### Oracle Upgrade Quick Start Guide

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#### Oracle Upgrade Rollout Schedule

- Wed, Nov. 22, 2017 - Oracle Financials will be taken offline at noon, as upgrade activities begin.
- Thu, Nov. 23, 2017 - Begin enjoying the Thanksgiving break!
- Mon, Nov. 27, 2017 - Oracle Financials will be back online at 6 a.m., in the upgraded 12.2.6 release.

**Note:** No changes to current transactions or preferences.

Submitted transactions, in-process transactions and workflow routings are not impacted and will be available in the new version of Oracle as they are now. In addition, all current Favorites, Preferences, Events, Worklist Sharing and Vacation Rules will carry over and also be available immediately.
Browser Recommendations

Browser recommendations remain the same as current Oracle. See University IT Browser Recommendations

<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>52.x**</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>52.x**</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>

Introduction

Stanford University currently uses the Oracle E-Business Suite (EBS) to support its Financial and Enterprise Asset Management operations. Stanford University is upgrading Oracle to Release 12.2.6 to be able to continue to use Oracle's Premier Support and to include new functional capabilities in the system. Some upgrade highlights include the following:

- **Stanford’s Cardinal colors** – Many Oracle applications, including Expense Requests, iProcurement, and PCard, will sport Stanford’s Cardinal colors for a consistent, branded look and feel.
- **New Oracle Financials home page** look and feel – new functions in header, options to personalize the layout in a List Style or Icon Style.
- iProcurement enhancement - **One-Page Checkout** for Non-Catalog Requests, SmartMart and AmazonBusiness.
- **Workflow Notifications** - All available on the Home Page for easier access for approvers and accessible in the header.
- **Enhanced Table Functions** in many applications. These enhancements include,
  - **Customize** your table as you would like it. You can refresh the screen in the future to go back to the default settings.
  - **Detach** the entire table
  - **Rearrange, hide, freeze or change the width of columns** (similar to OBI or Excel).
- Ability to **jump directly between some applications** (SU Expense Requests, SU Internet Procurement and SU PCard) without having to return to the home page – Access application via Favorites and the Navigator function from the header.
- **You can edit the titles of the Applications** on your Home Page or Favorites (for instance, SU Internet Procurement to just iProcurement) or you can add an outside link to access directly from your Oracle Home Page (for instance, Fingate or Admin Guide).
Support Video Snippets
Here are some video snippets providing a quick walk-through of what you’ll see in the upgrade.

- Overview of the Oracle Upgrade
- Tour the Oracle Financials Home Page
- Set Up Custom Start Page
- Share Worklists
- Set Up Header Icons or Links
- iProcurement One-Page Checkout
- Set Up an Icon Style Home Page
- Personalize Navigator
- Manage Favorites
- Use Table Functions

Access Oracle
The initial steps to access Oracle Financials System have not changed but you will see a new landing page before logging in:

Go to https://ofweb.stanford.edu

Below is the Oracle Financials System Status (landing) page.

The page contains,

- System Status
- Planned Outages
- Other messages of interest

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

The new Oracle Financials Home Page will look like this.

![Oracle Financials Home Page screenshot](image)

**The default view is LIST STYLE.** Notice the new Stanford color scheme, and the following updates:

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 directly from the home page
Oracle Financials Home Page – Icon Style

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

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

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

Your Oracle Home page will now display in **Icon Style**.
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. At rollout, if you have current favorites created, all those will be automatically loaded into your Favorites. You can still access all your other authorized Applications via Navigator.

Managing Favorites (List or Icon Style)

Favorite applications can be accessed and launched using Favorites in the header. (This functionality is like current Oracle with Favorites and Personalize on the right side of the Applications Home Page.)

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

1. Select a Responsibility and click Go
2. Select all or just the specific functions you want to add to your Favorites
3. Click Add to Favorites
4. 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.

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

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

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.

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1. Change the Home Page Style from List to Icons
2. Set the Header display from Both Links and Icons to Icons or Links Only
3. Bypass the Oracle Home Page to one of your frequently used applications, such as Expense Requests
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**

**Worklist Sharing**

The functions that were previously called Worklist Access or Manage Proxies are now included under the new **Worklist Sharing** function. All current Worklist Access and Manage Proxies data will be available under Worklist Sharing after the Oracle Upgrade rollout.

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

If you set someone up to share your Worklist, they will see a new 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.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Add New" /></td>
<td><strong>Add New:</strong> Adds a new line or row in the table. <strong>Note:</strong> In many tables, this new icon replaces the previously available Add button.</td>
</tr>
<tr>
<td><img src="image" alt="Detach Table" /></td>
<td><strong>Detach Table:</strong> Entire Table pops out for easier viewing of all lines.</td>
</tr>
<tr>
<td><img src="image" alt="Refresh Table" /></td>
<td><strong>Refresh Table:</strong> Refreshes the table to include current data.</td>
</tr>
<tr>
<td><img src="image" alt="Reset Table Settings" /></td>
<td><strong>Reset Table Settings:</strong> Resets table settings back to original.</td>
</tr>
<tr>
<td><img src="image" alt="Table Settings" /></td>
<td><strong>Table Settings:</strong> 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><strong>Column Freeze:</strong> 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](image)

**iProcurement Enhancements**

The overall look of the iProcurement Home Page has not changed but there are new header icons.
iProcurement Checkout Screen: Edit and Submit Requisition

The checkout process for Amazon for Business, SmartMart, and Non-Catalog Requests has been simplified into a single page.

Clicking View Cart and Checkout takes you to the new one-page, Edit and Submit Requisition page.
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1. **Requisition Information** - review and edit information in description. Can add note to Approver in Justification field.

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

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

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

5. **Update Line** - To edit one product line.

6. **Change Tax Category** - Override assigned tax.

7. **Manage Approvals** - Verify, add or delete approvers.

8. **Add Attachment** - To attach back-up documentation

9. **Check box** - Check the Price Reasonableness policy acknowledgment box.

10. **Save or Submit** - Save to work on later or Submit to route request for approval.

**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 2 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

While in Expense Requests, Click Favorites and select iProcurement to go directly to that Application

Questions / Support?
Contact the Financial Support Center at finhelp@stanford.edu or (650) 723-2772.