

Menus & Toolbars: Menus

The Menu Bar is located at the top of Oracle forms and windows. To access a function, click on the Menu, then the respective function. Available Menus are brightened or enabled. You may find a Menu or Menu Function to be disabled on some windows. Availability depends upon the application and the responsibilities assigned to you in AIS.

File Menu

- The **File** menu allows you to invoke specific commands.



- New** – clears field contents of active form, displays a blank window.
- Open** – option to open another window.
- Save** – saves pending changes in the current form.
- Save and Proceed** - Saves pending changes and readies the form for entry of a new record.
- Next Step** – same as Process Step Completed – updates the Process Workflow in the navigator (?) by advancing to the next step in the process.
- Export** – Invokes the Oracle Export utility.
- Place on Navigator** – places the current document on the Navigator Document list.
- Log on as a Different User..** – **not enabled**. You **MUST** Logout and return to the Login page to sign-on as a different user.
- Switch Responsibility** – allows you to switch responsibilities.
- Print...** – prints current window.
- Close Form** – closes all windows of the current form.
- Exit Oracle Applications** – quits Oracle Applications.

Edit Menu

- The **Edit** Menu allows you to change data in the database or remove displayed data from the window.



- Undo Typing** – clears the contents of data entry fields—this feature does not work on fields populated with a List of Values.
- Cut or Copy** – this function allows you to select data in a field by either dragging the mouse over or double-clicking on the data; from the **Edit** menu, select Cut or Copy. When the Tab key is used to advance to a text field, the data is automatically selected for cutting or copying.
- Paste** – click in the designated field; from the **Edit** menu, select Paste.
- Duplicate>**
 - Record Above** – copies the entire record immediately above into the current record.
 - Field Above** – copies data from the field above into the current field.
- Clear>**
 - Record** – clears displayed data from all fields for the current record; *does not* delete the record from the database.
 - Field** – clears displayed data from the current field; *does not* delete data from the database.
 - Block** – Erases all displayed data from the current block. This *does not* delete the data from the database.
 - Form** – Erases all displayed data from all blocks and all windows in the current form; erases any pending changes. *Does not* delete data from the database.
- Delete Record** – Marks the current record for deletion from the database; the record is actually deleted when you save your work.

(Edit Menu – Continued)



Select All – Highlights all records in the block and marks them for action.
Deselect All – Un-highlights all selected records except the current record, releasing them for possible action.
Edit Field... Opens up the Editor window for the current field.
Preferences> displays a poplist with two options: **C**hange Password... or **P**rofiles.

View Menu



Show Navigator – the Navigator window is open in the background; clicking this function maximizes it; it becomes the active window.
Zoom –inactive at SIU.
Find... – Invokes a search function called Query Find. Selecting this function will cause one of two types of windows to be displayed -- a Find window into which you would enter search criteria or a List window containing all the possible records you can retrieve.
Find All – Automatically invokes a search for all possible records.
Query by Example> displays a poplist of Query options:

- **Enter** - Places a data entry window into Enter Query mode so that the Query-by-Example search function can be used.
- **Run** - Runs the Query-by-Example after search criteria has been entered.
- **Cancel** - Cancels Enter Query mode.
- **Show Last Criteria** - Displays the last search criteria entered.
- **Count Matching Records** - Allows you to enter search criteria and determine the number of records that will be retrieved without actually displaying the retrieved records.

Record> displays a poplist with two options for selecting a record:

- **First** - In a multi-row block causes the cursor to move to the first record; in a single-row block, causes the first record to be displayed.
- **Last** - In a multi-row block causes the cursor to move to the last record; in a single-row block causes the last record to be displayed.

Translations – Displays the Translations window. This window is used to translate values to another language. *Not enabled at SIU.*
Attachments... – Clicking this options displays the attachments window, used to view or delete exiting attachments or create new ones. Attachments are non-structured data such as word processing documents or spreadsheets linked to more structured application data.
Summary/Detail – Toggles back and forth between a summary display and a detail display.
Requests – allows you to view submitted reports.

Folder Menu

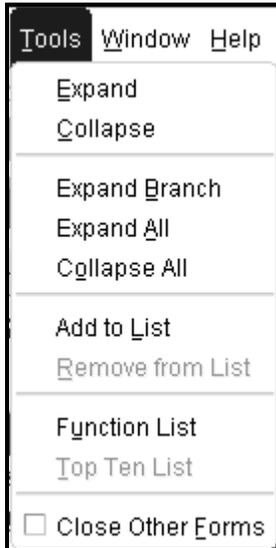
- Click **F**older on the Menu Bar to view the commands detailed below.
- The Folder Menu allows you to customize a folder block by changing the size and arrangement of the fields.



- The **F**older menu contains:
 - **New...** – creates a new folder.
 - **Open...** – opens an existing folder.
 - **Save** – saves changes to the current folder.
 - **Save As...** – saves current folder and prompts you for a new name.
 - **Delete...** – deletes an existing folder.
 - **Show Field...** – shows fields not currently displayed.
 - **Hide Field** – hides the currently displayed field.
 - **Move Right** – in a multi-record block, switches the current field with the field to its right; (in a single-record block, moves the field one character width to the right).
 - **Move Left** – in a multi-record block, switches the current field with the field to its left; (in a single-record block, moves the field one character width to the left).
 - **Move Up** – for a single-record block, moves the current field up one character height.
 - **Move Down** – for a single-record block, moves the current field down one character height.
 - **Widen Field** – increases the width of the current field.
 - **Shrink Field** – decreases the width of the current field.
 - **Change Prompt...** – renames a column heading.
 - **Autosize All** – resizes all displayed fields based on a sample of values in the field; ensures that the field is, at least, as wide as its column heading.
 - **Show Order By** – alters the sorting order of records in a multi-record block.
 - **View Query...** – opens a window that displays the SQL WHERE clause used to define the search criteria.
 - **Reset Query** – clears the WHERE clause from the window.
 - **Folder Tools** – displays the Folder Tools Toolbar.

Tools Menu

- Clicking **Tools** on the Menu bar will display a list of commands which allows you to perform additional functions, specific to the current window. The choices on this menu will vary depending on the current window. Below is a list of functions available on Tools menu for the Navigator window.



Expand – Expands the current function; is the same as clicking .

Collapse – Collapses the current function; is the same as clicking .

Expand Branch – Expands the current Navigator function's branch; is the same as clicking .

Expand All – Expands all branches of all Navigator functions; is the same as clicking .

Collapse All – Collapses all branches of all Navigator functions; is the same as clicking .

Add to List – adds a selected function to the Top Ten List.

Remove from List – removes a selected function from the Top Ten List.

Function List – places cursor in function List.

Top Ten List – places cursor in the Top Ten List.

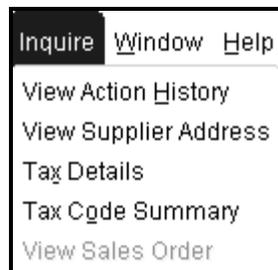
Close Other Forms – You must manually check this feature, during the initial access of an application.

Remember:

- The **Tools** menu options change also according to the window and application.
- Switch Responsibility is accessible from the **File** menu.
- Change Password is performed through the **Edit** menu → Preferences.

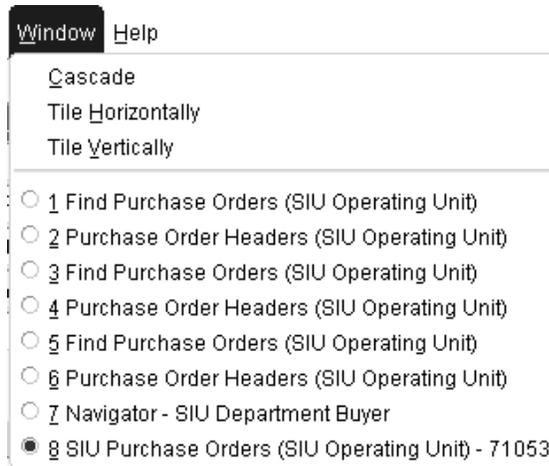
Inquire Menu

- The **Inquire** menu is only available in a few applications. The one shown below is from the Purchasing application.
- Clicking **Inquire** on the Menu bar will display a list of commands which allow you to perform additional functions, specific to the current window.
- The choices on this menu will vary depending on the current window.



Window Menu

- Clicking **Window** on the Menu Bar displays a list of options which will allow you to customize the arrangement of the open windows on your computer screen.
- This menu also lists the titles of all open windows.
 - An enabled radio button indicates the *active* window.
- The menu below is from the SIU Purchase Orders (SIU Operating Unit) window.
 - The titles listed, representing the open windows, will depend upon the application and windows currently open.



Help Menu

- Clicking **Help** on the Menu Bar allows you to access the Oracle help system.



- The commands on the Help Menu are:
 - **Window Help*** – Provides information about the current or active window.
 - **Oracle Applications Library*** – Allows you to view Oracle reference documentation for any of the application products.
 - **Keyboard Help...*** – Displays a list of keyboard shortcuts.
 - **Diagnostics** – Displays a poplist of features primarily for technical use; formerly the “Tools” function.
 - **Record History** – Clicking this option displays a dialogue window called “About This Record”. It provides information about the current record, such as who entered it, when it was modified, etc.
 - **About Oracle Applications...** – Displays the version of software for the current application. Helpful when calling IT for support.

*Additional information is provided on the following pages for these commands.

Window Help

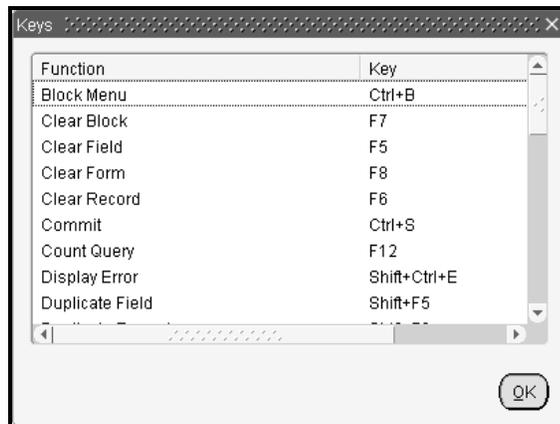
- From the **Help** menu, select **Window Help**.
- Window Help provides information about current or active windows (e.g. field definitions).
- Clicking on the **File** menu and selecting **Close** will shut this window.

Oracle Applications Library

- From the **Help** menu, clicking **Oracle Applications Library** allows you to view Oracle reference documentation.
- When the **Oracle Applications Library** window opens, the **Oracle Information Navigator** window may display, simultaneously.
 - You can choose to **close** or minimize the Oracle Information Navigator window, while referencing the Oracle Applications Library.
 - Or, you can perform a search using the Oracle Information Navigator.
- From the Oracle Applications Library, you need to click on the link for the topic you wish to review.
- When viewing is complete, exit the Oracle Applications Library by clicking the **File** menu and selecting **Close**.

Keyboard Help...

- From the **Help** menu, selecting **Keyboard Help...** displays a list of shortcut **Keys** that can be used to invoke common Oracle functions.
- You can use the Vertical Scroll Bar to view the entire list.
- Clicking  closes the Keys window.



Note: Not all shortcut keys are active for every window.

- The **Keyboard Help...** option gives access to keyboard shortcut keys shown in the table below.

FUNCTION	KEYSTROKES	FUNCTION	KEYSTROKES
Block Menu	CTRL - B	List of Values	CTRL - L
Clear Block	F7	Next Block	SHIFT - PAGE DOWN
Clear Field	F5	Next Field	TAB
Clear Form	F8	Next Primary Key	SHIFT - F7
Clear Record	F6	Next Record	↓
Commit	CTRL - S	Next Set of Records	SHIFT - F8
Count Query	F12	Previous Block	SHIFT - PAGE UP
Delete Record	CTRL - ↑	Previous Field	SHIFT - TAB
Display Error	SHIFT - CTRL - E	Previous Record	↑
Down	↓	Print	CTRL - P
Duplicate Field	SHIFT - F5	Return	RETURN or ENTER
Duplicate Record	SHIFT - F6	Scroll Down	PAGE DOWN
Edit	CTRL - E	Scroll Up	PAGE UP
Enter Query	F11	Show Keys	CTRL - K
Execute Query	CTRL - F11	UP	↑
Exit	F4	Update Record	CTRL - U
Insert Record	CTRL - ↓		

Record History

- From the **Help** menu, select **Record History**.
 - This menu option is active when you are in an application with an open window, such as the "SIU Purchase Orders" window, in which records are displayed in a multi-record block.
- The **About This Record** window displays information relative to the active record, such as the date created and modified, by whom, etc.
- Clicking  closes this window.



About Oracle Applications

- From the **Help** menu, selecting **About Oracle Applications...** displays the **About Oracle Applications** window.
- This window provides logon and database server information and other information relative to the application you are working in.
- Clicking  closes the About Oracle Applications window.



Menus & Toolbars: Toolbars

Overview

The Toolbar icons may vary by window, but the most common ones are found on all windows.

The Toolbar has "bubble help" or alternative text when you mouseover the icon. It is stationary and can always be found at the top of the window.



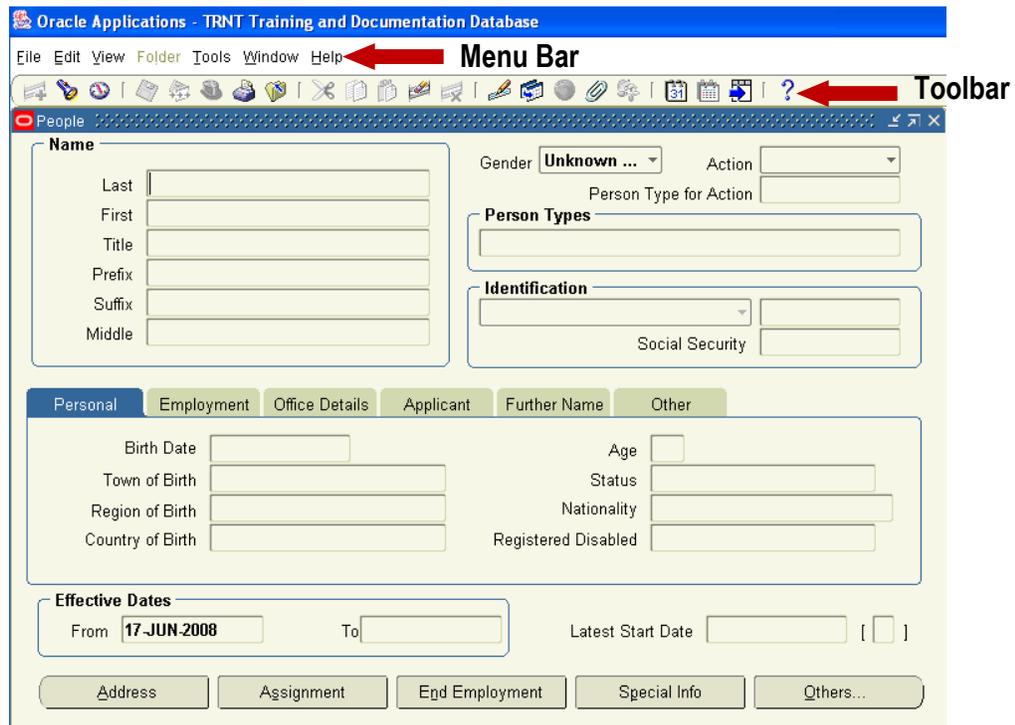
- The **green +** is the **New**  icon, it allows you to add a new record.
- The flashlight or **Find**  icon is used to put the system in Query mode.
- Show Navigator**  brings up the Navigator for the current responsibility.
- Clicking the **Save**  icon saves the actions performed.
- The **Next Step**  icon is used to update the Process Workflow on the Navigator by advancing to the next step in the process.
- The icon that looks like a top hat  allows you to **Switch Responsibilities**.
- The **Print**  icon allows you to print the active window.

- The **Close Form**  icon allows you to close the entire form with one click.
- The **Cut, Copy and Paste** icons    function in Oracle, as they do in other software applications.
- The **Clear Record**  icon allows you to clear the information in the record.
- The icon with the **red X**  allows you to **Delete** the current record.
- Activating the **Edit Field...**  icon opens a window displaying the contents of the current field. It is also helpful when typing a large amount of text in to a field.
- The **Zoom**  and **Translations**  functions are not used at SIU.
- The paperclip  indicates an **Attachment**. If the paperclip is enabled or brightened, an attachment may be added to the document. If there is a piece of paper in the paperclip, the document already has an attachment.
- The **Folder Tools**  icon looks different, but functions the same as in previous version. If the icon is enabled, the block of records may be customized.
- The question mark  indicates **Window Help**. Clicking this icon accesses the Oracle Applications library.

Menus & Toolbars: Additional Information HRMS

Overview

- There are slight differences between the HRMS Menu Bar and Toolbar and the financial applications Menu Bar and Toolbar.
 - Differences include:
 - No Inquire menu
 - Functionality available on the Tools menu
 - Icons available on the Toolbar
- This document will point out the differences, based on the information presented in previous documentation.
- The **People** window, shown below, is available from most HRMS responsibilities. It contains a **Menu** bar and **Toolbar** that are typical of most HRMS windows.



Menu Bars

- Below is the Menu Bar from the Purchase Order Summary window, representative of the **FINANCIAL** applications.

File Edit View Folder Tools Inquire Window Help

- In comparison, the Menu Bar below is from the People window, representative of the **HRMS** application.

File Edit View Folder Tools Window Help

- The difference between the two menus above is the absence of the **Inquire** menu for the HRMS application window. The Inquire menu, located between the Tools and Window menus for the Financial applications window, is not available on the HRMS Menu Bar.

Tools Menu

- With the exception of the **Tools** menu, all of the menus contain the same functions.
- However, the HRMS Tools menu contains functions that are specific to HRMS windows.



- There are three functions available from the Tools menu.
 - **Alter Effective Date.** . . . When you log on to the system, the Effective Date is always today's date. To view past information or to make future-dated changes, this option is used.
 - **DateTrack History** . . . This option is used to view all changes to a record over time.
 - **Export Data** – This option, although enabled, is not currently used at SIU.

Toolbars

Financials Toolbar



HRMS Toolbar

Tools Menu Icons



- The majority of the Toolbar icons on the HRMS Toolbar should look familiar; but, a few will not. The unfamiliar icons represent the **Tools** menu functions we just reviewed.
 - - The day calendar icon is used to invoke the **Alter Effective Date** function.
 - - The month calendar icon is used to invoke the **DateTrack History** function.
 - - The blue arrow and form icon represents the **Export Data** function, not currently used by SIU.
- You can use either the Tools menu or the Toolbar icons to invoke these functions.
- You'll learn more about these functions during your hands-on training.