Southern Illinois University CARBONDALE

Getting Started: Logging On & Off (LC #1)

Overview

You will access Oracle Applications using the Administrative Information System (AIS) Login Page and Home Page. These pages are Internet browser web pages.

AIS Oracle applications can be either HTML-based (web-based) or forms-based. HTML/Web-based applications, also referred to as self-service applications, are optimized for ease of first-time use. Forms-based applications are optimized for processing a large volume of transactions. When forms-based applications are accessed, a Java plugin is activated and runs in the background while the system accesses Oracle Applications.

Accessing AIS Home Page

- The AIS Home Page URL: http://oit.siu.edu/ais provides access to various elements of the system. To access these elements, you will use links listed in a panel on the left side of the Web Page.
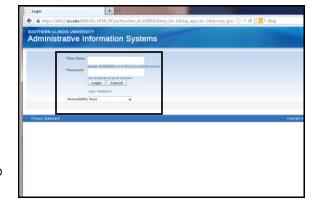
Login to AIS Production

Among the elements listed is the **Production** link. You will click this link to access the Production web page. Alternately, enter the URL: http://oit.siu.edu/ais/production/index.php to go directly to the AIS Production webpage.

- It is recommended that you bookmark this web page for future reference. **Important a**nnouncements regarding changes in system requirements, AIS maintenance, downtime, etc., will be posted on the Production web page. Users should check this page, occasionally, for updates.

- To begin, from the Production web page, locate and click the link, **CONNECT TO: AIS PRODUCTION SYSTEM**.

Note: Depending on your browser's security settings, you may get a **Security Warning** dialogue window. Click "Yes" on the Security Warning box to open the web page.

- When the link, CONNECT TO: **AIS PRODUCTION SYSTEM** is selected, the Administrative Information Systems **Login** page opens.
  - A **User Name** and **Password** are required to Login.

- This page also contains a **Login Assistance** link.
  - You can use this link to quickly resolve login problems relative to your Password. More on this topic later.

- For ADA compliance, an **Accessibility** option is also available. IGNORE this option, unless using Screen Reader Optimized computer access.

User Name

- The User Name for SIUC employees will be your Network ID: SIU85xxxxxxx

- The User Name for SIUE will be your e-id (EVILLE).

- The User Name for SIUSOM employees will be your **Entire Email Address**: _____@siumed.edu

- Enter your User Name, respectively.

Password

- Enter your Password and click the Login button.
  - If this is your initial log in, you can use the Login Assistance feature to set a Password. Refer to that section in this document for assistance.

IMPORTANT: The same Login information is used to access both Human Resources Self-Service (HRSS) and AIS Production. If you currently have access to HRSS, then you will use that User Name and Password to Login to AIS Production and it is not necessary to complete the Login Assistance process.

AIS Home Page

When Login is successful, your PERSONAL Home Page will display.

Main Menu

- Beneath the AIS Home Page heading, in the left column is your **Main Menu**, which contains your assigned Responsibilities and related functions.

- Both Oracle forms and web-based/self-service applications are accessed from the Main Menu. The functions for each Responsibility are nested directly below the folder.

- SINGLE click on the (+) plus in front of the Responsibility to access available functions. If the function you need is not visible, continue to click plus (+) to expand the subfolders, until the needed form or web page is visible.

- When menu items are expanded to the lowest level, an icon appears in front of the function.
  - The icon that resembles a Domino indicates a link to a Form; clicking on the link opens the associated form in an Oracle Application.
  - The icon that resembles a Page indicates a link to a web page; clicking it will open the associated page.

Opening a Form

- To open a form, click on the icon in front of the function. A **Warning-Security** window appears the first time you access a form.
  - **Click the checkbox** in front of the text: "*Always trust content from the publisher.*"
  - Then, select the **Run** button at the bottom of the page.

- A series of windows will appear very quickly on your screen while the system is being accessed.
  - A BROWSER window with a warning sign that says, IMPORTANT: Do not close this window, will appear on your screen. The Browser window must remain open while you are working in the Applications.

- The Application Navigator displays briefly and then the form selected from the Main Menu will open.

IMPORTANT: If you leave your AIS session inactive for 45 minutes, you will be automatically timed-out of the system. You will have to re-enter your Password to return to the last active form/ window.

Exiting Applications

- To exit an Oracle application, you must first close all open forms.
  - To close the forms one at a time, click the **Oracle** icon, top, left corner of the Window Title Bar.
  - To close all forms and return to the Application Navigator Window,
    Click on the **File** menu and select the **Close Form** option.
    Or, click the Close Form icon (resembles an open folder) on the Toolbar.

- From the Application Navigator, select the **File** menu and the **Exit Oracle Applications** option.

- A **Caution** window displays; select **OK**.

- If you are using tabbed browsing, click on the associated Browser tabs until all windows are closed and you are returned to your AIS Home Page.

Logout

The Logout process is not finished by closing forms and exiting Oracle Applications. Your User Name still appears in the system as ACTIVE, even though you have completed these steps.

- To completely exit the system, click the **Logout** link in the top right corner, or bottom of the page.

- When your Login page re-appears, you have completed the Logout process. Close your Browser.

Getting Started - Login Assistance (LC #2)

New users can create their own Password using the Login Assistance link. Current users can also re-set a Password using the Login Assistance link.

- To create a Password, begin by clicking the Login Assistance link on the Login window.

- When the Login Assistance window opens, enter your User Name and click the Forgot Password button.
  - User Name for SIUC employees = SIU85xxxxxxx
  - User Name for SIUSOM employees = your entire email address; UNLESS you are classified as SMC extra help, a Graduate Assistant or Student.
  - User Name for SIUE will be your e-id (EVILLE).

- When the Confirmation screen appears, click OK.

- This returns you to the Login screen; after a few minutes, check your email.
  - You should have received an Email from SIU AIS Notification with a Subject Line: FYI: Password Reset.
  - Reminder to SIUC employees: The system will send an email to your _____@siu.edu email account.

- Open the email; locate and select the link, Reset your password.
  - Ignore non-essential information in the email, e.g. numbers, etc.

Reset Password

- Clicking the *Reset your Password* link in the notification email opens the **Reset Password** window.

- Enter your **Username**.

- Next, create a new **Password,** following the standards listed on the right. Then, enter your New Password, *twice* in the respective fields.

- When finished, click the **Confirm Password** button.

- A **Confirmation** window appears; click the **OK** button.

- The Login screen reappears.
  - Enter your **User Name;** press **Tab.**
  - Enter your new **Password**.
  - Click the **Login** button.

Password Standards are:
- Must be changed every 365 days
- Cannot be reused
- Must be between 16 and 30 characters in length
- May include upper case and lower case letters
- May contain one or more of these special characters: ? .] [} { - ! * + _ ~
- May include spaces
- May be in the form of a passphrase, e.g. "Fido + 1 makes three!"

Avoid the Following:
- DO NOT use passwords derived from your user name.
- DO NOT use names of family, close friends or pets.

Login – Error

- If you enter a wrong User Name or Password, an error appears at the top of your screen.
  - If this happens, make sure you are using the right **User Name**.
    - SIU Carbondale employees should be using their **SIU85xxxxxxx**.
    - School of Medicine employees should be using their **entire email address**, unless classified as a School of Medicine Carbondale extra-help employee, Graduate Assistant or Student.

- If you think your **Password** is the issue, before you contact a system administrator or SalukiTech, try to Reset your Password according to the *Login Assistance* and *Reset Password* sections of this document.

Getting Started: Personalize Main Menu (LC #3)

Overview

Your **AIS E-Business Suite Main Menu** lists all of the Responsibilities assigned to you. The Main Menu also contains a **Personalize** button used to customize the listed Responsibilities. You can use this tool to hide specific Responsibilities from appearing on your Main Menu. If it becomes necessary, you can also show the Responsibilities again, later. Although the option is available, it is unlikely end users will find it necessary to use this function.

Search and Select Responsibilities

- Login to your AIS Home Page and click the **Personalize** button in the top left corner of your Main Menu.

- The **Customize Applications Navigator** window opens.

- The first step is to **Search** for Responsibilities.
    - You can limit the search by entering a Responsibility Name in the associated field.
    - You can also search using the **Display** field which defaults to "All Responsibilities"; this displays all Responsibilities assigned to you when you click on the **Go** button to the right of the field.
    - Or, you can click the **Show All** button in the row of buttons to the right of your screen. This displays all assigned Responsibilities.

Hide Responsibilities

- Once your assigned Responsibilities display; then, select the ones that you want to hide by clicking the associated checkbox in front of each.

- Next, click the **Hide** button located at the top of the Select Responsibilities section to exclude the selected Responsibilities from the Main Menu list.

- To complete the process, click **Apply**.

- You are returned to your Home Page and the hidden Responsibilities will no longer appear on your Main Menu.

Show Responsibilities

- To redisplay Responsibilities, follow these steps.
    - Click the **Personalize** button to open the Customize Applications Navigator window.
    - Click on the Display field down arrow; select **Hidden Responsibilities** and click **Go**.
    - The hidden responsibilities will display.

- You can select each Responsibility to reactivate it or if you have several Responsibilities hidden, you may click **Select All** to mark all Responsibilities to be shown.

- Click the **Show** button.

- Click **Apply.**

- The hidden Responsibility re-appears on your Main Menu.

Getting Started – Favorites (LC #4)

Overview

To create a Favorites list for your self-service personal home page, you can select frequently used functions & web addresses and add them to your Favorites list on your Home Page.

Search

By Function

- Click the **Favorites** link and then **Manage Favorites** option to navigate to the **Customize Favorites** page.

- You can use the **Function Prompt** and **Description** fields to search for the desired functions.
    - If these fields are used, the system searches for **all** matching Functions from **all** assigned Responsibilities.

- Enter a function in the Function Prompt field.

- Press **Tab** and enter a **Description** (optional); click the **Go** button.
    - All functions that match the search criteria appear in the **Select Functions** section.

By Responsibility (recommended)

- Another option you can use to display functions is to search using the Responsibility field on the Customize Favorites window. Conducting a search using a Responsibility only retrieves functions specific to that Responsibility. To do this:
    - Click the **Responsibility** field **Down Arrow** (only your assigned responsibilities will be listed);
    - Click on the desired Responsibility; and
    - Then, click the **Go** button.

Select Functions

- From the **Select Functions** section of the Customize Favorites page, select the function(s) to appear on the Favorites list.
    - You have options to Select All or Select None or select a single function.

- To select a single function, click the checkbox next to it; then, click the **Add** button.

- The function you selected appears in the **Selected to Display** region below.
    - If necessary, use the Favorites field to rename the Function making it specific to the Responsibility, e.g. the *Run* function.

- Click **Apply** to process and return to the homepage. Click the Favorites link to verify the function is listed.

Add URL

- Click the **Favorites** and then the **Manage Favorites** link to navigate to the Customize Favorites page.

- Click the **Add URL** button at the bottom of the page; a new row is inserted in the **Selected to Display** region.

- Enter the name for the URL in the **Favorite** field. Make the name unique; it will appear on your Favorites list.

- Press **Tab** on the keyboard to advance to the **URL** field; type or copy and paste the URL (web site address).
    - If necessary, click the checkbox to "Open in New Window".

- Click **Apply** to process and return to your personal homepage.

Modify Favorites

- Your Favorites will be listed in the same order as displayed in the **Favorite** column in the Selected to Display region of the Customized Favorites page.

- If the items are not listed in the order you prefer, you can rearrange these.

- From your homepage, click the **Favorites** and **Manage Favorites links** to open the Customized Favorites page.

- In the **Selected to Display** region, click the Move **UP** or **DOWN** arrow to change the order of the items in the list to the desired location.

- Once the list of Favorites is in the preferred order, click **Apply** to process.

Remove a Favorite

- You can also remove a Favorite, when it is no longer wanted.

- From your homepage, click the **Favorites** and **Manage Favorites** links to open the Customized Favorites page.

- In the **Selected to Display** region, click the corresponding checkbox for the Function or URL.

- Click the **Remove** button and click **Apply** to process the change.

- Your Favorites list on your homepage reflects the changes just made.

Getting Started - Web Navigating (LC #5)

Overview

Oracle Applications contains several self-service (web-based) applications. To navigate to functions in self-service applications, you will use:
- Tabs, sub-tabs, and side-bar navigation elements.
- Previous and Next links to navigate through records in a table.
- Back and Next buttons to navigate through steps of a task.

I**MPORTANT:** Use the forward and backward navigation elements provided by the self-service applications. Do not use your browser's back buttons.

Navigation Techniques

Some of the Oracle navigation techniques are defined below.

- **Process Train**: If you are executing a process, a process train shows the location of the current page in the process. These allow you to jump one or more steps backward in the process by selecting the step icon. Some process trains are inactive.

- **Locator Links:** Locator links (sometimes called "breadcrumbs") are a series of links and text that show your navigation path through an application. Use the links to return to a previous point in your navigation path.

- **Navigator & Favorites Menus:** While just the Favorites link appears on the Main Menu, the Navigator and Favorites links both appear on every HTML page. Use these to launch an Oracle form or application.

Navigating with Navigator Link – Down Arrow

Some of the tools used to navigate self-service applications will be familiar to you because you have applied them while utilizing the Internet and navigating other web pages. These navigation tools become available from an open web page and allow you to easily select another function and continue working, without returning to your Home Page Main Menu to do that.

Navigator Down Arrow Usage

- One of the navigation tools you will find on an open web page is the **Navigator** link **Down Arrow**. It is located to the right of the Navigator link in the header section of the web page.

- Click the Navigator Down Arrow to access your assigned Responsibilities from a picklist.
  – Selecting a Responsibility from this picklist expands the submenu to the right or left of the list, depending on the amount of space needed.
  – If there are **no** subfolders, then the functions are listed.

- If you were to click on a function for a form, the application is launched and the form is opened in the same manner as if you selected it from the Home Page Main Menu.
  – When you exit the form, you will return to the web-based application.

- When the Navigator Down Arrow is selected, a **Manage Navigator** link is also listed by default.
  – Click this link to Hide and Show Responsibilities, as the Personalize button did on the Main Menu.

- To close the list, click anywhere on the web page.

Note: When you switch Responsibilities using the Navigator Down Arrow and later return to the web page after exiting the application, an information/message icon appears on the web page reminding you of the switch. No action is required when this happens and when using some applications, it will not appear at all.

Favorites Navigation

In addition to the Navigator options, if you have created a Favorites list, you can also use those links as a way to navigate to forms and other web-based applications. It is the same Favorites picklist available from the Home Page.

- Click the **Favorites Down Arrow**.

- At the bottom of the Favorites picklist is the option, **Add to Favorites**. **DO NOT USE THIS LINK!!!**
  – "Add to Favorites" works much like a bookmark in a browser. It appears to be a quick way to add web-based applications to your Favorites list without having to go through the steps required when you use Manage Favorites. HOWEVER, this option does not have the correct navigation tools to exit an application. You will be forced to log out in order to exit the window or form.

- Click anywhere on the web page to close the Favorites picklist.

Additional Navigation Tools

Items such as tabs, sub-tabs, and side-bar navigation elements are used frequently on many web pages. Locater links, sometimes called breadcrumbs, are also used frequently to mark your navigation path.

- If you perform a query, such as searching for a supplier, numerous matches may be listed. You can view the listings by using the **Next (#)** and **Previous (#)** links located at the top and bottom of the displayed search results.

- When a Supplier is located, select it and click the **Update** link to view additional information.

- The Quick Update page opens and provides a **side-bar** to navigate through all the information for that supplier.
  – The side-bar contains links to access groups of related information.

- When more information is available than will fit in to one area of a web page, related information is grouped and can be accessed by clicking a Tab. The Tab label describes the information available.

Worklist (LC #6)

Overview

The **Worklist** region, located on the right side of your AIS Home Page, allows you to easily see, access and respond to any pending Notifications. The Notifications listed may have been sent by a person or generated by the system.

Notifications can be a useful tool, as you can use this tool to forward a copy of a report to the Fiscal Officer, etc. To find out how to forward reports, review the tutorial in Unit 2: Navigation, Module 6: Running Reports, Learning Cycle 7: Report Requests: Upon Completion Options.

Users in the Central Business Offices utilize Notifications **more often** than Department End-Users. However, for some Responsibilities, such as SIU Department Buyer, SIU PO Department Buyer or SIU Department Receiver, viewing, opening and acting upon Notifications is a very important function. For these responsibilities, the Notification function is listed as Notifications Summary for a specific Responsibility and instructions for handling notifications are provided in the respective training Unit.

Accessing Notifications

- Each user will have a Worklist region on their respective Home Page. The Worklist is web-based.

- There are two ways to access the Notifications in your Worklist.
    - If you want to view just one Notification at a time, click on the **Subject** link.
    - If you have a lot of Notifications and prefer to see all of them at once, use the **Full List** button, located in the upper right section of the Worklist area.

Using the Subject Link

- If you select the **Subject** link for a notification, the Notification Details web-based application opens.
    - You will use this window to act upon the Notification. Before you begin, be sure to read any Messages displayed under **Information**. The message tells you if the Notification requires a response.
    - If an action is required, buttons such as **OK**, **Reassign** and **Request Information** are available.

- When finished use one of the links located at the top of the web page to exit.

Using the Full List Button

- If you select the **Full List** button from your Home Page Worklist to open Notifications, a web-based application for Notifications opens, allowing you to view new Notifications, as well as those previously viewed.

- To filter the Notifications displayed, use the **View** field.
    - **Open Notifications** is the default option for this field.
    - Click the View Down Arrow, to view more viewing options: **All**, **FYI**, **Notifications from Me**, and **To Do**.
    - To use one of the picklist options, select it and then click the **Go** button to the right of the View field.
    - All notifications relative to the selected View will display in table format on the page.

- To view a displayed Notification:
    - Click the Subject line of the Notification, as before.
    - Or, click on the checkbox in front of the Notification to select it and then click one of buttons above the displayed Notifications: **Open**, **Reassign** or **Close**.

- To exit, the Worklist web page, click the Home link at the top of the page.

IMPORTANT: If you decide to launch a forms-based application without first opening your Notifications in your Worklist, a series of windows will open and then a **Note** appears reminding you that you have a number of open notifications. To Continue, click the **OK** button on the Note and the application will open, as normal.

End of Document