



Oracle R12 Login and Navigation Guide

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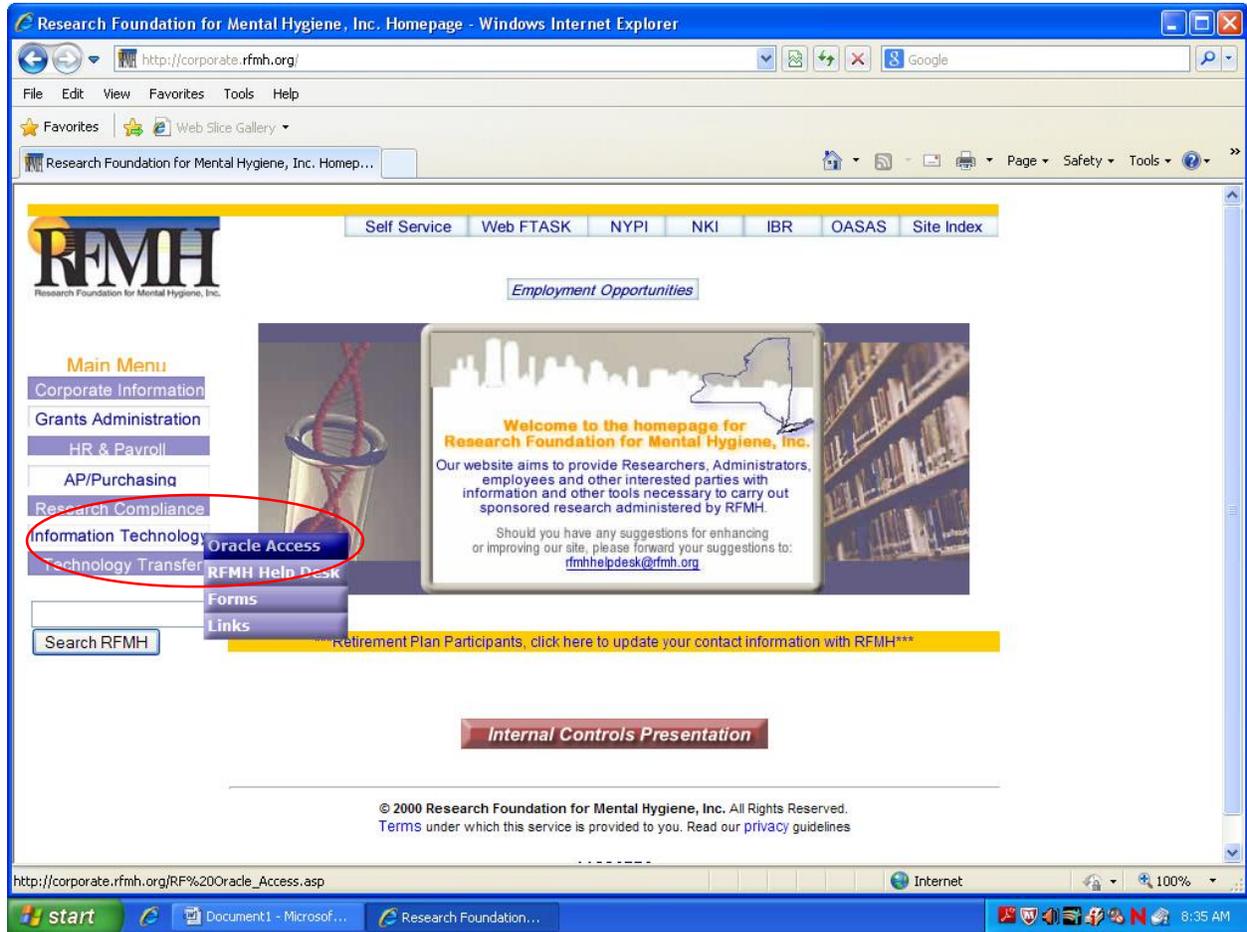
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This document outlines the basic login and navigation procedures for the RFMH R12 instances. The step by step instructions can be used for the upgraded PRODMH, TESTMH or DEVMH, however TESTMH is the instance used in the examples shown in this documentation. At the time this was written, the upgraded PRODMH was not available yet.

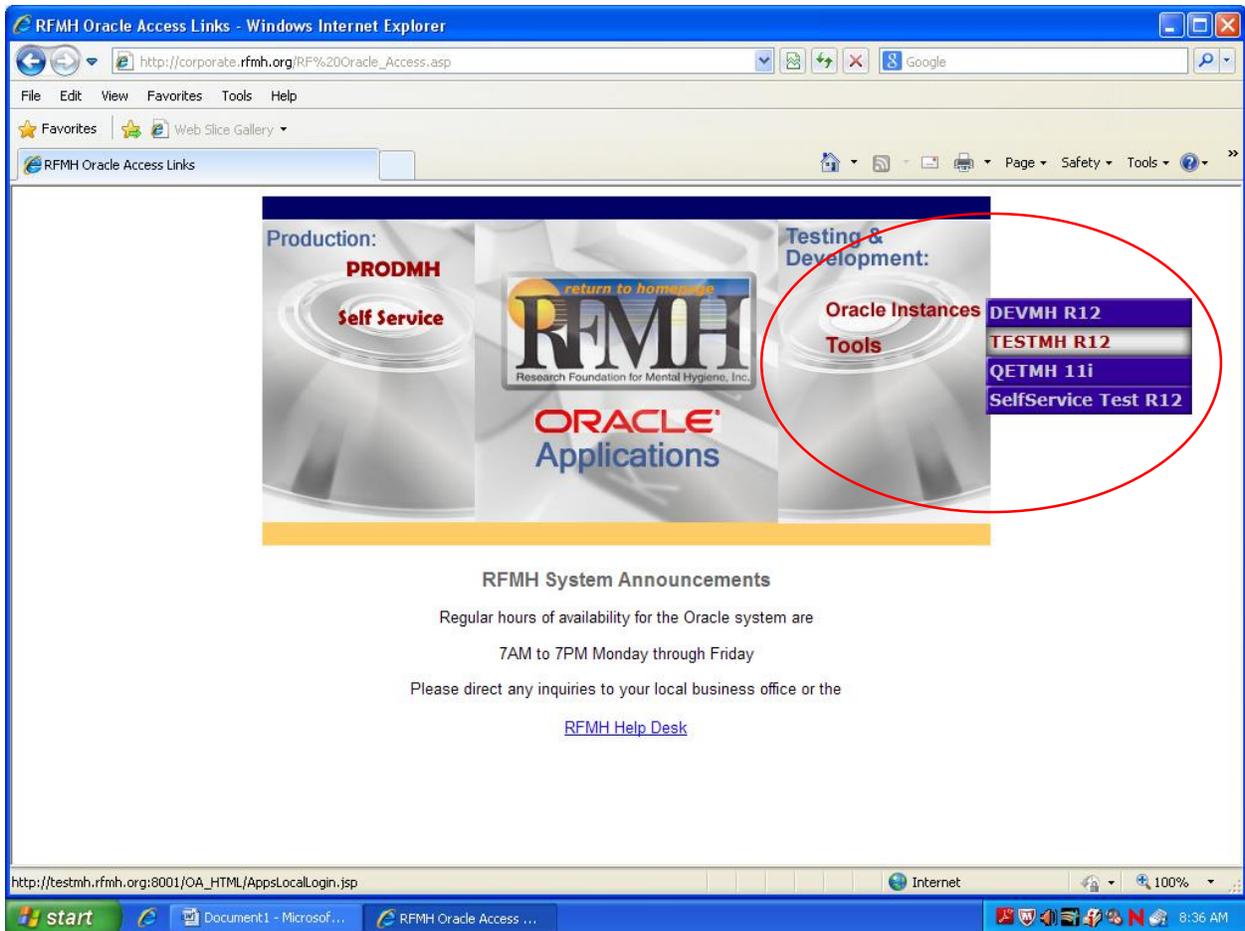
When logging in to the new production instance on or after June 18, 2014, use the same PRODMH link that you used previously in 11i.

Login

Start at the corporate webpage: <http://corporate.rfmh.org/>

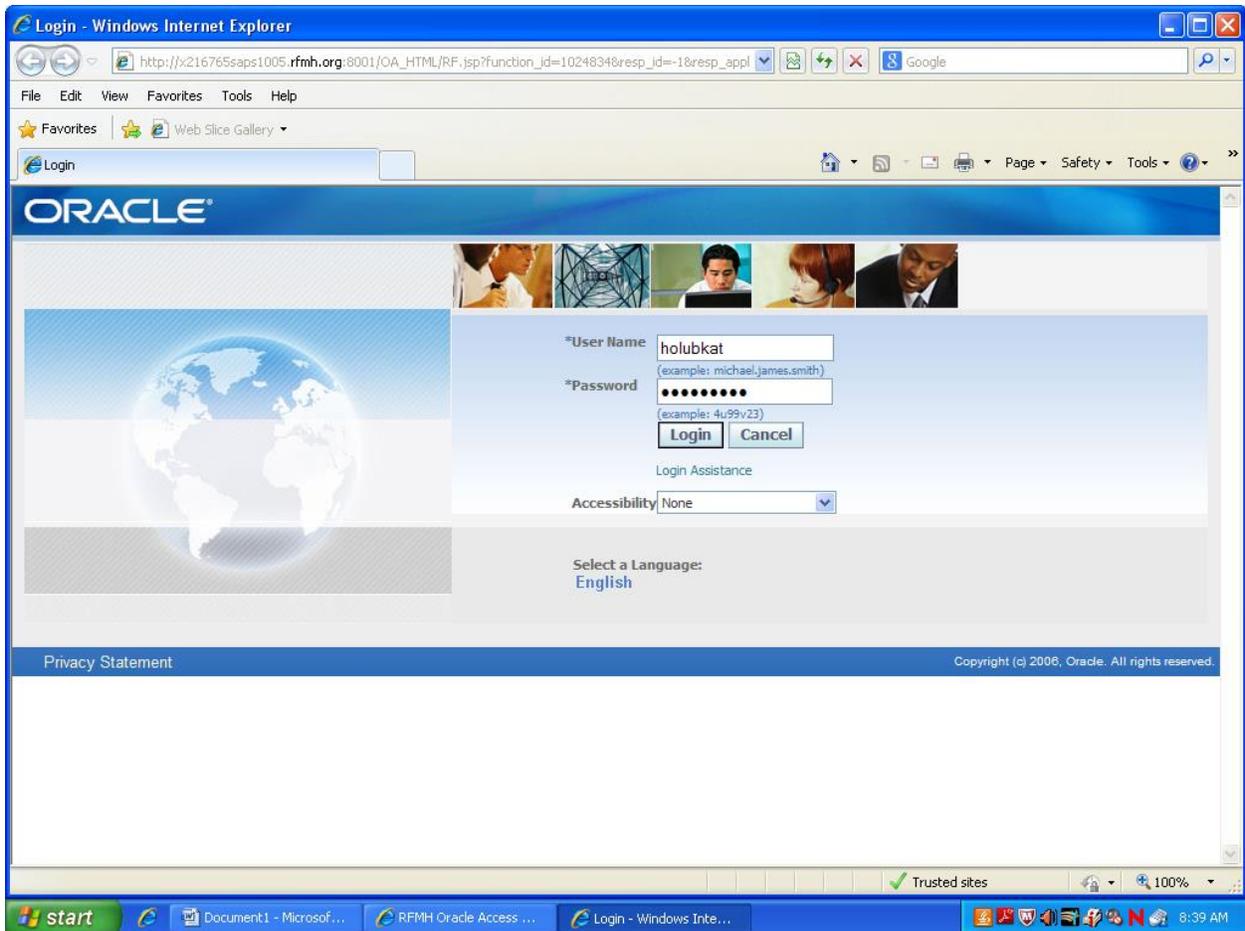


Click on **Information Technology**>**Oracle Access**.



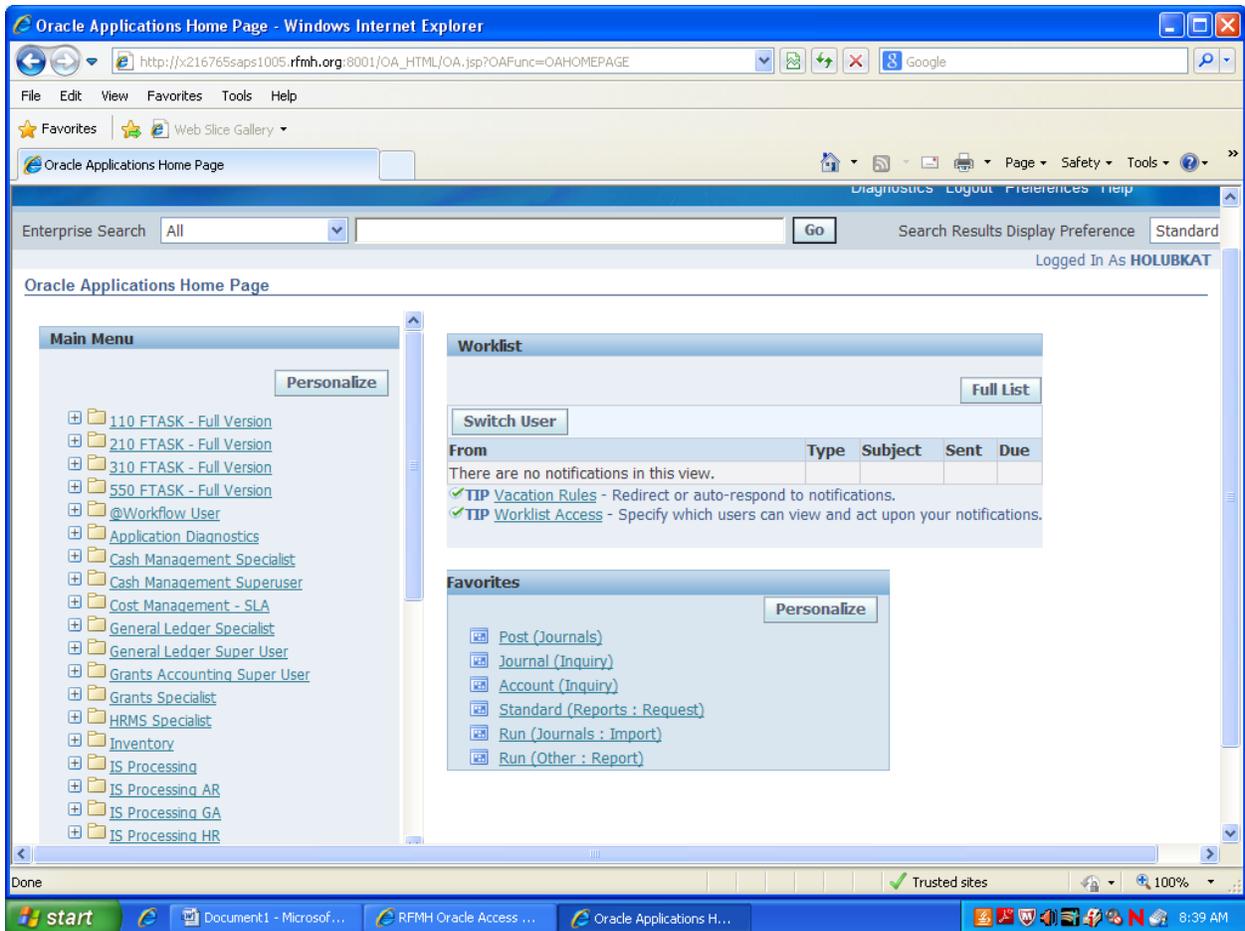
Under the **Testing & Development** menu, click on **Oracle Instances >TESTMH R12**.

Note: This is a good page to save as a favorite or as a shortcut to your desktop, or you may choose to save the actual login page for the instances you use. See the end of this document for instructions on how to save as a favorite or shortcut.



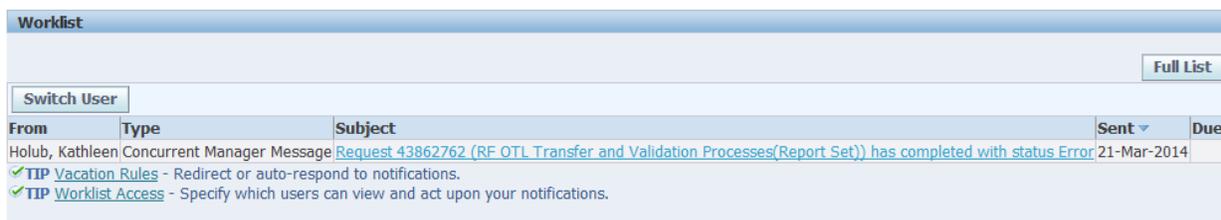
Enter your **User Name** and **Password**. Click on **Login**.

Note: If you forget your password, you can use the **Login Assistance** link to have it reset and a new one emailed to you. This feature is available to any employee who does not have access to HR responsibilities.

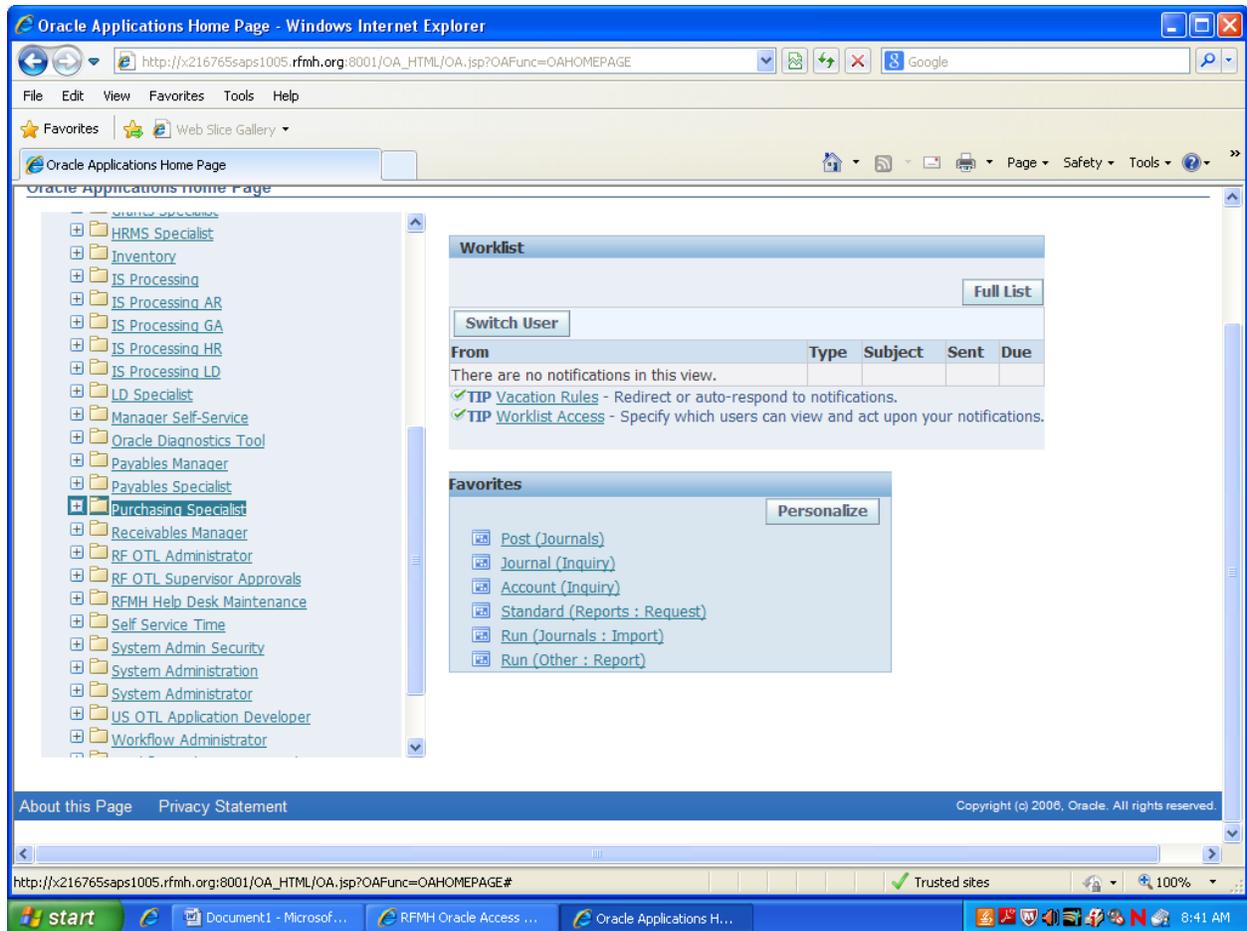


If you have favorites that transferred in from Oracle 11i, they may or may not work in R12. If the menu paths are the same, they will work, but if they are not, the favorite will need to be deleted and re-created. Click the **Personalize** button in the **Favorites** window to add/delete/re-organize your favorites.

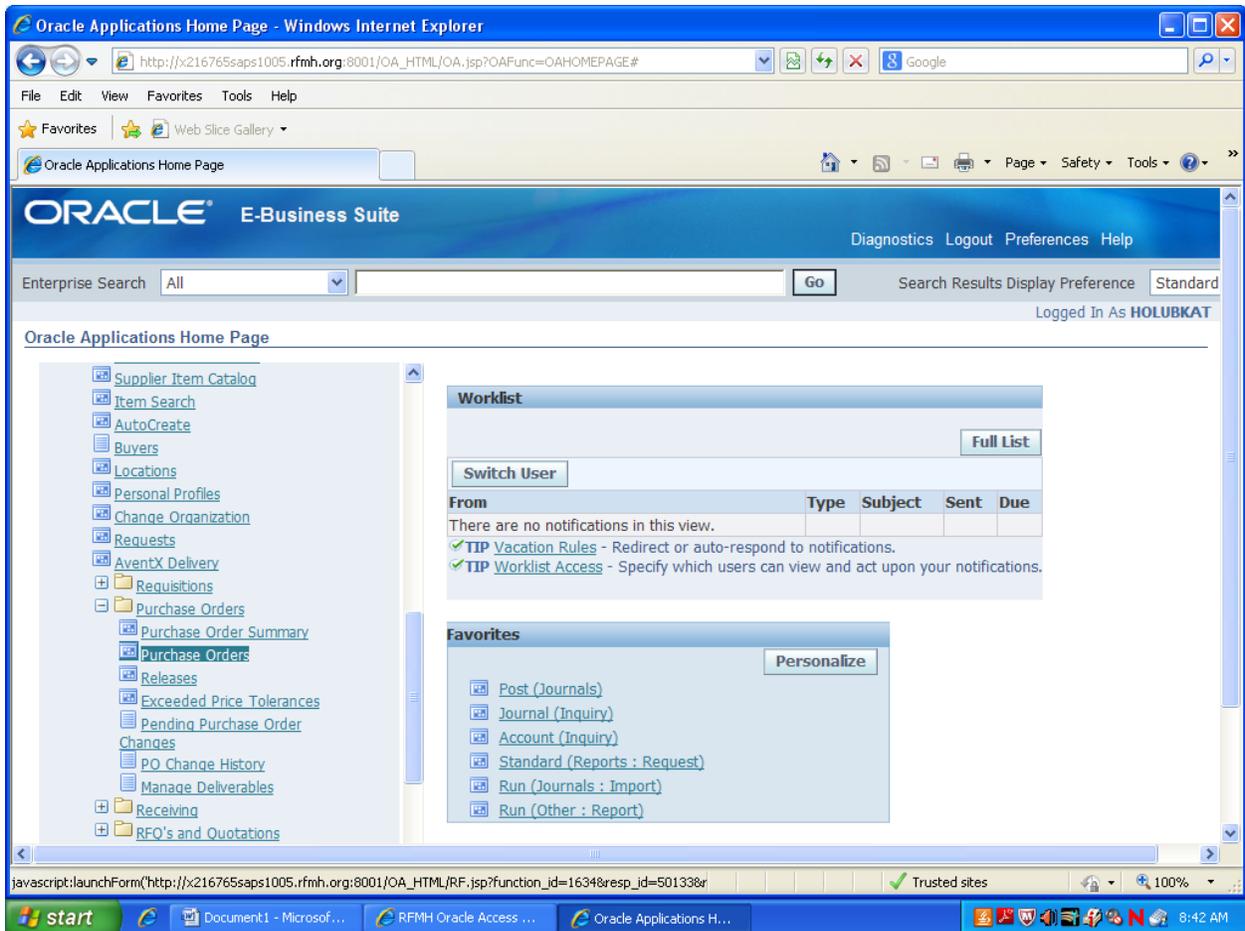
New in R12!



If you have items to act on in your **Worklist**, you will now see them on the **Oracle Applications Home Page**. You can act on them from here or access your **Worklist** from within a responsibility.



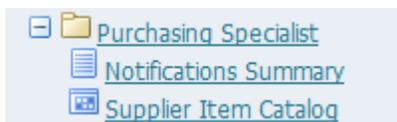
Click on a link in the left pane of the **Oracle Applications Home Page** to choose a responsibility.



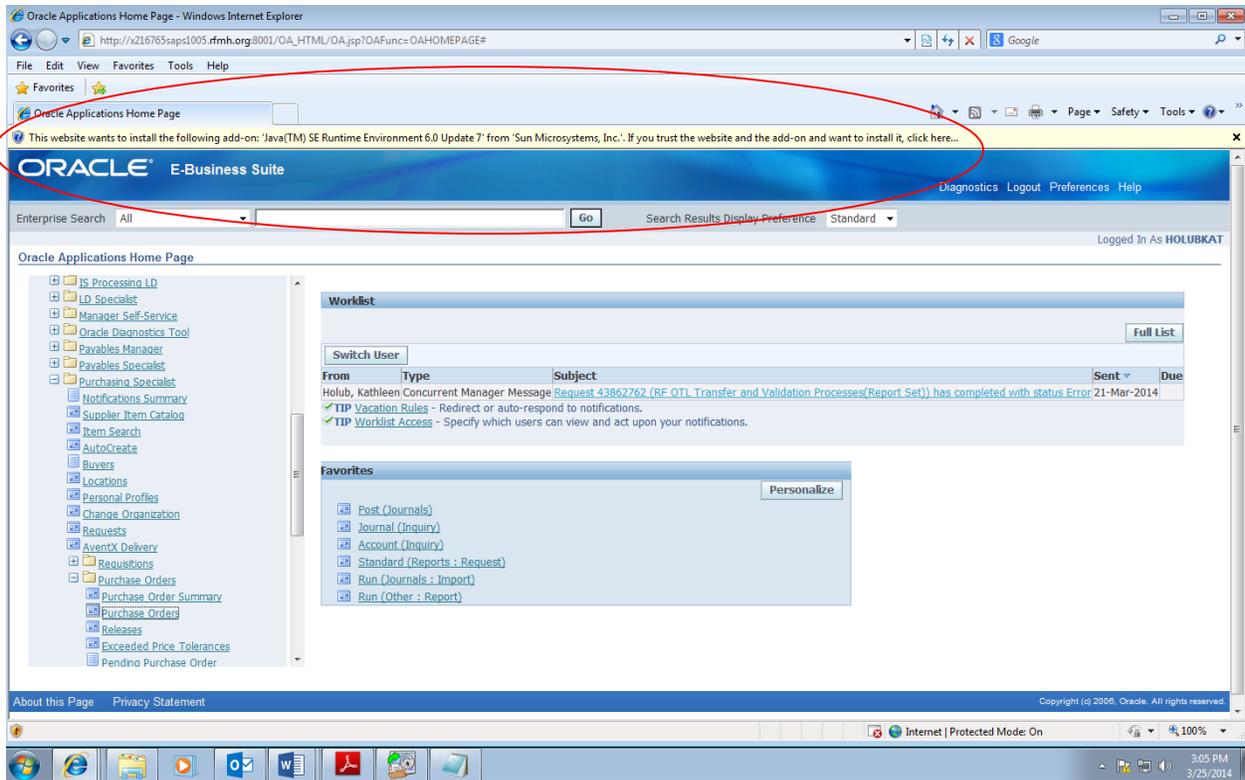
The available options will open in a tree format. Click the successive links until you open the form or webpage you are looking for.

Note: As these underlined options are links, you only need to left click once on them. There is no need to double click.

New in R12!



When viewing options in the **Oracle Applications Home Page**, the  icon indicates that a webpage will be opened in your browser if that link is clicked. The  icon indicates that a form will be opened.

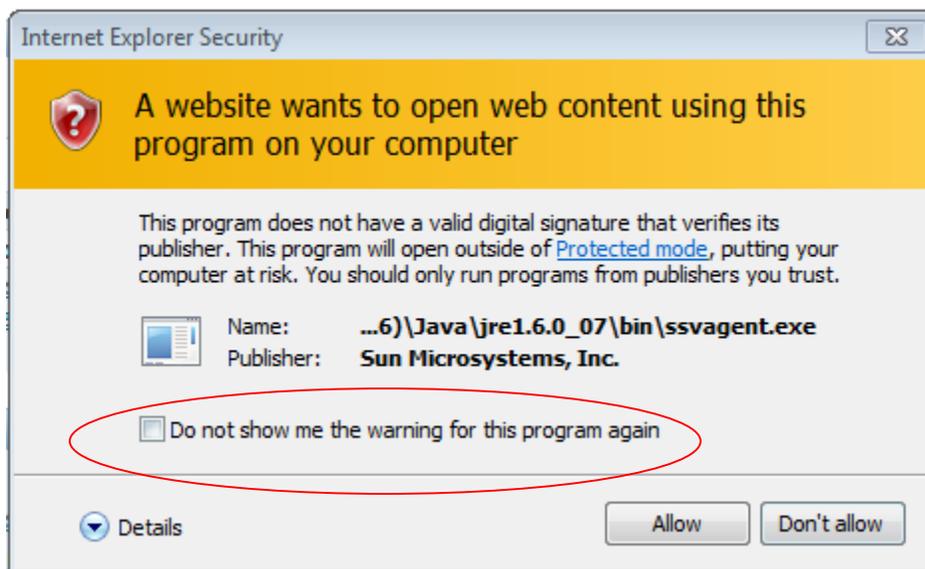


The first time you login, you should see a warning indicating that the website wants to add a Java add-on. Click the message to allow this to initiate. Then click on **Install this Add-on for all users on this computer**.

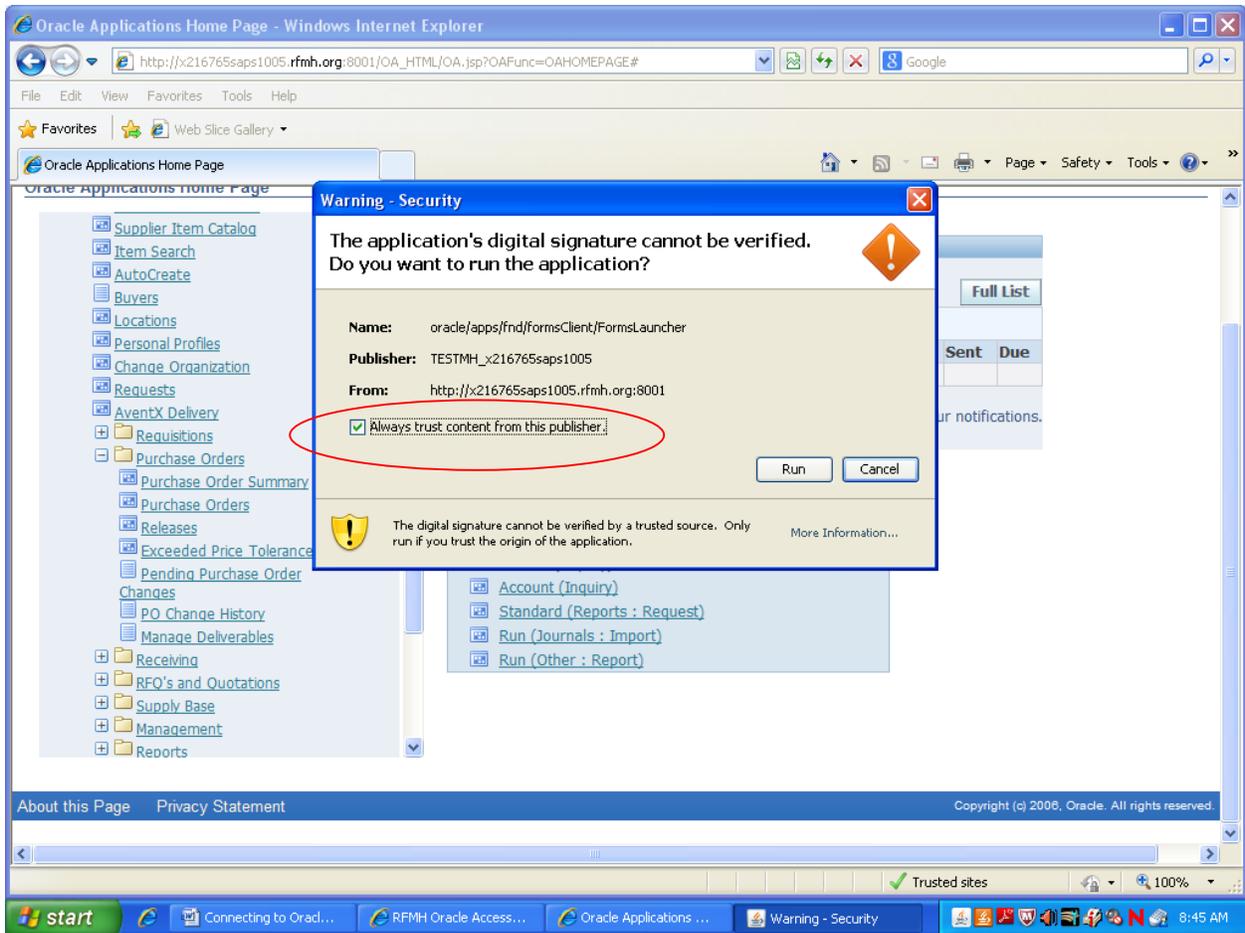
Once you do this the first time, you will not have to do it again.



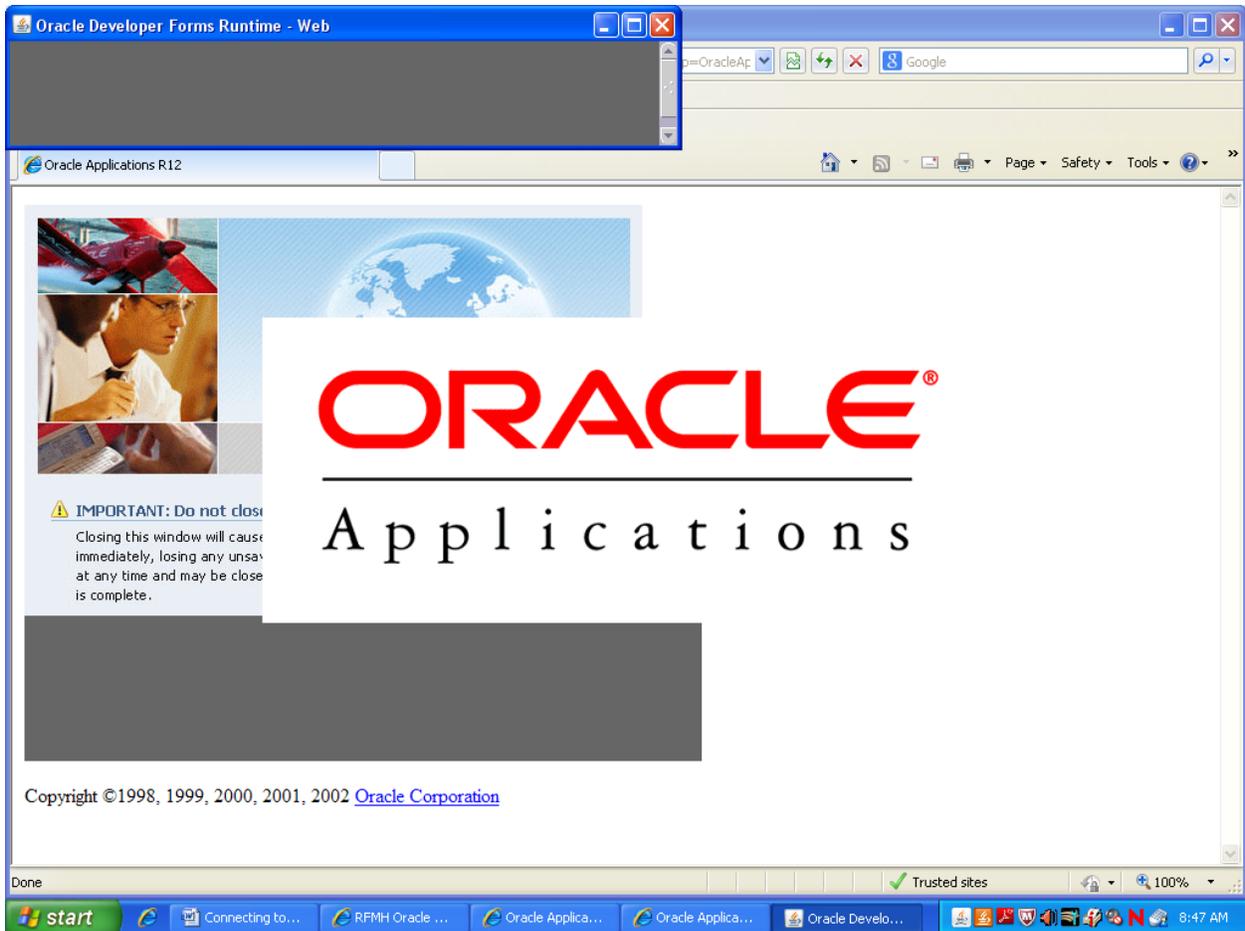
You will see this progress page as the Java software loads.



Click on the checkbox circled above and then click on **Allow**.



The first time you launch a form in R12, you will see the dialog box above. Click the checkbox for **Always trust content from this publisher** and click the **Run** box. By clicking the checkbox, you will bypass this dialog box in future logins.

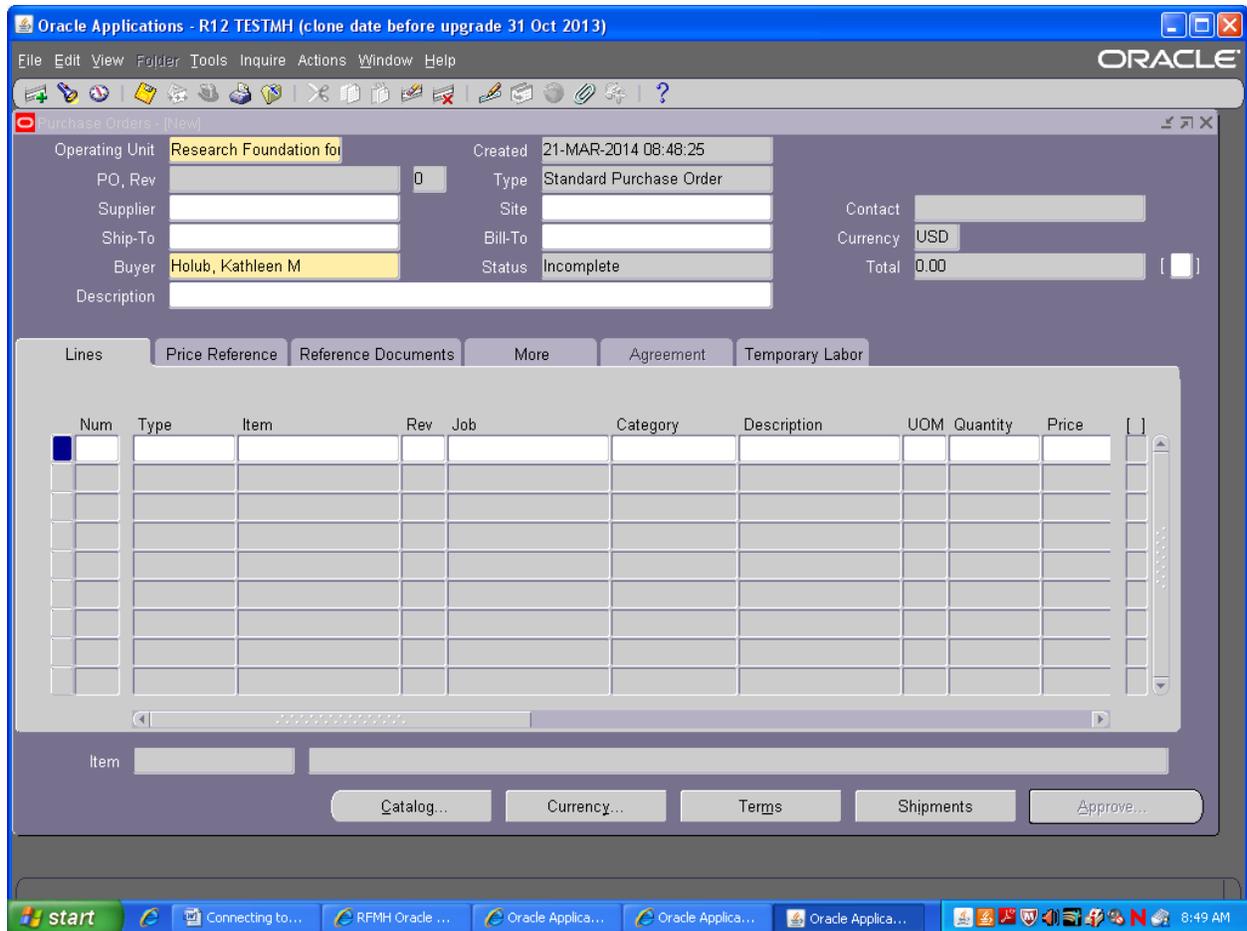


Oracle will start to launch the form.

This can take several minutes the first time you log in to the R12 instance.

Just be patient and your form will launch.

You will notice that some forms from 11i are now webpages in R12. The majority of the functionality is the same, but the look and feel may be different for the user.

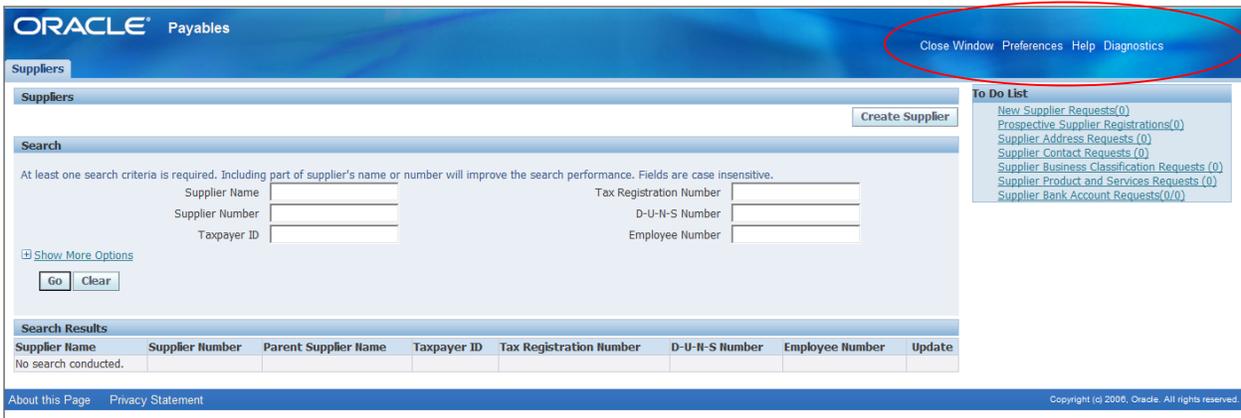


The requested purchase order form is viewed above.

Navigation



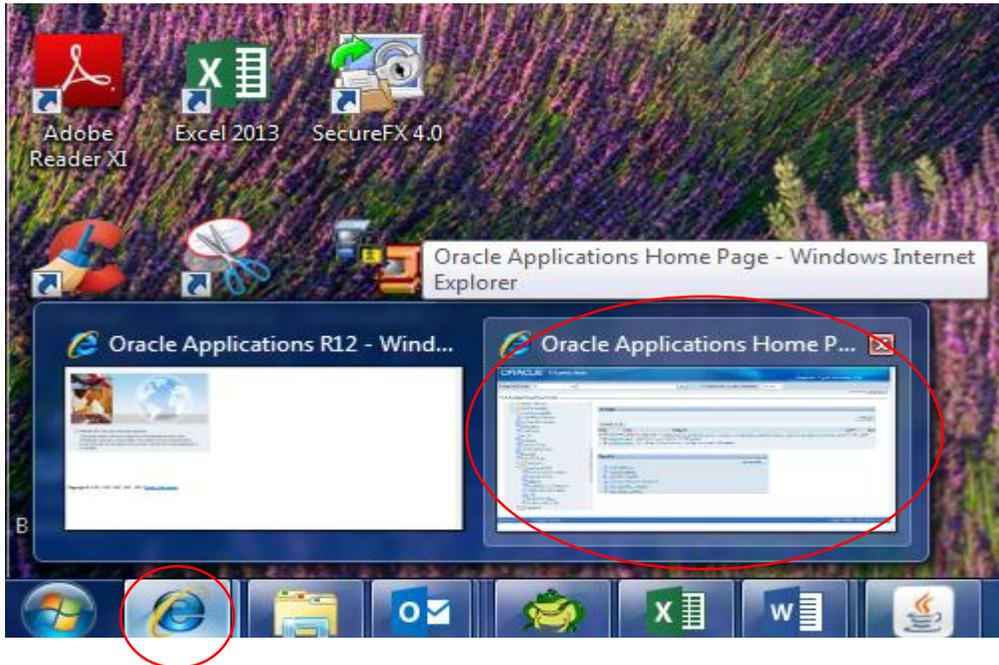
The same toolbar that you are familiar with in 11i, is available in R12.



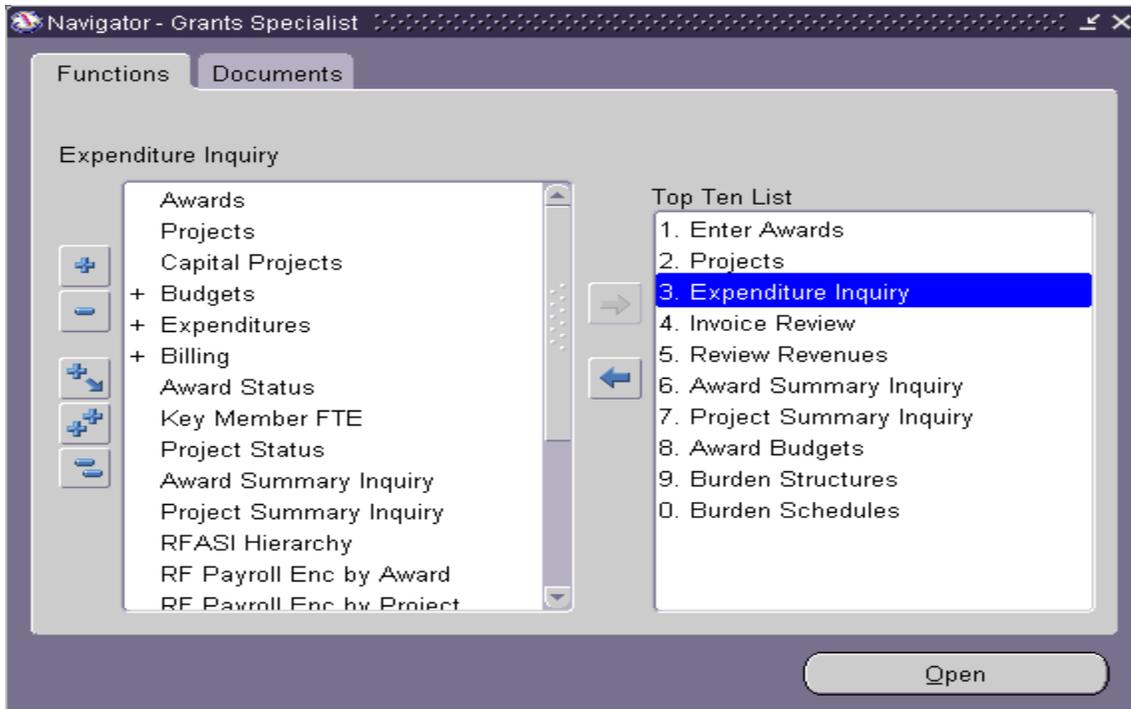
On Oracle R12 webpages, use the navigation options at the top (and sometimes bottom center) of the web page to navigate to other webpages or back to the **Oracle Applications Home Page**. The **Close Window** link takes you back to the **Oracle Applications Home Page**.

Note: Unless specifically instructed to do so, do not use the **Back** button on your browser when navigating through the Oracle R12 webpages.

To return to the **Oracle Applications Home Page** in R12 from any form or webpage, you can always click on the browser icon on your taskbar and then choose the **Oracle Applications Home Page**.



If you close out of an Oracle form (not a webpage) by using the **X** in the upper right hand corner, you will be brought to the **Navigator** page that you are familiar with in Oracle 11i.



Users should become comfortable using both the **Oracle Applications Home Page** as well as the older **Navigator** page.

11i to R12 Differences

The majority of the changes between Oracle 11i and Oracle R12 are behind the scenes. However, other than the more web based look and feel of R12, you will notice some changes as you use the familiar forms.

For instance, on the **Purchase Order Summary** form and a few others, you will notice a field for **Operating Unit** that did not exist in 11i. This field will default in “**Research Foundation for Mental Hygiene Inc**” and you do not need to change it or enter the information in at any time.

The screenshot displays the Oracle Applications R12 TESTMH interface. The window title is "Oracle Applications - R12 TESTMH (clone date before upgrade 31 Oct 2013)". The menu bar includes "File", "Edit", "View", "Folder", "Tools", "Inquire", "Window", and "Help". The toolbar contains various icons for file operations and navigation. The main window is titled "Find Purchase Orders" and features a search form with the following fields:

- Operating Unit:** Research Foundation (highlighted with a red circle)
- Number:** [Text Field]
- Release:** [Text Field]
- Supplier:** [Text Field]
- Ship-To Org:** [Text Field]
- Bill-To:** [Text Field]
- Ship-To:** [Text Field]
- Line:** [Text Field]
- Shipment:** [Text Field]
- Type:** [Text Field]
- Currency:** [Text Field]
- Site:** [Text Field]
- Show External Locations
- Line Type:** [Text Field]
- Buyer:** [Text Field]
- View Releases
- Consumption Advice
- Global Agreement

Below the search form, there are tabs for "Line", "Date Ranges", "Status", "Related Documents", "Deliver To", "Accounting", and "Projects". The "Line" tab is active, showing a list of search criteria:

- Item, Rev:** [Text Field]
- Job:** [Text Field]
- Category:** [Text Field]
- Description:** [Text Field]
- Supplier Item:** [Text Field]
- VMI:** [Dropdown Menu]
- Consigned:** [Dropdown Menu]

On the right side, there is a "Results" section with radio buttons for "Headers", "Lines", "Shipments", and "Distributions". At the bottom, there are four buttons: "Clear", "New Release (B)", "New PO", and "Find (J)".

Other forms, such as the **Project Expenditure Inquiry** form in Grants have an updated look with tabs to facilitate use.

11i version:

The screenshot shows the Oracle Applications 11i interface for the 'Find Project Expenditure Items' form. The window title is 'Oracle Applications - PRODMH_NEW'. The menu bar includes 'File', 'Edit', 'View', 'Folder', 'Tools', 'Reports', 'Window', and 'Help'. The toolbar contains various icons for navigation and actions. The main area is a search form with the following fields:

- Project Number (with a dropdown arrow)
- Task Number
- Award Number
- Employee Name
- Supplier Name
- Expenditure Org
- Expend Typ Class
- Expenditure Type
- Resource Org
- Non-Labor Resource
- Item Dates (with a date range selector)
- Expnd Ending Dates (with a date range selector)
- Expenditure Batch
- Transaction Source
- Assignment
- Work Type
- Set of Books Currency (set to USD)
- Project Name
- Task Name
- Award Name
- Employee Number
- Supplier Number
- Job
- Expenditure Category
- Inventory Item
- WIP Resource
- Trans Id
- Billing Status (dropdown menu)
- Billable (dropdown menu)
- Billing Hold (dropdown menu)
- Billed (dropdown menu)

At the bottom, there is a checkbox for 'Exclude Net Zero Items' and three buttons: 'Mass Adjust', 'Clear', and 'Find'.

R12 version:

The screenshot shows the Oracle Applications R12 interface for the 'Find Project Expenditure Items' form. The window title is 'Oracle Applications - R12 TESTMH (clone date before upgrade 31 Oct 2013)'. The menu bar includes 'File', 'Edit', 'View', 'Folder', 'Tools', 'Reports', 'Window', and 'Help'. The toolbar contains various icons for navigation and actions. The main area is a search form with the following fields:

- Project Number (with a dropdown arrow)
- Task Number
- Award Number
- Trans Id
- Expend Typ Class
- Item Dates (with a date range selector)
- Project Name
- Task Name
- Award Name
- Expenditure Org
- Expenditure Type

Below the search fields is a horizontal row of seven tabs: 'Expenditure', 'Billing', 'Resource', 'Supplier', 'Cross Charge', 'Provider/Receiver', and 'Capital'. The 'Expenditure' tab is selected. Below the tabs are two main sections:

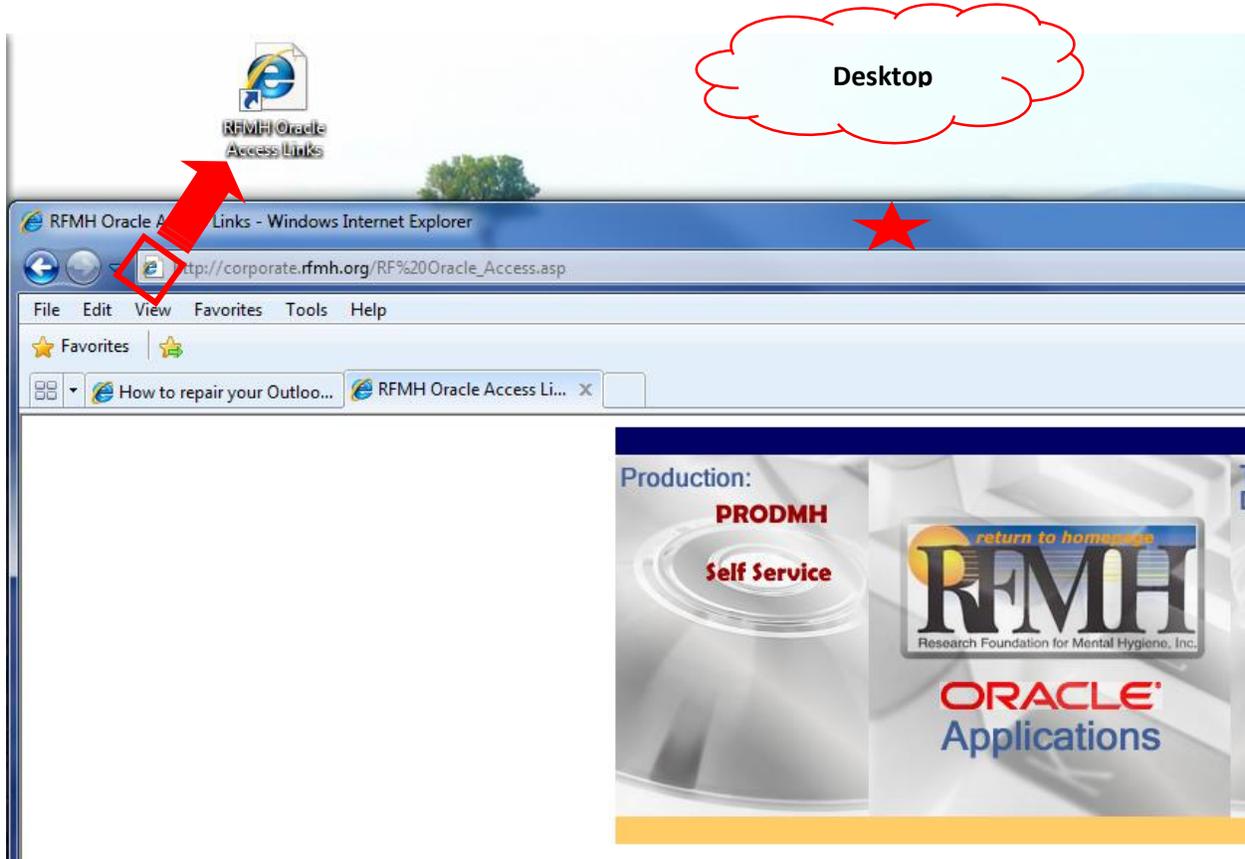
- Expenditure**: Expenditure Category, Expnd Ending Dates (with a date range selector), Expenditure Batch.
- Other**: Transaction Source, Work Type, Costed Processing Status (dropdown menu).

At the bottom, there is a checkbox for 'Exclude Net Zero Items' and three buttons: 'Mass Adjust', 'Clear', and 'Find'.

Once you use these forms a few times, you will notice that the content is largely the same, and it is just the format is different.

Save a Shortcut to your Desktop

Start by minimizing all other open programs so that only the webpage you want to save as a shortcut is visible.

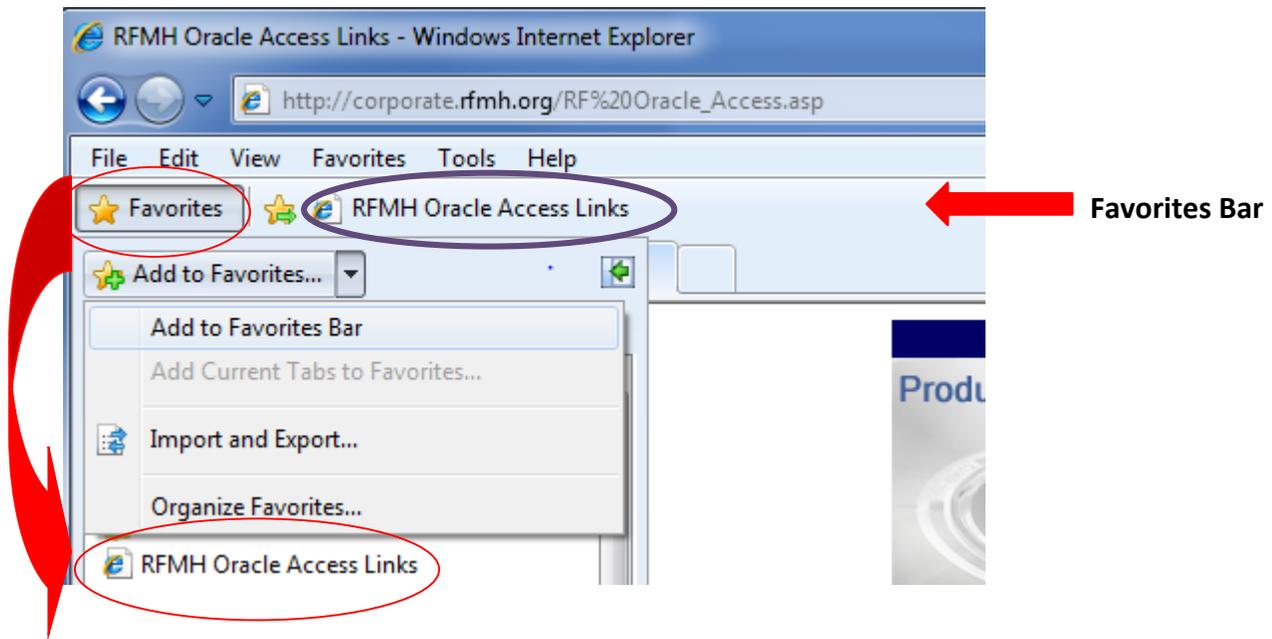


Make the page webpage smaller so you can see part of the desktop behind it. You can do this by simply left clicking on the header bar (see the red star above) and dragging the window down a bit to expose the desktop area behind it.

On pages that have a **Restore Down** icon,  which can be found between the **Minimize** and **Close** icons on the top right corner of some webpages, you can use that to show the desktop as well. (The Oracle pages do not have this option, but these instructions can be used for other websites as well.)

Then, left click on the small icon in the **Address Bar** for the webpage and drag it to your desktop and let go. The new shortcut is saved to your desktop and ready for use. When you view your entire desktop, you can drag and drop the new icon to any location you desire on your desktop.

Save a Webpage as a Favorite



From your browser, access the page you want to save as a favorite and click on **Favorites** and then the **Add to Favorites...** button. You can then rename the **Favorite**, choose the folder to save it to and then click **Add**. To open the page again, open your browser, click on **Favorites** and then choose **RFMH Oracle Access Links** (or the desired webpage) from the list below.

Note: You can use the **Organize Favorites** button seen above to move the favorites you use the most to the top of your list.

Alternatively, you can click on the **Add to Favorites Bar** button  to add the webpage to your **Favorites Bar**, as seen circled in purple above. (This can also be done by clicking on **Favorites** and then click on the arrow to the right of the **Add to Favorites...** button to show the drop down box and then choose **Add to Favorites Bar**.) To open the page again, open your browser and click on **RFMH Oracle Access Links** from the **Favorites Bar**.

Questions/Support

Please send any R12 questions or issues to the RFMH Helpdesk at: RFMHHelpDesk @RFMH.ORG

Please be sure to include the instance that your issue relates to TESTMH, DEVMH, etc., so that we can differentiate them from PRODMH (production) tickets.

Frequently Asked Questions (FAQs)

Why did RFMH Upgrade from Oracle 11i to Oracle R12?

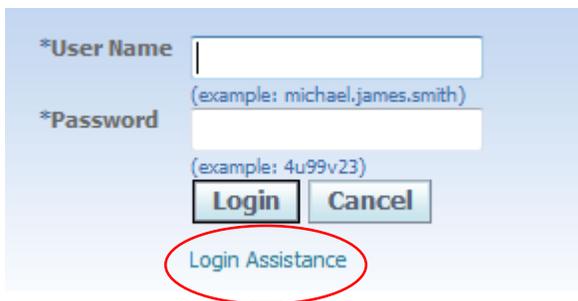
As with any computer software, there are constant updates to improve processes, allow for new mandatory regulatory issues/updates and to fix issues. As such, Oracle periodically de-supports older versions and requires users to move to the newer versions to continue to receive the most up to date patching and support. This allows them to focus on the newer versions without having to continually write code for older ones. RFMH was required to move to R12 in order to continue to receive the mandatory year end HR patching and other updates/support that are required in order to be in compliance with regulatory authorities and conduct our day to day business.

Can I still view all the transactions from prior years in R12?

Yes, all transactional data was brought forward from 11i to R12. You can see all the awards, projects, AP, PO, Payroll data etc. that was there before the conversion.

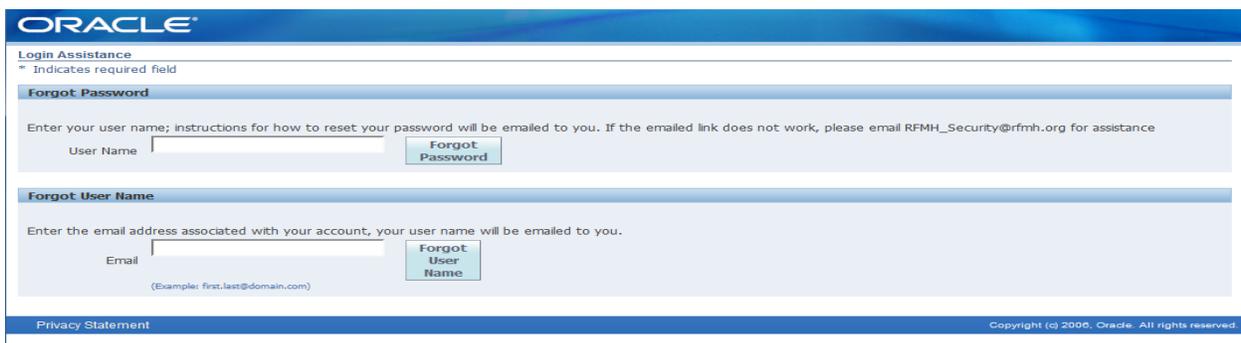
Can I still reset my password from the Login page?

Yes, look for the **Login Assistance** link under the **Login** button. Once you click the **Login Assistance** button, you will be brought to a page where you can request assistance for either a forgotten password or username.



A screenshot of a login form with the following elements:

- *User Name: (example: michael.james.smith)
- *Password: (example: 4u99v23)
- Buttons: Login, Cancel
- Link: Login Assistance (circled in red)



The Oracle Login Assistance page includes the following sections:

- ORACLE** logo and "Login Assistance" header.
- Legend: * Indicates required field.
- Forgot Password** section: "Enter your user name; instructions for how to reset your password will be emailed to you. If the emailed link does not work, please email RFMH_Security@rfmh.org for assistance." Includes a "User Name" input field and a "Forgot Password" button.
- Forgot User Name** section: "Enter the email address associated with your account, your user name will be emailed to you." Includes an "Email" input field and a "Forgot User Name" button.
- Footer: "Privacy Statement" and "Copyright (c) 2006, Oracle. All rights reserved."

Once you submit the required information, you will receive a confirmation that your request was processed.

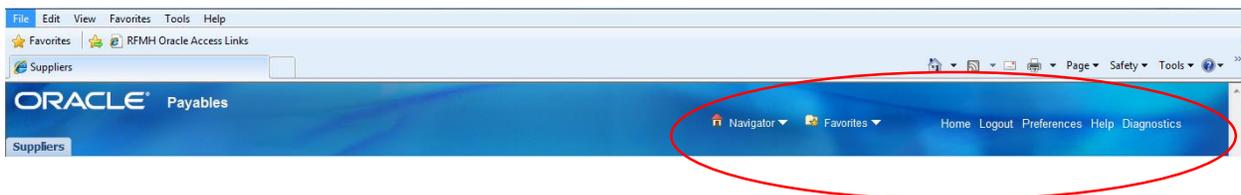


If you need further assistance, please send an email to: RFMH_Security@rfmh.org

When on an R12 webpage, how do I get back to the menu to go to another webpage or form?

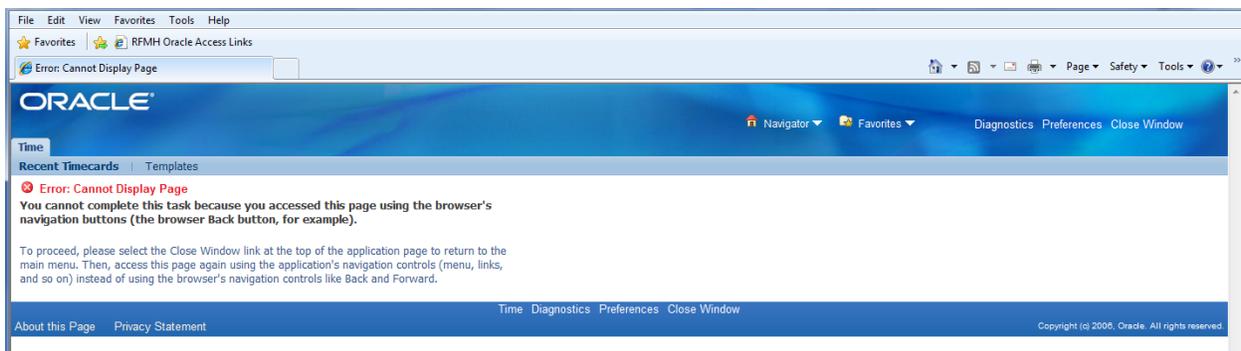
Your options vary depending on the webpage you are in. Look at the top right corner of the page, your options may include:

- Home – Which will take you back to the Oracle Applications Home Page
- Close Window - Which will take you back to the Oracle Applications Home Page
- Logout – Which will log you out of your Oracle R12 session
- Navigator – Use the drop down to see your responsibilities and choose one from the list
- Favorites – If you have Favorites set up, use the drop down to choose one from your list
 - You can also Manage your Favorites and Add Favorites from here



Error Message

The error message below is usually seen when the user has clicked to perform an action in Oracle and then clicks again before the system has time to complete the first action.



If you receive this message, use the **Close Window** option on the top right of the page to return to the **Home Page** and retry your request. Then, be sure to allow the system to complete an action before clicking to request another. This is normal behavior when working in webpages.