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Browser Recommendations

See University IT Browser Recommendations for details.

<table>
<thead>
<tr>
<th>Application</th>
<th>IE</th>
<th>Firefox</th>
<th>Safari</th>
<th>Chrome</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expense Requests, iProcurement, PCard, iJournals, iBudgets</td>
<td>11*</td>
<td>45.x**</td>
<td>6+</td>
<td>n/a</td>
<td>*IE 11 is only supported in Compatibility Mode. **Firefox not supported on Mac. **Firefox ESR is the supported browser.</td>
</tr>
<tr>
<td>Oracle Financials Core Applications (e.g., Oracle Labor Distribution, Sunflower Assets, other Core Oracle Modules)</td>
<td>11*</td>
<td>45.x**</td>
<td>6+</td>
<td>n/a</td>
<td>Java version Update 8 *IE 11 is supported with Compatibility mode. **Firefox ESR is the supported browser.</td>
</tr>
<tr>
<td>Commitment Management System (CMS)</td>
<td>11*</td>
<td>n/a</td>
<td>6+</td>
<td>n/a</td>
<td>*IE 11 is only supported in Compatibility Mode.</td>
</tr>
</tbody>
</table>
For more system information: See also,

- Clearing Browser Cache / History
- Oracle Upgrade: Current Issues and Resolution Instructions

Technical Assistance: If you need further assistance with browser maintenance, contact the University IT Help Desk at (72)5-HELP or online at Stanford Services.

**Introduction**
Stanford University currently uses the Oracle E-Business Suite (EBS) to support its Financial and Enterprise Asset Management operations. Stanford University upgraded Oracle to Release 12.2.6 on 11/27/17.

**Support Video Snippets**
Here are some video snippets providing a quick walk-through of what you’ll see in Oracle.

- **Overview of the Oracle Upgrade** (6:10)
- **Tour the Oracle Financials Home Page** (4:00)
- **Set Up Custom Start Page** (1:40)
- **Share Worklists** (2:30)
- **Set Up Header Icons or Links** (1:40)
- **iProcurement One-Page Checkout** (1:30)
- **Set Up an Icon Style Home Page** (1:40)
- **Personalize Navigator** (2:00)
- **Manage Favorites** (1:30)
- **Use Table Functions** (2:20)

**Access Oracle**

- Go to [https://ofweb.stanford.edu](https://ofweb.stanford.edu)
- Log in using your SUNet ID, password and two-step authentication (if not already completed)

On the Oracle Financials landing page, you will find information about:
- System Status
- Planned Outages
- Other messages of interest

Click Login to continue to the Oracle Financials Home Page.
Oracle Financials Home Page

The default Oracle Financials Home Page looks like this.

The default view is LIST STYLE. Note some of the features below:

1. **Header icons** for application Favorites, system Settings (Preferences and Worklist Sharing), and Worklist (Workflow Notifications)

2. **Announcement** panel for news affecting Oracle Financials users

3. **Navigator** section where all responsibilities, applications and modules for which you have authority are displayed and can be launched

4. **Worklist** section displaying all your open Workflow Notifications (also available from the Worklist icon in the header)

5. **Vacation Rules** setup is accessible from the home page
Oracle Financials Home Page – Icon Style

If you prefer, the home page can be changed to an **Icon Style**, which displays icons for applications you’ve defined as **Favorites**. To switch to Icon Style:

1. Select **Settings > Preferences** in the header.

   ![Preferences Menu](image)

2. In the General Preferences Window, select **Icons** as the Home Page Style and click **Apply**.

   ![General Preferences Window](image)

Your Oracle Home page will now display in **Icon Style**.

![Oracle Home Page, Icon Style](image)
Announcement panel for news affecting Oracle Financials users (just like List Style)

Navigator Icon available as a drop down with all your authorized applications

Favorites in header or the Add to Favorites icon to add/delete/rename/reorder applications in Favorites that display as icons (see Managing Favorites below)

Icons display for applications in Favorites for quick access. Click on an icon to launch the application

Note: Only Applications that are in Favorites will display as icons. You must add each application to Favorites to be able to see them as Icons on the page.

Managing Favorites (List or Icon Style)

Favorite applications can be accessed and launched using Favorites in the header.

To manage Favorites (add/delete/rename/reorder applications):

1. Click on Favorites in header
2. Click on the pencil on the bottom left.

OR... Click the Add to Favorites icon in Icon Style:
Adding Favorites

Select a **Responsibility** and click **Go**

Select all or just the specific functions you want to add to your **Favorites**

Click **Add to Favorites**

You must click **Apply** whenever you make a change to save that action

**Tip:** If you use **SU Inquiry Tools and Forms**, use Manage Favorites to add the inquiry tools you use to your Favorites. Each of the 8 SU Inquiry Tools and Forms must be added individually. If you also use the Icon Style home page, those inquiry tools will appear as icons on your home page for quick access.
Changing Favorites

To add more applications to Favorites, you must select each responsibility separately and add as stated above.

1. To change the order of your Favorites, click the arrows in the Move Up Down Column.

2. Change the name of any of your Favorites by typing in the new name under the Favorite Column.

3. You can add non-Oracle websites to your Favorites by entering a name you choose as the Favorite and the URL, and clicking Add Outside Link.

Tip: Home page icons will appear in the order listed in Favorites.
Available via Preferences

Select **Settings** (Gear Icon) and select **Preferences**.

On the **General Preferences** screen, you can,

1. Change the Home Page Style from List to Icons.
2. Set the Header display to Both Links and Icons, Icons Only, or Links Only.
3. Specify to **bypass the Oracle Home page** at login by selecting a frequently used application as your **Start Page**.

**Note:** Even when you select a **Start Page**, you can go to the Oracle Home page using the Home or Return to Portal icon in the header.

4. Set up Worklist Sharing.
Page Header Display Styles

Default Header View is **Both Links and Icons**

- **Icons Only** (the name of the icon appears when you hover over it)

- **Links Only**

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**Worklist Sharing**

The functions that were previously called Worklist Access or Manage Proxies are now included under the **Worklist Sharing** function.

You can access **Worklist Sharing** from Settings or in Preferences.

If you set someone up to share your Worklist, they will see a header icon for **Switch User** that allows them to access your worklist, access your account, and act on your behalf.
Enhanced Table Icons and Functions

Enhanced table functionality can be found in native Oracle applications such as Expense Reports, PCard, and iProcurement. This functionality is not currently available in other applications such as Non-PO Payment in Expense Requests, Gift Transmittals, PTA Manager, etc.

You’ll see one or more of these icons when enhanced table functionality is available. This functionality may not be available in customized applications, such as Non-PO Payment and several of the Inquiry Tools.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Add New" /></td>
<td>Adds a new line or row in the table.</td>
</tr>
<tr>
<td><img src="image" alt="Detach Table" /></td>
<td>Entire Table pops out for easier viewing of all lines.</td>
</tr>
<tr>
<td><img src="image" alt="Refresh Table" /></td>
<td>Refreshes the table to include current data.</td>
</tr>
<tr>
<td><img src="image" alt="Reset Table Settings" /></td>
<td>Resets table settings back to original.</td>
</tr>
<tr>
<td><img src="image" alt="Table Settings" /></td>
<td>Allows you to edit the table by selecting columns you do not want to see and changing the order of columns.</td>
</tr>
<tr>
<td><img src="image" alt="Column Freeze" /></td>
<td>Allows you to select from the left side the columns you do not want to move. As you select columns further to the right, all those from the far left to your selection are frozen. This functionality becomes active when there is a horizontal scroll bar required to view all data in the table.</td>
</tr>
</tbody>
</table>

Other Functionality available:

- **Change the order** of the columns by clicking on a column and dragging where you want it.
- **Remove a column** by clicking on that column and selecting the minus sign above the column.
- **Decrease or Increase the width of a column** by dragging the side of the column. You can decrease to the edge of the column heading name.
- **After detaching the table**, you can select the similar icon with arrows inverted to return the edited table to its original position, or you can click the "x" on the top right of the window.

**Tip: CUSTOMIZE YOUR TABLE**: If you modify the table (make the columns wider, change the order of the columns, etc.), the table will remain like that until you modify again or select Refresh Table. This **customized view** will be maintained for you even after logging out of Oracle and logging on again.
Example of Enhanced Table Icons

- **Enhanced Table Icons to modify your view of the table**
- **Increase column width to the “Title Name” (move border like Excel)**
- **Refresh the Table back to the original settings**
- **Hide a column by hovering over it & clicking the minus sign**

iProcurement Home Page View

The iProcurement Home Page has several **Header Icons** at the top of the page.
iProcurement Checkout Screen: Edit and Submit Requisition
The checkout process for Amazon for Business, SmartMart, and Non-Catalog Requests is a single page.

Clicking View Cart and Checkout takes you to the one-page **Edit and Submit Requisition** page.

![Edit and Submit Requisition Screenshot](image)

1. **Description**: Product ABC
   - Note to Approver: Department is out of this product and needs as soon as possible.

2. **Need-By Date**: 11-Oct-2017 00:00:00
   - **Requester**: Bell, Jayne
   - **Department Name**: Accounting
   - **Room**: 123
   - **Attention To**: John Smith

3. **My Favorite**
   - **Project**: Proc-Default
   - **Task**: 1
   - **Award**: A6464K
   - **Expenditure Type**: 66119
   - **Expenditure Item Date**: 06-Oct-2017

4. **Select Lines**
   - **Quantity Unit**: 1 EACH 1 USD
   - **Amount USD**: 1.00
   - **Tax Category**:

5. **To override Tax, select Tax Category**

6. **Guidance for Ensuring Price Reasonableness**
   - Check this box, you acknowledge compliance with the Price Reasonableness policy.

7. **Approvals**
   - (Name)
   - (Signature)

8. **Requisition Attachments**
   - It is strongly recommended that you attach Competitive Bids or a completed Single/ Sole Source Justification form.

9. **Single/Sole Source Justification form**

10. **Add Attachment**

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By checking this box, you acknowledge compliance with the Price Reasonableness policy.
Requisition Information - Review and edit information in description. Can add note to Approver in Justification field.

Delivery Information - This information can be brought in by your default preferences or you can complete the required (asterisked) fields here.

Billing Information - This information can be brought in by your default preferences or you can complete the required (asterisked) fields here. You can access My Favorites for the PTAEs entered in preferences.

Update, Copy or Delete - Select line(s) to change. You can select multiple lines to modify here.

Update Line - To edit one product line.

Change Tax Category - Override assigned tax.

Manage Approvals - Verify, add, or delete approvers.

Add Attachment - To attach back-up documentation

Check box - Check the Price Reasonableness policy acknowledgment box.

Save or Submit - Save to work on later or Submit to route for approval. Requisitions cannot be saved with errors. Either correct errors and save, or delete all lines to delete this requisition.

Navigation Tips
You can open any of the applications in a new Tab or Window by right-clicking on the application.

NOTE: To maintain top performance of Oracle, do not open more than two instances of Oracle at a time.
You can toggle between the native Oracle Applications via Favorites without going back to Home or Return to Portal, such as:

- SU Expense Requests
- SU Internet Procurement
- SU PCard and
- SU Workflow Notifications

Example of going from an application to another via Favorites

To Change Preferences for specific applications:
You must edit Preferences (select Settings > Preferences) while in iProcurement to be able to modify iProcurement Preferences: Shopping/Delivery or iProcurement Preferences: My Allocations default fields.

Note: Asterisked fields must be completed; other fields are optional.
You must edit Preferences (select Settings > Preferences) while in Expense Requests to be able to modify Expense Request Preferences: General, My Allocations (same as iProcurement page), My Approvers, My Events.
Questions / Support?

Contact the Financial Support Center:

- Call 650-723-2772
- Email finhelp@stanford.edu
- Submit a Support Request