in Oracle Fusion Applications, see http://www.oracle.com/us/corporate/accessibility/assistive-tech-oracle-html-wp-163157.pdf. The following definitions provide more details, some of which are specific to Oracle Fusion Applications.

Skip Navigation Links

In Oracle Fusion Applications, each page has a **Skip to content** link, which takes you to the main content on the page. The link goes to the first area after the global area, which is usually the regional area if available, or otherwise the local area.

Additional Role and State Labels

Labels of various user interface components, for example menus and regional or local area panes, include role and state labels when you use Oracle Fusion Applications in the screen reader mode. These labels provide information on the purpose and current state of the item. In several cases, the Web Accessibility Initiative - Accessible Rich Internet Applications (WAI-ARIA) standards are leveraged for this role and state information.

In addition, required user interface elements, for example fields or text boxes, are labeled with the state text of **required** in the screen reader mode.

Isolated Display

When a popup, menu, or dialog box is opened in screen reader mode, display is solely isolated on the open component until you close it. In screen reader mode, user interface elements that are in error, for example with invalid data entry, are identified and shown in an isolated popup.

Content Change Announcements

In the screen reader mode, a WAI-ARIA live region is used to announce pertinent changes in the application, for example the rendering of partial content, progression of progress indicators, or changes in menu and dialog box state when you open or close them.

Alternatives to Drag and Drop

Pages that have drag and drop operations also have alternate methods of operation.

Accessibility Preferences: Explained

Use the accessibility preferences to select accessibility modes for Oracle Fusion Applications. Access accessibility preferences from the global area by clicking the **Accessibility** link or selecting **Personalization** - **Set Preferences** - **Accessibility** .

Accessibility

The screen reader mode provides an alternate rendering of the user interface components that is enhanced for use by screen reader users and keyboard-only users.

Color Contrast

The high contrast mode provides visual content that is compatible with operating systems or browsers that have high contrast features enabled. For example, the use of background images and background colors is optimized to prevent the loss of visual information while in high contrast mode. This mode does not provide much benefit if you are not also using your browser or operating system's high contrast mode. Depending on your needs, you might also find it beneficial to use the large fonts mode with the high contrast mode.

Font Size

The large font mode provides visual content that is compatible with browsers that are set to larger font sizes or have zoom capabilities. In the medium font mode, most text and many user interface containers have a fixed size to provide a consistent and well-defined look. In large font mode, text and containers have a scalable size. If you are not using larger fonts or browser zoom capabilities, then use the medium font mode. Depending on your needs, you might also find it beneficial to use the high contrast mode with the large font mode.

Keyboard Shortcuts: Explained

Keyboard shortcuts include access keys and accelerators that allow you to quickly perform common actions, such as saving or moving to the next set of records in a data table, using the keyboard. These shortcuts let you perform a function without having to manually move focus to the relevant user interface component.

An access key is a character assigned to a specific user interface component on a given page. For example, in English the **Save and Close** button is assigned the letter **S**, which is underlined in the button text. To jump to the assigned component, press and hold at least one other key along with the designated access key. Your Web browser determines which other key or keys to press, and whether you just shift focus to the component or also immediately perform a function. All access keys work the same in both the default and screen reader mode.

An accelerator is a defined combination of keys that you can use to navigate or perform a function, no matter which browser you are using. Some keystrokes are specific to the default or screen reader mode.

Accelerators in Oracle Fusion Applications are available for

- Any page
- Simple user interface components
- Tables
- Trees
- Rich text editors
- Calendars

Any Page

This table lists the keyboard shortcuts that you can use on any page, in either the default or screen reader mode.

Function	Keystroke	Description
Focus in page	• Tab • Shift + Tab	Move focus among the components on a page.
Focus in component	Arrow keys	Navigate through items within a component, for example menu items within a menu.
Activate item	• Enter • Space bar	Activate the item in focus, for example press the selected button or open a link.

Simple Components

This table lists the keyboard shortcuts for various simple user interface components. The focus must be on the corresponding component or subcomponent for the accelerator to work, except where specified in the description.

Note
Each keyboard shortcut is available in both the default and screen reader mode except where specified otherwise.

Component	Function	Keystroke	Description
Active data	Open active data dialog box	Ctrl + Alt + R	Used in screen reader mode only on pages with active data, for you to see information about data that is automatically updated on the page.
Choice list	Open	Alt + Arrow Down	Open a list of values, for example the list of categories for the search in the global area.
Choice list	Select an item	Enter	Select the item in focus in a list of values.
Choice list	Select all items	Ctrl + A	Select all items in a list of values, if multiple selection is allowed.
Choice list	Select items from top to current	Ctrl + Shift + Home	Select all items from the top of the list of values to the item in focus, if multiple selection is allowed.
Choice list	Select items from current to bottom	Ctrl + Shift + End	Select all items from the item in focus to the bottom of the list of values, if multiple selection is allowed.
Context menu	Open	• Ctrl + Alt + M • Menu	Open a contextual menu where available, for example for a row in a table. The menu would contain actions you can perform on the selected row.

Dialog box	Toggle between dialog boxes	Ctrl + Alt + W	Toggle focus between open dialog boxes. Not applicable in screen reader mode because only one dialog box can be open at a time in that mode.
Disclosure icon	Open a closed section, pane, or region	• Enter • Arrow Down	Open a currently closed or hidden part of a component, for example a dashboard region or details section.
Disclosure icon	Close an open section, pane, or region	• Enter • Arrow Up	Close a currently open part of a component, for example a dashboard region or details section.
Menu	Toggle between detached menus	Ctrl + Shift + W	Toggle focus between open menus that are detached. Detachable menus are not available in screen reader mode.
Splitter	Focus on next splitter	Ctrl + Alt + P	Move focus to the next splitter, which is the divider between areas on a page, for example between the regional area and local area.
Splitter	Move splitter	Arrow keys	Move the splitter in focus in the direction of the arrow key. For example, if you have the splitter between the regional and local area in focus, then use the left arrow key to move the divider to the left so that you give more space to the local area.
Splitter	Open or close	Enter	Open or close an area that the splitter in focus is adjacent to. For example, use the splitter between the regional and local area to hide or display the regional area.
Tab	Remove	Ctrl + Alt + F4	Remove the tab in focus, only if removing tabs is allowed.

Tables

These keyboard shortcuts apply to both regular tables and tree tables, which present data in a hierarchical manner, except where specified otherwise.

This table lists the keyboard shortcuts for the entire table, in the default mode.

Function	Keystroke	Description
Focus on table	Tab	Access the table by keyboard, which takes you initially inside the first column header.
Filter	Enter	With focus on any of the table filter cells, run the filter according to current values. This function does not apply to tree tables.
Select all rows	Ctrl + A	With focus anywhere in the table, select all the rows in the table. This function is not available in all tables.

This table lists the keyboard shortcuts for column headers, in the default mode.

Note

Not all tables allow multiple column selection or any column selection.

Function	Keystroke	Description
Move focus	Arrow Left, Arrow Right	Move focus from one column header to another. For tables with column groups, move focus from a parent column to the first child column. Subsequently use either key to move between the child columns, or on to the next column without a group.
Toggle between parent and child	Arrow Up, Arrow Down	Toggle between parent and child column headers in a column group.
Sort	Enter	With focus on the header for a sortable column, sort the table data by the column. Press the key again to do a reverse sort.
Move	Ctrl+Shift+Arrow Left, Ctrl +Shift +Arrow Right	With focus on a column header, move the corresponding column to the left or right.
Select	Space	With focus on a column header, select the corresponding column. Any previously selected columns are deselected.
Move focus and add to selection	Shift + Arrow Left, Shift + Arrow Right	With focus on a column header, move focus to previous or next column and add the column to the current selection.
Select range	Shift + Space bar	Select all columns from the previously selected column to the one with the column header currently in focus.
Add or remove from selection	Ctrl + Space bar	With focus on a column header, add or remove the corresponding column from the group of selected columns.

Deselect all	Esc	With focus on any column header, deselect all columns.
Move focus to data	Tab	With focus on any column header, move focus to the first available data cell that allows user input, for example a cell with a choice list or a link.
Open context menu	• Ctrl + Alt + M • Menu	With focus on a column header, open the context menu for the corresponding column, where available.

This table lists the keyboard shortcuts for row headers, in the default mode. A row header is the cell preceding each row where you can click to select the row. Row headers might not have text or other content, and not all tables allow multiple row selection or any row selection.

Function	Keystroke	Description
Move focus	Arrow Up, Arrow Down	Move focus from one row header to another.
Select	Space bar	With focus on a row header, select the corresponding row. Any previously selected rows are deselected.
Select and move focus	Arrow Left	With focus on a row header, select the corresponding row and move focus to the data cells.
Select range	Shift + Space bar	Select all rows from the previously selected row to the one with the row header currently in focus.
Add or remove from selection	Ctrl + Space bar	With focus on a row header, add or remove the corresponding row from the group of selected rows.
Select all	Ctrl + A	With focus on any row header, select all rows. This function is not available in all tables.
Deselect all	Esc	With focus on any row header, deselect all rows.
Highlight	Arrow Right	With focus on a row header, highlight the corresponding row. Any previously selected rows are deselected. The row remains highlighted until you press the Arrow Left key. Most of the keyboard shortcuts for row headers do not work in the highlight mode.
Select highlighted row	Arrow Left	Select the currently highlighted row and exit the highlight mode. Any previously selected rows are deselected.

Edit	F2	With focus on a row header, enable the corresponding row for edit, where available. Press Esc to return focus to the row header and set the row to read-only.

This table lists the keyboard shortcuts for the data cells, in the default mode. Not all tables allow multiple row selection, any row selection, or edits.

Function	Keystroke	Description
Scroll horizontally	Alt + Page Up, Alt + Page Down	With focus on any data cell, scroll to the right (Alt + Page Up) or left (Alt + Page Down).
Scroll by one row	Arrow Up, Arrow Down	With no rows selected, scroll the table up or down by one row.
Scroll by one page	Page Up, Page Down	With now rows selected, scroll the table up or down by one page. For example, if the table displays 10 rows at a time, then press Page Down to display rows 11 through 20.
Select multiple rows	Shift + Arrow Up, Shift + Arrow Down	With a row already selected, add the row above or below to the selection.
Select next or previous row	Arrow Up, Arrow Down	With a row already selected, move the selection to the previous or next row.
Select row one page up or down	Page Up, Page Down	With a row already selected, move the selection to the row one page up or down. For example, if the table displays 10 rows at a time and row 2 is currently selected, then press Page Down to move the selection from row 2 to row 12.
Move focus to column header	Arrow Up	With the first row selected, move focus to the first column header.
Move focus to next or previous input cell	Tab, Shift + Tab	Move focus to the next (Tab) or previous (Shift + Tab) data cell that allows user input, for example a cell with a choice list or a link.
Move focus to input cell in next or previous row	Tab, Shift + Tab	With focus on the last input data cell in the row, move focus to the first input cell in the next row (Tab). With focus on the first input data cell in the row, move focus to the last input cell in the previous row (Shift + Tab)
Move focus to first input cell in next row	Enter	With focus on any input cell in the row, move focus to the first input cell in the next row.

Exit edit mode	Esc	With focus on any input cell in the row, return focus to the corresponding row header and set the row to read-only.
Open context menu	• Ctrl + Alt + M • Menu	With focus on a data cell, open the context menu for the corresponding row, where available.
Open hierarchy selector	Ctrl + Alt + ^	With focus on the hierarchy icon that can appear next to the top node, open the hierarchy selector, which lets you navigate to levels above the top node. This function is available only for tree tables.
Expand or collapse	Arrow Left, Arrow Right	With focus on a disclosure icon for a parent node, expand (Arrow Right) or collapse (Arrow Left) the rows containing the child nodes. This function is available only for tree tables.

This table lists the keyboard shortcuts for tables, in the screen reader mode. Not all tables have the functionality described, for example row headers or column selection.

Table Component	Function	Keystroke	Description
Filter cell	Filter	Enter	With focus on any of the table filter cells, run the filter according to current values. This function does not apply to tree tables.
Column header	Select or deselect all rows	Space bar	With focus on the **Select** column header check box, select or deselect all rows. This check box is only available for tables that allow multiple row selection.
Column header	Select column	Space bar	With focus on a check box or option in a column header, select the corresponding column. Previously selected check boxes or options are deselected.
Column header	Move column	Ctrl + Shift + Arrow Left, Ctrl + Shift + Arrow Right	With focus on a column header, move the corresponding column to the left or right.

Column header	Resize column	Shift + Arrow Left, Shift + Arrow Right	With focus on a column header, decrease (Shift + Arrow Left) or increase (Shift + Arrow Right) the corresponding column by 25 pixels.
Column header	Sort data	Enter	With focus on the header for a sortable column, sort the table data by the column. Press the key again to do a reverse sort.
Column header	Open context menu	Ctrl + Alt + M	With focus on a column header, open the context menu for the corresponding column, where available.
Row header	Select row	Space bar	With focus on a check box or option in a row header, select the corresponding row. Previously selected check boxes or options are deselected.
Data cell	Open context menu for row	Ctrl + Alt + M	With focus on a data cell, open the context menu for the corresponding row, where available.
Data cell	Open context menu for body	Ctrl + Alt + B	With focus in the table body but outside any row, open the context menu for the table body, where available.
Data cell	Open hierarchy selector	Ctrl + Alt + ^	With focus on the hierarchy icon that can appear next to the top node, open the hierarchy selector, which lets you navigate to levels above the top node. This function is available only for tree tables.

Trees

Trees display a hierarchical list of objects and provide controls to help you navigate through the hierarchy. Trees are not the same as tree tables, which are presented in table format with each item in the hierarchy as a row.

This table lists the keyboard shortcuts for trees in the default mode. Not all trees have multiple selection or any selection enabled.

Function	Keystroke	Description
Expand or collapse node	Arrow Left, Arrow Right	With focus on a disclosure icon for a parent node, expand (Arrow Right) or collapse (Arrow Left) the branch to display or hide the child nodes.

Move focus and selection	Arrow Up, Arrow Down	With focus on a node, move focus to the previous or next node. If selection is also enabled, then the new node is also selected.
Move focus	Ctrl + Arrow Up, Ctrl + Arrow Down	With focus on a node, move focus to the previous or next node, but do not change node selection.
Select or deselect nodes	Ctrl + Space bar	Toggle selection for the node in focus when navigating the tree using the Control and Arrow keys.
Select contiguous nodes	Shift + Arrow Up, Shift + Arrow Down	With focus on a node that is selected or not, add the previous or next node to the selection.
Select noncontiguous nodes	• Space bar • Ctrl + Space bar	Add or remove noncontiguous nodes from the selection when navigating the tree using the Control and Arrow keys.
Select all nodes	Ctrl + A	With focus anywhere in the tree, select all nodes.
Open context menu	Ctrl + Alt + M	With focus on a node, open the context menu for the corresponding node, where available.
Open hierarchy selector	Ctrl + Alt + ^	With focus on the hierarchy icon that can appear next to the top node, open the hierarchy selector, which lets you navigate to levels above the top node.

This table lists the keyboard shortcuts for trees in the screen reader mode. In this mode, a tree has an additional column of controls for node selection per row. The next column in the tree contains the tree nodes themselves.

Function	Keystroke	Description
Expand or collapse node	Enter	With focus on a disclosure icon for a parent node, expand or collapse the branch to display or hide the child nodes.
Select node	Space bar	Tab to the check box or option for selection and press Space bar to select the corresponding node.
Select all nodes	Space	Tab to the check box in the Select column header and press Space bar.
Open context menu	Ctrl + Alt + M	With focus on a node, open the context menu for the corresponding node, where available.
Open hierarchy selector	Ctrl + Alt + ^	With focus on the hierarchy icon that can appear next to the top node, open the hierarchy selector, which lets you navigate to levels above the top node.

Rich Text Editors

The functionality and keyboard shortcuts described here apply only to the standard rich text editor found throughout Oracle Fusion Applications. Some applications may use third-party rich text editors that work differently.

In the default mode, all toolbar controls appear on top of the editing area. In the screen reader mode, you can use the rich text editor only in source code mode, and none of the toolbar controls are displayed. There are no keyboard shortcuts in the screen reader mode.

This table lists the keyboard shortcuts for rich text editors in the default mode.

Function	Keystroke	Description
Move focus	Tab	Move focus to the rich text editor itself, then enabled toolbar controls, then the editing area.
Rich text mode	Ctrl + Alt +R	Change the mode to enable editing of rich text.
Source code mode	Ctrl + Alt + C	Change the mode to enable editing of the source code.
Undo	Ctrl + Z	Undo the last operation.
Redo	Ctrl + Y	Redo the last undone operation.
Clear styles	Ctrl + Shift + S	Clear all the styles that were applied on the selected text.
Bold	Ctrl + B	Toggle boldface on the selected text.
Italic	Ctrl + I	Toggle italicizing the selected text.
Underline	Ctrl + U	Toggle underlining the selected text.
Subscript	Ctrl + Alt + -	Toggle subscript on the selected text.
Superscript	Ctrl + Alt + +	Toggle superscript on the selected text
Strikethrough	Ctrl + 5	Toggle strikethrough on the selected text
Left alignment	Ctrl + L	Left align the line with the cursor.
Center alignment	Ctrl + E	Center align the line with the cursor.
Right alignment	Ctrl + R	Right align the line with the cursor.
Justify	Ctrl + J	Fully justify the line with the cursor.
Bulleted list	Ctrl + Shift + L	Convert selected lines into a bulleted list.
Numbered list	Ctrl + Alt + L	Convert selected lines into a numbered list.
Indent	Ctrl + M	Increase the indentation of the line with the cursor.
Outdent	Ctrl + Shift + M	Decrease the indentation of the line with the cursor.

Add Link	Ctrl + H	Add a hyperlink to the selected text.
Remove Link	Ctrl + Shift + H	Remove the hyperlink from the selected text.

Calendars

Calendars have various views: day, week, month, and list. Each scheduled event on the calendar is an activity.

This table lists the keyboard shortcuts for calendars in the default mode. In the list view, use the keyboard shortcuts for tables.

Calendar View	Function	Keystroke	Description
All	Navigate toolbar	Tab, Shift + Tab	With focus on a toolbar control, move focus to the control to the right (Tab) or left (Shift + Tab).
All	Open context menu	Ctrl + Alt + M	With focus on an activity or empty time slot, open the context menu for the corresponding item, where available.
Day	Move focus	• Arrow keys • Tab, Shift + Tab	With focus on an activity, move focus to another activity. Tab moves from left to right and top to bottom, and Shift + Tab goes the other direction.
Week	Move focus on days	• Arrow Left, Arrow Right • Tab, Shift + Tab	With focus on a day of the week, move focus to the previous (Arrow Left, Shift + Tab) or next (Arrow Right, Tab) day.
Week	Move focus to adjacent activity in previous or next day	Arrow Left, Arrow Right	With focus on an activity, move focus to the activity in the previous or next day that is the most similar in time slot. If no activities exist for the entire day, then move focus to the day of the week.

Week	Move focus between activities in a day	Arrow Up, Arrow Down	With focus on an activity, move focus to the next or previous activity in the day. • If focus is on the first activity in a day, then Arrow Up moves focus to the day of the week • If focus is on a day of the week, then Arrow Down moves focus to the first activity within that day. Nothing happens if no activities exist for the entire day. • If focus is on a day of the week, then Arrow Up does nothing.
Month	Move focus on dates	Tab, Shift + Tab	With focus on a date, move focus to the previous (Shift + Tab) or next (Tab) date. If focus is on the last day of the week, Tab moves focus to the first day of the following week.

Month	Move focus on dates, activities, or **+n more** links	Arrow Up, Arrow Down	With focus on a date, activity, or **+n more** link, move focus to the next item of any type in the corresponding direction. For example: • If a date is in focus, then Arrow Up moves focus to the last activity of the day directly above. • If focus is on the first activity in a day, then Arrow Up moves focus to the date. All-day activities receive focus only when Arrow keys are used to navigate through activities within a day on which the all-day activity starts. Otherwise, all-day activities are skipped.
Month	Move focus between dates, activities, or **+n more** links	Arrow Left, Arrow Right	With focus on a date, activity, or **+n more** link, move focus to the most similar item in the corresponding direction, for example from one activity to another that is the most similar in time slot. If focus is on the last day of the week in the first week of the month, then Arrow Right moves focus to the first day of the week in the second week of the month.

This table lists the keyboard shortcuts for calendars in the screen reader mode, with the specified calendar component as the item in current focus. Only the list view is available in this mode.

Calendar Component	Function	Keystroke	Description
Activity	Open context menu	Ctrl + Alt + M	With focus on an activity, open the context menu, where available.
Activity	Move focus to today	Arrow Left	With focus on any activity, move focus to today's date.

Activity	Move focus to previous or next activity	• Arrow Up, Arrow Down • Tab, Shift + Tab	With focus on an activity, Arrow Up or Down moves focus to the next or previous activity. • If focus is on the first activity in a day, then Arrow Up moves focus to the last activity in the previous day, and Arrow Left or Shift + Tab moves focus to the date. • If focus is not on the first activity of the day, then Tab can also be used to move focus to the next (Tab) or previous (Shift + Tab) activity. • If focus is on the last activity of the day, then Arrow Right or Tab moves focus to the next day's date.
Date	Move focus to previous or next date	Arrow Up, Arrow Down	With focus on a date, move focus to another date.
Date	Move focus to first activity of current date	• Arrow Right • Tab	With focus on a date, move focus to the first activity of the current date.
Date	Move focus to last activity of previous date	• Arrow Left • Shift + Tab	With focus on a date, move focus to the last activity of the previous date.

Glossary

action

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

activity stream

A feature that tracks and displays actions and messages from people whom you are connected to in your social network, as well as activities from the application.

business object

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

connection

A user who is a member of your social network, or the relationship that establishes the user as part of your network.

database resource

An applications data object at the instance, instance set, or global level, which is secured by data security policies.

entitlement

Grants of access to functions and data. Oracle Fusion Middleware term for privilege.

flexfield

Grouping of extensible data fields called segments, where each segment is an attribute added to an entity for capturing additional information.

gallery

A searchable collection of portraits that combines the functions of the person directory with corporate social networking and self-service applications for both workers and managers.

global area

The region across the top of the user interface. It provides access to features and tools that are relevant to any page you are on.

local area

The region in the middle of the work area, where you do most of your work.

offering

A comprehensive grouping of business functions, such as Sales or Product Management, that is delivered as a unit to support one or more business processes.

Oracle Fusion Applications Search

A special type of search based on technology that differs from that of most other searches in Oracle Fusion Applications. Oracle Fusion Applications Search is available in the global area and other places.

privilege

A grant or entitlement of access to functions and data. A privilege is a single, real world action on a single business object.

process

A program that you schedule and run to process data and, if appropriate, generate output as a report. Also known as scheduled process.

process set

A process that consists of multiple individual processes or other process sets.

Query By Example

The fields directly above table column headers in which you can enter values for filtering the data in the table.

regional area

The collapsible region on the left side of the work area, containing controls that refresh, manipulate, or otherwise update the local area.

role

Controls access to application functions and data.

sandbox

A runtime session that commits changes out of reach of mainline users.

space

A work area that supports people working in a group of any size, organized around an area of interest or a common goal.

tree

Information or data organized for display into a hierarchy with one or more root nodes connected to branches of nodes. Each node corresponds to data from one or more data sources. A tree must have a structure.

workflow

An automated process in which tasks are passed from a user, a group of users, or the application to another for consideration or action. The tasks are routed in a logical sequence to achieve an end result.