

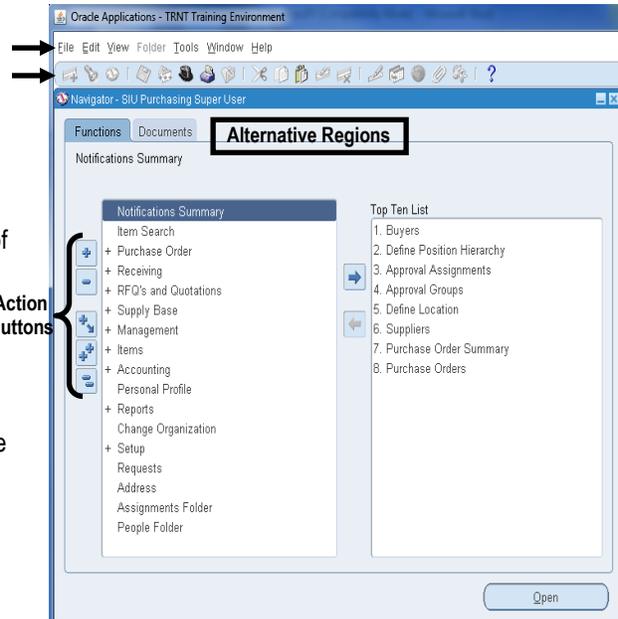
This document covers Learning Cycle 1: Navigator Window; Learning Cycle 2: Basic Window Functions; and Learning Cycle 3: Navigating Within a Window.

## Windows: Navigator Window

When you log in from your personal AIS Home Page, you go directly to the selected form and do not see the Application Navigator window below. However, when you close all forms, you return to the Application Navigator window. In this document, the elements specific to the Application Navigator are introduced.

### Navigator Window Overview

- A Toolbar and Menu bar appear above the Application Navigator window.
- The Application Navigator Window allows you to access forms, documents, and in some instances workflows, through the use of **Alternative Regions**.
  - An Alternative Region is one of a collection of regions that occupy the same space in a window; only one region can be displayed at a time.
  - These regions are arranged in an index Tab format, aka: Tabbed Regions.
- The Application Navigator contains two Alternative Regions, **Functions** and **Documents**.
  - Some responsibilities have a third tab called **Processes**. This allows you to view and/or start workflow processes.



### Alternative Regions

#### Functions Region

- The default Alternative Region is **Functions**.
- A list of **Functions** for the selected Responsibility is located on the left side of this region.
  - A plus (+) in front of a Function represents sub-functions or nested items.
- To the left of the list of Functions is a group of **Action Buttons**.
  - The plus and minus combination buttons are used to expand and collapse items in the Function List.
- The area on the right side of the Navigator window, labeled **Top Ten List**, is used to create a list of most frequently used forms.
- The **Right** and **Left Arrow** buttons located in the center of the window are used to add and remove items from the Top Ten List.

#### Documents Region

- To select the **Documents** Region, click the corresponding tab.
  - This region is used to display links to documents that you are working on, for faster access (e.g. a Purchase Order). **Note:** The tools in this region are disabled until documents are placed here.
- When documents exist, you can choose the way your Documents are displayed, either in **Icon** view or **List** view.
  - The **Icon** view is the default option. Documents in progress are represented by images rather than text.
  - The documents in **List View** are identified by text links; click the **List** view radio button to display text links.
- When necessary, you can **Rename** or **Remove** a selected document by choosing the corresponding button.

### How Will I Use the Application Navigator?

#### Close Other Forms

- It is recommended that you set the **Close Other Forms** option.
  - This will ensure the forms associated with one function are closed prior to another function being selected.
  - When some financial functions are performed, this option should be turned off. Instructions are provided when applicable.
- To set this option, click the **Tools** menu and then click on the **Close Other Forms Checkbox**.

#### Select Function/Form

- A plus (+) in front of an item in the Function List indicates sub-functions exist.
- To expand the Function List, highlight the Function and then click the desired Action Button on the left.
  - You can also use double-clicking to Expand or Collapse items in the Function List.
- To navigate to the form from the Application Navigator, highlight the Function and then click the **Open** button.
  - If preferred, highlight the Function and then double-click it to navigate.
  - A Function **MUST** be expanded to its lowest level in order to open the corresponding form.

#### Close Form

- Listed below are the various methods you can use to close a form and return to the Application Navigator window.
  - Using the **Oracle** icon in the upper left corner of a window, click the Icon and select **Close** from the drop-down menu. Keyboard shortcut is **Ctrl + F4**.
  - From the Menu Bar, click the **File** menu and select **Close Form**.
  - From the Toolbar, click the **Close Form icon** . Just one mouse click closes the form and all of its associated windows.

#### Switch Responsibilities

- You can Switch Responsibilities from the Application Navigator window; two methods are available.
  - From the Toolbar, click the **Top Hat** icon.
  - From the Menu Bar, click the **File** menu.

#### Create a Top Ten List

- Creating a Top Ten List eliminates the need to drill down to a Function each time it is needed.
- To **Add** a Function to the Top Ten List from the Application Navigator:
  - Highlight the Function and then click the **Right** arrow, located in the center of the window.  
**Note:** The Function description may change slightly when it appears on the Top Ten List, but the functionality is still the same.
- To navigate to a Form from the Top Ten List, perform one of the following:
  - Double-click on the form name.
  - Highlight the form and then click the **Open** button at the bottom of the window.
  - Use your keyboard to type the number of the form (e.g. 1 for Purchase Orders).
- Functions will remain in the Top Ten List until you manually remove them.
  - To **Remove** a Function, highlight it and click the **Left** arrow, located in the center of the window.

## Windows: Basic Window Features

This portion of the document highlights basic window features common to Oracle Applications software.

### Menu and Toolbar

- The Menu Bar and Toolbar in Oracle Applications is similar to that of many Windows-based applications.
- The **Menu Bar** appears at the top of the window.
  - Some menus on the Menu Bar may be disabled (grayed out); or, the menu may be active but contain functions that are disabled.
    - Some functions are specific to certain responsibilities.
    - Availability can also depend upon your level of access in AIS.
- The **Toolbar** is located directly under the Menu Bar.
  - Icons on the Toolbar represent frequently used menu functions.
  - When you mouse-over an icon, “bubble help” is available.
- **Window Title Bar** is located under the Toolbar and contains the form name and other navigation tools.
  - In the left corner is a red Oracle icon; it can be used to close the window.
  - In the right corner are the Window Control Buttons used to minimize, maximize, and close the window.

### Fields, Buttons, et. al.

- A **Field** is a position on a window that allows you to enter, view, update, or delete information.
- **Checkboxes** and **Buttons** allow you to perform a predefined action or set some value when clicked.
  - Some button labels offer keyboard shortcuts, e.g., Find (J). Press Alt + letter key to use a shortcut.
- **Alternative Regions**, commonly referred to as Tabbed Regions, are used to group fields of related information.
  - Clicking on a Tab displays a logically related set of fields. The remaining regions or sections of the window do not change.
  - The active Tab is indicated by a darker background color.
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### Field Characteristics

- Oracle fields have specific characteristics, which help the user identify specific system requirements or responses.
- **List of Values (LOV)** - Fields with three dots located on the right. , indicate a **List of Values** is available. An option from the LOV can be used to populate the field.
- **Cut, Copy and Paste** – When a field with information is highlighted, you can right-click your mouse to use the cut, copy and paste functions; when enabled, folder functions, as well as access window help are also available.
- A field containing a **Yellow** background indicates data entry is required for that field.
- A field containing a **Blue** background indicates the system is in Query mode. In a multi-record layout, the selected field or record row also contains a blue background.

### Message and Status Lines

- The Message and Status Lines appear across the bottom of the application window.
  - If not visible, click the Maximize window control button to make the Message and Status lines visible.
- **Message Line** – appears first in the section. It displays messages such as the saved status of a form, steps in a query process, errors and solutions, etc.
- **Status Line** – located below the Message Line, it identifies specific information relative to the selected Record, as well as numeric placement of the record within a record block, etc.

### Windows: Navigating within a Window

This portion of the document demonstrates various ways to navigate within a window. The following will be covered: Navigating from **Region-to-Region**; navigating from **Field-to-Field**; navigating from **Record-to-Record**.

#### Region-to-Region

- **Alternative Regions** are displayed in an index tab format.
- The darker colored tab represents the active region.
- The fields displayed are logically grouped to correspond with the tab.
- To change regions, click the tab that represents the information you want to see.

#### Field-to-Field

- To move forward to the next field in a window, press the **Tab** key on your keyboard or use your mouse and click in the field.
- To move backward to the previous field in a window, Press **Shift + Tab** on your keyboard, or use your mouse and click in the field.
- Refrain from using the **Enter** key on your keyboard to advance the cursor; this may cause an unwanted action.
- When you click in or tab to a field, any data in that field will be highlighted.

#### Record-to-Record

- The **Current Record Indicator** is the blue rectangular shaped box to the left of the first field in a record.
  - When highlighted, it identifies the active record.
- If you click the Current Record Indicator, you may activate the default button on the window.
  - The default button has a darker border than the other buttons.
- You can use your keyboard to move through the records.
  - Press the **Down Arrow** to move to the next record.
  - Press the **Up Arrow** to move to the previous record.
- The Up and Down Arrow keys operate the same way in a single record window. There, the whole screen will change to display the new record. The records are stacked on top of one another like sheets of paper in a pile.
- You can use your mouse to place the cursor in a field in the record.
- The **View** menu has the options to navigate to the **Last Record** and **First Record**.
  - Click View/ **Record/ Last** or **First**, respectively.
  - To determine the total number of records in the block, click **View/ Record/ Last**, and view the Status Line at the **bottom** of the window.
- When a Record Block has 100+ records, the system retrieves the first 100 records and prompts you with a Decision window to “stop” or “continue” retrieving the records.
  - Clicking the Continue button retrieves the next hundred or less records.
  - Clicking Continue to End retrieves all records, without redisplaying the Decision window again.
- The Vertical and Horizontal Scroll bars can also be used to view all the fields in a record.