Navigation

Chapter 2
Section Objectives

At the end of this section, you should be able to:

- Log on to the PRISM system
- Choose a responsibility
- Use the Oracle Applications *Home Page & Navigator* window
- Navigate within the Oracle Applications windows
- Use the Oracle Application toolbar, menu items and shortcut keys
- Switch responsibilities
- Exit Oracle Applications
Installing the SUN Java Plug-in

Install the SUN Java Plug-in

- You must have the SUN Java Plug-in installed on your computer before you can use PRISM.
- This procedure needs to be done only once, and that is the first time you log on to PRISM.
- Unless you have full administrative rights to your computer, you must have someone from your tech support group install the Plug-in.

Follow the steps listed below to get directions for installing the Plug-in.

1. Double-click on the Internet Explorer icon

2. Enter the following URL:
   http://www.bc.pitt.edu
Installing the SUN Java Plug-in

3. Click on the PRISM link found at the bottom of the Resource Links column

4. Click on the SUN Java Plug-in Installation Instructions link in the User Access section to get the instructions for installing the Plug-in

5. Click on the Create PRISM 11i icon to place an icon on your desktop for easy access to the PRISM log on screen
Logging On To The PRISM System

Log On to the PRISM System

<table>
<thead>
<tr>
<th>University Portal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sign On</td>
</tr>
<tr>
<td>Enter User Name</td>
</tr>
<tr>
<td>Enter Password</td>
</tr>
<tr>
<td>B → Log In</td>
</tr>
<tr>
<td>PRISM Community</td>
</tr>
</tbody>
</table>

1. Navigate to the University Portal (https://my.pitt.edu)

2. Enter Username and Password
   - If you have forgotten your password, click the *Forgot your password?* link to go to the University Self Service Password Reset option or contact the Technology Help Desk at 412-624-HELP (4357).
   - In order to use the self service password reset, users must setup the designated security questions at http://accounts.pitt.edu/

3. Click the Log In button
Logging On To The PRISM System

4. Select My Communities drop down menu
   - Choose the PRISM community.

5. Click the Login button in the PRISM Login portlet.
   - This page can be bookmarked by clicking the Bookmark link at the bottom of the PRISM community.
   - Always review the Announcements portlet for information on the PRISM system.
6. The PRISM Home Page displays

7. The Worklist area will be empty the first time you log in to PRISM. Once you create documents in the Purchasing application and they are approved (or rejected), they will display in the Worklist. Working with documents in the Worklist is covered in detail in Chapter 9.

8. Your PRISM responsibilities are listed in the left-hand column under Navigator.
9. When you click on a responsibility the forms associated with that responsibility will display.

10. To open a form click on the form name.

The Navigation List

The navigation list is organized much like the hierarchy of a file system.

- You can expand items that begin with a plus sign (+) to further sublevels until you find the desired item.

- Sublevels appear indented below the items from which they are expanded.

- Items that are expanded are preceded by a minus sign (-). You can expand no further when an item displays neither a plus nor minus sign.

Expanding the Navigation List

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

- Select the item, then click on the Expand button shown here

Collapsing the Navigation List

To collapse an expanded item:

- Select the item, then click on the Collapse button shown here
Using the Applications Toolbar

The Applications Toolbar

The toolbar:

- Is a collection of iconic buttons found in the Requisitions screen
- Is a list of shortcuts that replicate many commonly used menu items so you can invoke their actions quickly without having to search for them in the menu bar.
- Is found at the top of your screen.

Each toolbar button performs a specific action.
The chart listed on the next page provides the following information for each button on the toolbar:

- Icon / Button
- Action
- Meaning
- Corresponding Menu Path, enclosed in parentheses either beside or below the meaning
### Using the Applications Toolbar

<table>
<thead>
<tr>
<th>Icon</th>
<th>Action</th>
</tr>
</thead>
</table>
| ![New](image) | Creates a new record  
( File → New ) |
| ![Find](image) | Opens the Find window to retrieve records  
( View → Find ) |
| ![Show Navigator](image) | Returns to the Navigator window  
( View → Show Navigator ) |
| ![Save](image) | Saves any pending changes in the active form  
( File → Save ) |
| ![Next Step](image) | This feature is not enabled in this application |
| ![Switch Responsibility](image) | Switches User Responsibility  
( File → Switch Responsibility ) |
| ![Print Screen](image) | Prints a copy of the active window  
( File → Print ) |
| ![Close Form](image) | Closes all windows of the active form  
( File → Close Form ) |
| ![Cut](image) | Removes the currently selected text and places it on the clipboard  
( Edit → Cut ) |
| ![Copy](image) | Copies the currently selected text to the clipboard  
( Edit → Copy ) |
| ![Paste](image) | Places text from the clipboard into a specified field  
( Edit → Paste ) |
| ![Clear Record](image) | Erases the current record from the active window  
( Edit → Clear Record ) |
| ![Delete Record](image) | Deletes the current record from the database  
( Edit → Delete ) |
| ![Edit Field](image) | Opens the Editor window for the current field  
( Edit → Edit Field ) |
| ![Zoom](image) | This feature is not enabled in this application |
### Using the Applications Toolbar

<table>
<thead>
<tr>
<th>Icon</th>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Translations" /></td>
<td>Translations</td>
<td><em>This feature is not enabled in this application</em></td>
</tr>
</tbody>
</table>
| ![Attachments](image) | Attachments | Opens the Attachments window  
(View → Attachments) |
| ![Folder Tools](image) | Folder Tools | Allows you to customize the presentation of data  
(Folder → Folder Tools) |
| ![Window Help](image) | Window Help | Displays Oracle help for the active window  
(Help → Window Help) |
Using Keyboard Shortcuts

Keyboard Shortcuts

- Everything that can be done with the mouse can also be done with the keyboard.

- The keyboard shortcuts are shown in the following table:

<table>
<thead>
<tr>
<th>Key</th>
<th>Description</th>
<th>Key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>F4</td>
<td>Close Active Window</td>
<td>Ctrl S</td>
<td>Save</td>
</tr>
<tr>
<td>F5</td>
<td>Clear Field</td>
<td>Ctrl Down</td>
<td>Insert Record</td>
</tr>
<tr>
<td>F6</td>
<td>Clear Record</td>
<td>Ctrl Up</td>
<td>Delete Record</td>
</tr>
<tr>
<td>F8</td>
<td>Clear Form</td>
<td>Tab</td>
<td>Go to next field</td>
</tr>
<tr>
<td>F11</td>
<td>Enter Query</td>
<td>Shift Tab</td>
<td>Go to previous field</td>
</tr>
<tr>
<td>Ctrl/F11</td>
<td>Execute Query</td>
<td>Shift PageUp</td>
<td>Previous Block</td>
</tr>
<tr>
<td>F4</td>
<td>Cancel Query</td>
<td>Shift F5</td>
<td>Duplicate Field Above</td>
</tr>
<tr>
<td>Ctrl E</td>
<td>Field Edit</td>
<td>Shift F6</td>
<td>Duplicate Record Above</td>
</tr>
<tr>
<td>Ctrl K</td>
<td>List of Keys</td>
<td>Shift Home</td>
<td>Highlight Field</td>
</tr>
<tr>
<td>Ctrl L</td>
<td>List of Values (LOV)</td>
<td>Shift End</td>
<td>Highlight Field</td>
</tr>
</tbody>
</table>
Window Navigation

Navigating within a Window

You can navigate within a window using one of the following methods:

- Move the cursor with your mouse.
- Choose an appropriate menu item.
- Enter an appropriate keyboard shortcut. For example, pressing Tab or Enter.

Difference between Tab and Enter

- Tab moves you between fields.
- Enter accepts the default entry in the field or window, providing there is a default available.
- If you use Enter to navigate between fields you may get unexpected errors. Use Tab or your mouse as much as possible.

Closing a Window

- In some forms, the initial window contains buttons that cause additional windows to be displayed. There are several ways to close windows within the applications.

  1. Select File from the menu bar, then select Close Form
  2. Click on the Close Window button that appears at the upper right hand corner of each active window
  3. Use the Keyboard Shortcut - - - - > F4
  4. Use the Close Form icon
Switching Responsibilities

Switching Responsibilities

If you have several responsibilities and you want to work in Oracle Applications under a different responsibility, you can do so without exiting Oracle Applications.

To switch your responsibility:

- Select *File → Switch Responsibility* from the menu bar or click on the icon from the toolbar

- Select a new responsibility from the *Responsibilities* window and click on the *OK* button or double click on the desired responsibility

- The *Navigator* window title and contents will reflect the new responsibility you have chosen.

If windows are open in your current responsibility:

- Oracle Applications will prompt you to save your changes before it closes those windows

- You can cancel switching responsibilities by clicking *Cancel* in the *Save Changes* window

The *Save Changes* window appears only if there are any changes to save. If there are no changes to save:

- All open windows other than the *Navigator* window will close

- Your responsibility list will be displayed
Exiting Oracle Applications

Exiting Oracle Applications

Oracle Applications
M → File → Exit Oracle Applications
Decision

1. Choose File → Exit Oracle Applications

2. When exiting, if changes were made and not saved, a Decision box is displayed giving you the following choices:

   ▪ **Save**  Save the changes before exiting
   ▪ **Cancel** Close this window and cancel the exit
   ▪ **Discard** Exit without saving any changes

3. If there are no changes to save in your window or windows, a Caution pop-up box appears

4. Click on the OK button if you are certain you want to exit, otherwise click on the Cancel button

5. Close all remaining windows until you return to the desktop