

Setting up Shortcuts in CUFS

Setting up Favorites from the E-Business Suite Homepage

Favourites enables you to create a list of most commonly used tasks, without the need to drill down on a particular responsibility. The following steps guide you through how to set up Favourites.

1. From the E-Business Suite home page, click on **Personalize** in the **Favourites** section of the screen.



2. Click on the **Responsibility** drop down list to select the relevant responsibility and click on the **Go** button.

	Customize Favorites										
							Cancel Apply				
Searc	ch and	l Select									
Fu	nction	Prompt			Responsibility						
	Des	scription			Go						
Select Function Prompt			ipt	Description	Menu Hierarchy	Re	sponsibility				
No search conducted.			ucted.								
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3. The tasks for the selected responsibility will display. **Tick** the boxes adjacent to the tasks that you want to add to your Favourites list and click on the **Add** button.

Customize Favorites									
			Cancel Apply						
			Санссі Арріу						
Search and Select									
Function Prompt		Responsibility CAPSA AG: AP	P Invoice Manager						
Description		Go							
Select Functions: Add									
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Invoices		Entry	CAPSA AG: AP Invoice Manager						
Recurring Invoices		Entry	CAPSA AG: AP Invoice Manager						
Recurring Payment Calendar		Entry	CAPSA AG: AP Invoice Manager						
Funds Check Results		Entry	CAPSA AG: AP Invoice Manager						
Invoice Batches		Enquiry	CAPSA AG: AP Invoice Manager						
Invoices		Enquiry	CAPSA AG: AP Invoice Manager						
Ouick Invoices		Enquiry	CAPSA AG: AP Invoice Manager						
✓ I voice Overview		Enquiry	CAPSA AG: AP Invoice Manager						
Withheld Amounts		Enquiry	CAPSA AG: AP Invoice Manager						
Select Functions: Add									
Selected to Display									



4. The selected tasks will display at the bottom of the screen in the **Selected to Display** section.

TIP: If you have responsibilities for different departments you can change the name of the favourite at this point to make it easier to identify

TIP Only non oracle ebusiness suite links can be set to open in a new window.										
Select	Select Favorites: Remove									
Select A	Select All Select None									
		Move								
Select	Up	Down	Favorite	Des						
			AG - Enter Journals	Ente						
		\odot	Post (Journals)	Post						
			Journal (Enquiry)	Inqu						
Add URL										

5. Click on **Apply** to save the changes.

UNIVERSITY CAMBRID	OF GE ^{E-Business Suite}		
		Favorites 🔽	Logout Preferences Help
Oracle Applications Home Page			Logged In As FINTRAINING210
Maujaatas		Favorites	
CAPSA AG: AP Invoice Manager	Person Pe	nalize	Verview (Enquine)

6. Your E-Business Suite home page will display with links to your Favourite tasks at the right hand side.

Oracle Applications Home Page		Log	jed In As HRP38
Navigator		Favorites	Personalize
Application Diagnostics	Please select a responsibility.		
CAPSA AS: St. Dept. Signet VSOI CAPSA BA: AP. Invoice Manager CAPSA PA: GL Engliv	A man have a marker		www.www.



Setting up a Top Ten List from the Navigator

To save searching for frequently used tasks, you can set up a Top Ten list for each responsibility you have.

To add a task to the *Top Ten List*, highlight the task and click on the forward arrow button.

To remove a task, highlight the relevant line and click on the back arrow button

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NB: The name of some of the tasks that you select to display in your *Top Ten List* may change but it's the same task.

Double click on the task to open it. The tasks open in what is known as a form in UFS.

The *Top Ten List* is similar to *Favorites* as it contains shortcuts through to tasks that you carry out on a regular basis. The main difference is that with the *Top Ten List* you must select the responsibility in the navigator for the list to appear.

Ø	Navigator	- U.F.S AG AP CENTRAL ENQUIR				
ĺ	Function	ns Documents	-			
	Invoices	c				
	_					.
	-	Invoices			Top Ten List	
		Invoice Batches			1. View Invoices Summary	
		Invoices			2. View Invoice Batches Summary	
		Quick Invoices			3. View Suppliers	
		Invoice Overview	2		4. Profile User Values	
		Withheld Amounts	1			•
	1	EDMS Invoice Report	1	-		

On the E-Business Suite Homepage, *Favorites* can be from a mix of responsibilities and allow you to bypass the navigator and take you straight into the task.

Favorites	
	Personalize
Define (Security : User)	
Enter (Journals)	
Expenditure Enquiry (Expenditures)	
Award Status (CAPSA RGCS GRANTS ENQUIRY)	
Invoice Batches (Invoices)	
Invoices (Invoices)	
Suppliers (U.F.S AG AP CENTRAL ENQUIRY)	



Personal Profiles

Personal profiles allow you to change defaults within the system. They are user specific and contain information entered by the user who has signed onto the system. You may find them useful to set up a default printer or an account code for iProcurement ordering.

Navigator	- CAPSA AG: AP Invoice Manager			
Functio	Documents			
Person	A Profile Recurring Invoices Recurring Payment Calendar Funds Check Results Enquiry Accrual Write-Off Suppliers Employee Address Secondary Invoice Approval Construction Industry Tax Other Distribution Sets Personal Profile Buyers Work Centre	*	Top Ten List 1. Invoice Batches 2. Invoices 3. View Suppliers 4. Profile User Values	
		 	<u>O</u> pen	

- 1. Navigate to **Personal Profile** either from your task list on E Business Suite Home page or from Navigator once you have selected a task. A blank screen will appear.
- 2. Press F11 on your keyboard or using the view menu select *Query by Example then Enter* to put the screen into query mode, the first line should go blue.

Profile Name Default Value User Value Image: Strategy of the strategy o	1



Setting default GL account codes and contact details to print out on orders

Enter CAPSA% in the Profile Name field and then press **ctrl + F11** or using View from the menu, select **Query by Example then Run**.

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		Sum	mary/Det	tail		ount i	<u>w</u> a	tchir	ig Re	ecoro			
		<u>R</u> equ	ests										

This displays the options where you can default in the following fields:

- a. CAPSA GL... profile names (five in all) can be changed by clicking in the User Value field for the relevant profile name. Enter your own relevant account code segments. Useful within iProcurement.
- b. **CAPSA PO...** profile names relate specifically to Purchase Orders. You can enter your fax and telephone number by clicking in the user value and these will print at the top of your purchase order.

Profile Name	Default Value	User Value
CAPSA GL Cost Centre Default		
CAPSA GL Department Default		
CAPSA GL Entity Default	U	
CAPSA GL Source of Funds Defa		
CAPSA PO Email Address		john.smith@cam.ac.uk
CAPSA PO Fax No.		01223456789
CAPSA PO Queries		
CAPSA PO Telephone No.		01223765432
CAPSA WPM Delivery Finance C	U.AG.AGBA.GAAA.LAAA.C	
CAPSA: Allow WF Creation of PO	Yes	



Default printer and number of copies

Press **F11** on your keyboard to put the screen back into query mode and this time type in CONCURRENT% and press **ctrl F11** and you can default in the following.

ersonal Profile Values			
Profile Name	Default Value	User Value	
Concurrent: Allow Debugging	Yes		<u>A</u>
Concurrent: Business Intelligence	No		
Concurrent: Client Filename Chara			3
Concurrent: Enable Request Subn	Yes		
Concurrent: Force Local Output F	Yes		
Concurrent: Show Requests Sumr	Yes		
Concurrent: UTL_FILE flush delay			
Concurrent:Attach URL	Yes		
Concurrent:Collect Request Statist			
Concurrent:Conflicts Domain			
Concurrent:Date Parameter Incre	Start Date		
Concurrent:Hold Requests	No		

Concurrent Report Copies profile name allows you to change the number of copies set to come off the printer, without having to keep changing it in the request screens.

- a. Click into the User Value field
- b. Enter 1 in the field if you mostly raise purchase orders or sales invoices. If you are running a lot of reports then enter 0 in field so that it prints to screen first for you to view and then you can reprint if required.
- c. Save

If you use the system mostly for running reports / checking account balances then it is advisable to leave the Concurrent:Report Copies profile as zero. This is because some reports consist of many pages and you may want to check their suitability before you print.

Press F11 on your keyboard to put the screen back into query mode and this time type in PRINTER % and press ctrl F11.

Printer profile name allows you to set your own printer name in the User Value column by clicking in the user value field and use the list of values to select required printer. Not all printers are compatible with UFS so you may need to check with your computer office

Personal Profile Values			
Profile Name	Default Value	Lisor Value	
Printer			

Save your changes to update your personal profile.