

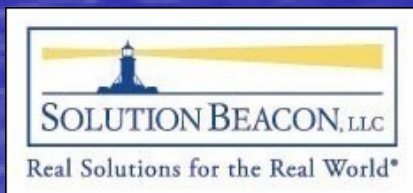


Oracle E-Business Suite Release 11i Workflow Functional Overview

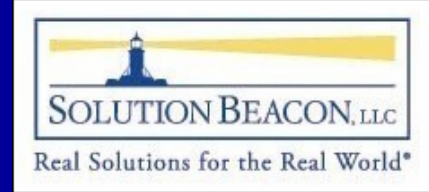
Susan Behn
Karen Brownfield

Release 11i/Workshops
Dallas, TX • Santa Clara, CA
Cincinnati, OH • Denver, CO • Atlanta, GA
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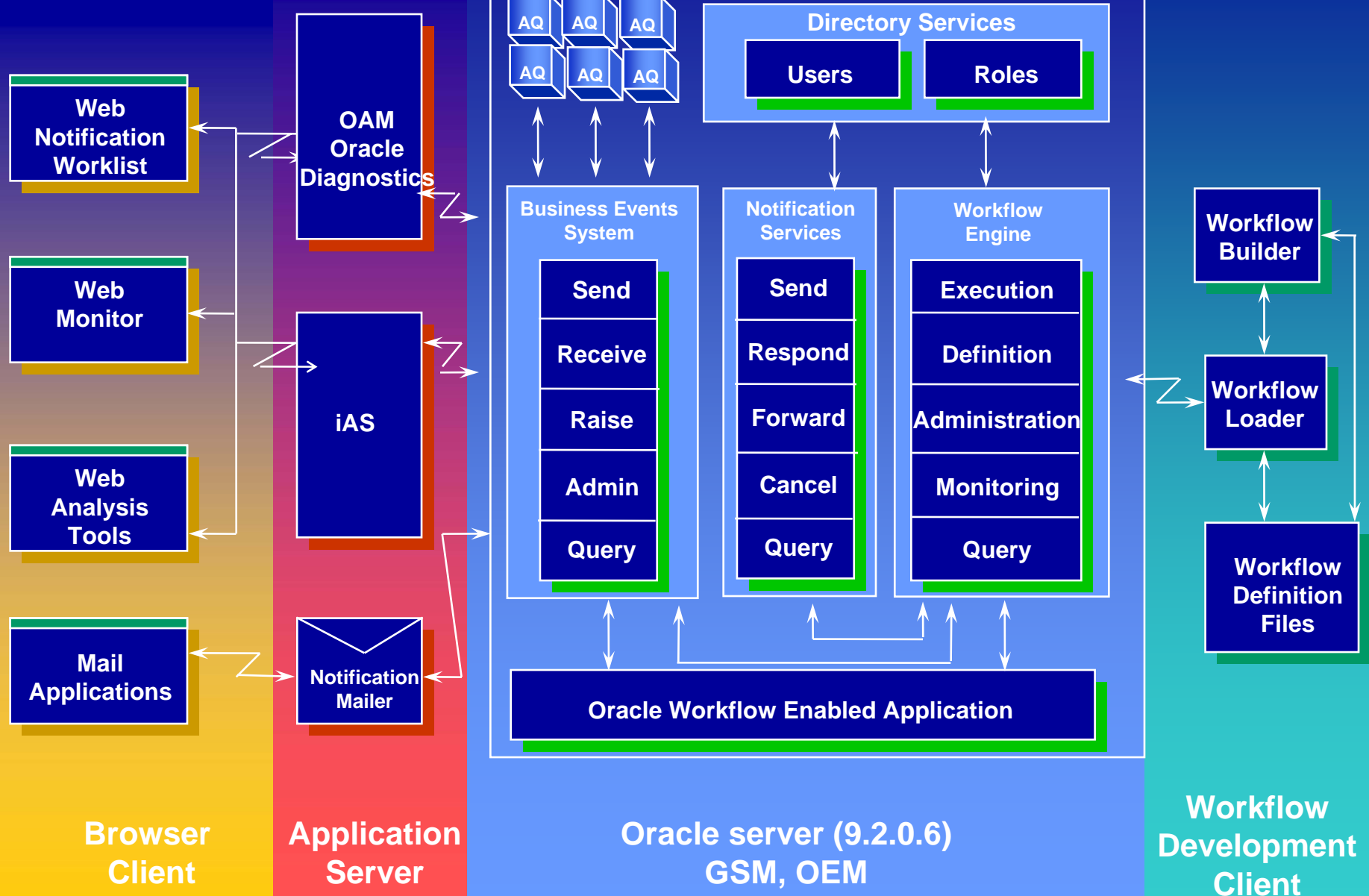
Agenda



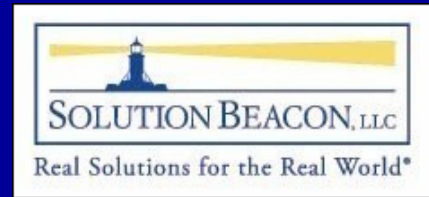
- ◆ Workflow Overview
 - Workflow Components
 - How It Works
- ◆ Workflow Types
- ◆ Workflow User Menus
- ◆ Notifications / Worklists
- ◆ Workflow Monitor
- ◆ Routing / Notification / Vacation Rules
- ◆ Common Configuration Issues



Workflow Components



Workflow Components

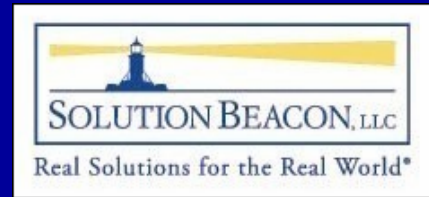


◆ Developer Components

- Builder – Graphical tool to define/modify workflows
- Loader – import/export workflows from builder to database
 - ◆ Version Tracking – workflows complete in existing version



Workflow Components

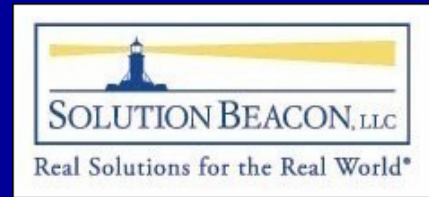


◆ Database Components

- Advanced Queuing (AQ) – Sends messages between systems
- Business Event System – Utilizes AQ to execute activities at the appropriate time based on events
- Workflow Engine – controls processes
- Directory Services – users, responsibilities, groups and other roles to receive notification



Workflow Components



◆ User and Administrator Components

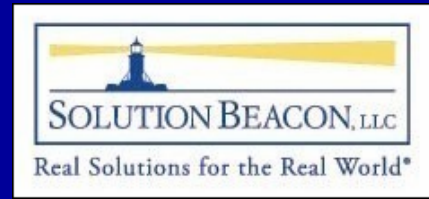
- Notifications – notify/prompt users
 - ◆ Notification Summary
 - ◆ Email Notifications
- Status Monitor
- Worklist

◆ Setup and Monitoring Tools

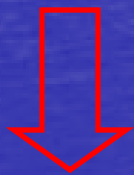
- Oracle Applications Manager (OAM)
 - ◆ Setup and health checks
- Workflow → Administrator Home Page
 - ◆ Setup and monitor specific events and activities



How it Works



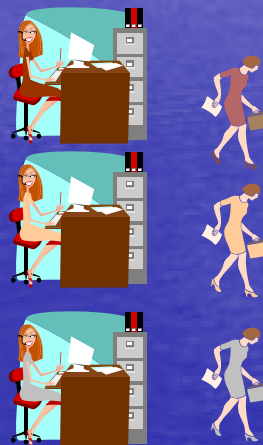
Event



Subscription

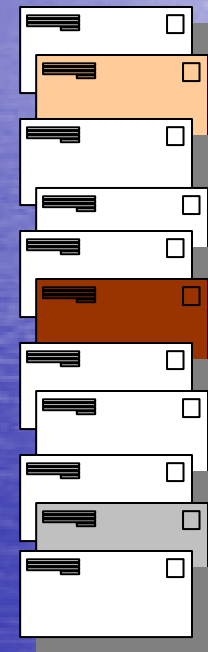
- Personnel Files (workflow)
- Uniform order (PO)
- Employee survey (deferred email)

Agent



Listener

Queues



Workflow Integration with E-Business



- ◆ Business events contain subscriptions which create messages to determine what happens next
 - Multiple subscriptions may occur at different times
 - *Subscriptions* launch **workflows**, execute code, send or receive messages to/from partners, send notifications
- ◆ Business events examples
 - Update a profile option to assign a printer to a user
 - ◆ Oracle.apps.fnd.profile.value.update
 - Initiate Invoice Approval
 - ◆ oracle.apps.ap.event.invoice.approval
 - Hire an employee
 - Enter a new supplier



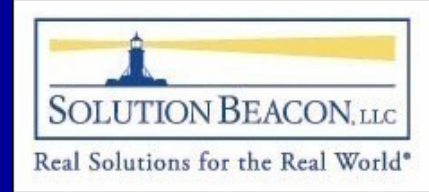
How it Works



- ◆ Each message (*subscription*) is sent to an *agent*
- ◆ *Agents* (point of communication) are assigned to a queue and translate the message into the format required by the queue (XML, Text, SQL, Java)
- ◆ *Agent Listeners* wake up and listen for messages from *agents*; the listener passes the message from the *agent* to the *queue*
- ◆ *Queues* are database tables; the Advanced Queuing (AQ) system processes these queues based on dates



Workflow Types



◆ Synchronous

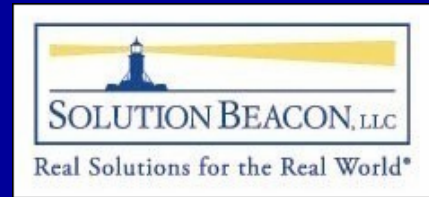
- Process immediately
- Contain only activities that can be executed immediately
- Execute start to finish without interruption
- Return control to calling application when finished
- Write to run-time tables (can view results in monitor)

◆ Examples

- Calculate price on an order
- Create a user name in user management



Workflow Types



◆ Forced synchronous

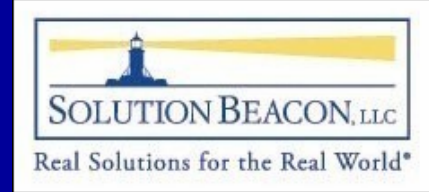
- Processes immediately
- Contain only activities that can be executed immediately
- Workflow Persistence is set to Synchronous in workflow builder
- Execute start to finish without interruption
- Return control to calling application when finished
- Do not write to run-time tables, no audit trail
- ItemKey = #SYNCH

◆ Example

- Account Generators



Workflow Types



◆ Asynchronous

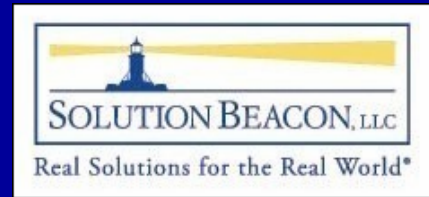
- Contain activities that interrupt the flow
- Return control to calling application when first interrupt activity is encountered
- Write to run-time tables (can view results in monitor)
- Deferred processes processed by Workflow Background Engine

◆ Examples

- Receipt Confirmation
- AP Invoice Approval



New Menus



◆ Workflow User Web (New)

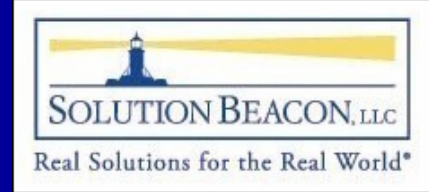
- Seeded

- ◆ Self Service Workflow

- Home
 - Status Monitor
 - Notifications – same as Advanced Worklist



New Menus



◆ Workflow User Web Applications

- Seeded

- ◆ Advanced Worklist

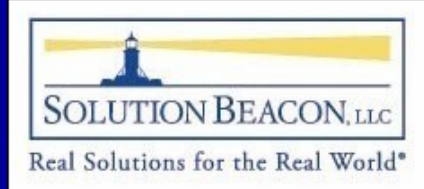
- ◆ Self Service Workflow

- Home
 - Status Monitor
 - Notifications – same as Advanced Worklist

- Optionally add the Personal Worklist function to menus



Self Service Workflow – Home



- ◆ Top 5 notifications due now
- ◆ Vacation Rules
- ◆ Worklist Access
- ◆ Status of workflows you own

ORACLE [Preferences](#) [Help](#) [Close Window](#)

Home | Status Monitor | Notifications

Welcome SBEHN
to Oracle Workflow

Notifications

Below is a list of your most important notifications. Select the subject to respond or select "Full List" to see all your notifications. [Full List](#)

[Switch User](#)

Type	Subject	Sent	Due
Service Messages	Message for Testing Notification Mailer	25-Apr-2006	
Service Messages	Message for Testing Notification Mailer	25-Apr-2006	
Service Messages	Message for Testing Notification Mailer	06-Apr-2006	
System: Error	Error in Workflow APEXP/16069	13-Feb-2006	

TIP [Vacation Rules](#) - Redirect or auto-respond to notifications.
 TIP [Worklist Access](#) - Specify which users can view and act upon your notifications.

Status at a Glance

Your most recent workflows are shown below. Select a workflow link to view its notification history, or select "Full List" to check the status of all your workflows. [Full List](#)

	Status	Workflow Type	Workflow	Started	Completed
(No workflows found)					



Self Service Workflow – Home



- ◆ Switch User
 - Only available if another user has granted you Worklist Access
- ◆ Tabs
 - Status Monitor
 - Notifications
 - ◆ Same as worklist

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Home Status Monitor Notifications

Welcome SBEHN
to Oracle Workflow

Notifications

Below is a list of your most important notifications. Select the subject to respond or select "Full List" to see all your notifications. [Full List](#)

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Service Messages	Message for Testing Notification Mailer	06-Apr-2006	
System: Error	Error in Workflow APEXP/16069	13-Feb-2006	

TIP [Vacation Rules](#) - Redirect or auto-respond to notifications.
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Status at a Glance

Your most recent workflows are shown below. Select a workflow link to view its notification history, or select "Full List" to check the status of all your workflows. [Full List](#)

Status	Workflow Type	Workflow	Started	Completed
(No workflows found)				



Notifications



◆ Automatically Notify Users

- Alert users of exception conditions
- Respond to events that require human judgment

◆ Send Notifications to individuals or roles

- Change the participants in a role without changing the process

◆ Automatic Notification Forwarding

- When user is unavailable (vacation, sick leave)
- When user wants to transfer or delegate a task



Notifications

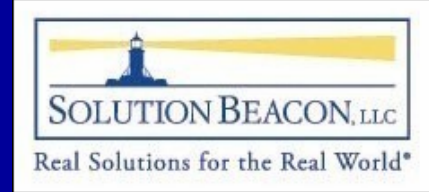


◆ Recipient can:

- Respond (or close if no action required)
- Forward
 - ◆ Owner or original recipient not updated
 - ◆ If forwarded via email, workflow can't track, but records eventually record responder's e-mail and respond message attributes
- Transfer Ownership
 - ◆ Cannot be done via email viewing of notification
 - ◆ Cannot Transfer AP Approval Management notifications
 - MetaLink note 336226.1
 - Oracle has enhancement request for AME - 3298110



Profile Options



◆ WF: Notification Reassign Mode

- Delegate – cannot choose Re-assign
- Transfer – cannot choose Delegate – whether hierarchy changes depends on workflow involved
- Reassign – can choose Delegate or Transfer

◆ Vacation Rules: Allow All

- Disabled – cannot specify 'All' for Vacation Rules
- Enabled – can specify 'All' for Vacation Rules



Self-Service Notifications



Home > Worklist >
Expense W16070 (60.00 EUR)

[Problem Fixed](#)
[Return to Preparer](#)
[Reassign](#)
[Request Information](#)

To: SYSADMIN SYSADMIN
 Sent: 11-Feb-2005 13:00:29
 Due: 14-Feb-2005 13:00:29
 ID: 841325

Expense Report for	Boursin, Miss Elisabeth
Cost Center	301
Purpose	Reunion mensuelle Projet
Expense Report Total	60.00 EUR
Notes	The system could not find an approver for the reason listed below.
Error Message	A supervisor for the employee seeking reimbursement for this expense report cannot be identified. Please go to the Enter Person window and assign a supervisor to this employee.
Instructions	Correct this error and click Problem Fixed to run the Find Approver procedure again. If the errors can be resolved by the preparer, please provide specific instructions how to fix the problem in the Notes section and click Return to Preparer to reset the Expense Report to a Saved status.

Cash and Other Expenses: Business Expenses

Line Number	Date	Expense Type	Amount	Justification
1	12-JUN-2003	Voiture	50.00	Réunion mensuelle sur site
2	13-AUG-2003	Restaurant	10.00	Réunion mensuelle sur site
Total			60.00	

Action History

Num	Action Date	Action	From	To	Details
1	08-FEB-2005 12:50:23	Cancel	SYSADMIN SYSADMIN	Workflow System	
2	11-FEB-2005 13:00:29	Cancel	SYSADMIN SYSADMIN	Workflow System	

Response

Note:

[Return to Worklist](#)
 Display next notification after my response

[Problem Fixed](#)
[Return to Preparer](#)
[Reassign](#)
[Request Information](#)

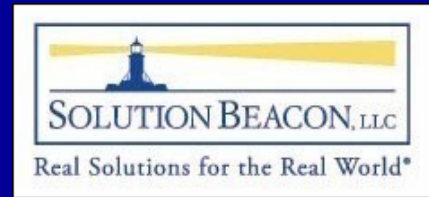
[Close Window](#) | [Preferences](#) | [Help](#)

Extended HTML message formats

Open next Notification without Returning to worklist



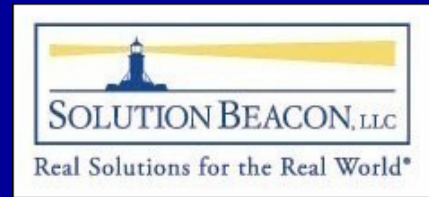
Electronic Signatures



- ◆ Can't respond through e-mail
 - Informs user electronic signature is required
 - Includes Link to go to Notification Page
 - Must log in as intended recipient (not delegated/switched user)
- ◆ 'Purge Obsolete Workflow Runtime Data' has new profile option, 'Signed Notifications' that allows signed notifications to be retained (set value to Y)



Electronic Signatures



◆ Password-based

- When replying to notification
 - ◆ Confirmation page appears
 - ◆ Enter username/password

◆ Certificate-based (11.5.10 only)

- Requires valid X.509 certificate issued by a certificate authority
 - ◆ See: Loading Certificates for Digital Signatures, *Oracle Workflow Administrator's Guide*.
- When replying to notification
 - ◆ Confirmation page appears
 - ◆ Choose Sign button
 - ◆ Use Web browser to enter your X.509 certificate



Worklist



◆ Worklist on Home Page

Worklist Full List

Switch User

Subject	Sent ▾	Type	Due
Message for Testing Notification Mailer	25-Apr-2006	Service Messages	
Message for Testing Notification Mailer	25-Apr-2006	Service Messages	
Message for Testing Notification Mailer	06-Apr-2006	Service Messages	
Error in Workflow APEXP/16069	13-Feb-2006	System: Error	

✓ TIP [Vacation Rules](#) - Redirect or auto-respond to notifications.
✓ TIP [Worklist Access](#) - Specify which users can view and act upon your notifications.



Advanced Worklist



ORACLE Workflow

[Home](#) [Logout](#) [Preferences](#) [Help](#) [Personalize Page](#)

Worklist for Behn, Susan

Worklist

View

Select Notifications: |

[Select All](#) | [Select None](#)

Select	Type	Subject	Sent	Due
<input type="checkbox"/>	Service Messages	Message for Testing Notification Mailer	25-Apr-2006	
<input type="checkbox"/>	Service Messages	Message for Testing Notification Mailer	25-Apr-2006	
<input type="checkbox"/>	Service Messages	Message for Testing Notification Mailer	06-Apr-2006	
<input type="checkbox"/>	System: Error	Error in Workflow APEXP/16069	13-Feb-2006	

TIP [Vacation Rules](#) - Redirect or auto-respond to notifications.

TIP [Worklist Access](#) - Specify which users can view and act upon your notifications.

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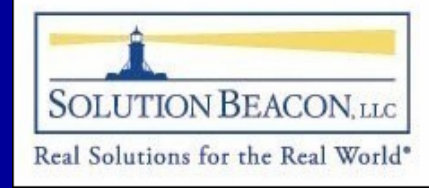
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Personal Worklist



- ◆ Not included on seeded menus
 - Add function 'Personal Worklist' to menu
- ◆ Includes *Personalize* button

ORACLE Workflow User Web Applications

Home Logout Preferences Help Personalize Page

Worklist for Behn, Susan

Simple Search

View open Notifications Go Personalize

Select Notifications: Open Reassign Switch User

Select All | Select None

Select	Subject	From	Sent	Type	Status	Due	Type Internal Name
<input type="checkbox"/>	Message for Testing Notification Mailer		25-Apr-2006	Service Messages	Open		CS_MSGS
<input type="checkbox"/>	Message for Testing Notification Mailer		25-Apr-2006	Service Messages	Open		CS_MSGS
<input type="checkbox"/>	Message for Testing Notification Mailer		25-Apr-2006	Service Messages	Closed		CS_MSGS
<input type="checkbox"/>	Message for Testing Notification Mailer		06-Apr-2006	Service Messages	Closed		CS_MSGS
<input type="checkbox"/>	Message for Testing Notification Mailer		06-Apr-2006	Service Messages	Closed		CS_MSGS
<input type="checkbox"/>	Message for Testing Notification Mailer		06-Apr-2006	Service Messages	Open		CS_MSGS
<input type="checkbox"/>	Error in Workflow APEXP/16069	SYSADMIN	13-Feb-2006	System: Error	Open		WFERROR

✓ TIP Vacation Rules - Redirect or auto-respond to notifications.
✓ TIP Worklist Access - Specify which users can view and act upon your notifications.

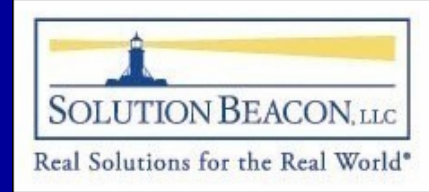
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Worklist Access



- ◆ Shows existing grantees
- ◆ Click Grant Worklist Access to add
- ◆ Behaves as delegated notifications – consider auditing impact

ORACLE Workflow User Web Applications [Home](#)

Worklist Access

The following users have access to view and act upon your worklist

[Grant Worklist Access](#)

Name	Description	Start Date	End Date	Status	Update	Delete
No results found.						

[Return to Worklist](#)

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Worklist Access



◆ Choose Name

- Leave 'All Employees and Users' to avoid getting customer contacts, etc
- End date optional

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[Worklist Access](#) >

Grant Worklist Access

Grant another user access to view and act upon your notifications via the Worklist. [Cancel](#) [Apply](#)

* Indicates required field

* Name	All Employees and Users <input type="text" value="TSHARPE"/>	
Description	<input type="text"/>	
* Start Date	<input type="text" value="28-Dec-2006"/>	
	(example: 28-Dec-2006)	
End Date	<input type="text"/>	

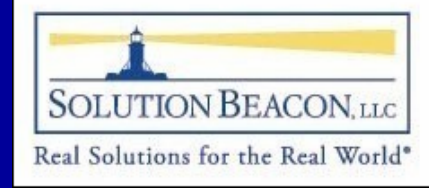
[Cancel](#) [Apply](#)

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Personal Worklist



- ◆ View pulldown – choose view (Open, FYI, etc)
- ◆ Simple Search (has Link to Advanced Search)
- ◆ Personalize views – add fields, filter, resort, etc

ORACLE Workflow User Web Applications

Home Logout Preferences Help Personalize Page

Worklist for Behn, Susan

View: open Notifications [Go] [Personalize] [Simple Search]

Select Notifications: [Open] [Reassign] [Switch User]

Select All | Select None

Select	Subject	From	Sent	Type	Status	Due	Type Internal Name
<input type="checkbox"/>	Message for Testing Notification Mailer		25-Apr-2006	Service Messages	Open		CS_MSGS
<input type="checkbox"/>	Message for Testing Notification Mailer		25-Apr-2006	Service Messages	Open		CS_MSGS
<input type="checkbox"/>	Message for Testing Notification Mailer		25-Apr-2006	Service Messages	Closed		CS_MSGS
<input type="checkbox"/>	Message for Testing Notification Mailer		06-Apr-2006	Service Messages	Closed		CS_MSGS
<input type="checkbox"/>	Message for Testing Notification Mailer		06-Apr-2006	Service Messages	Closed		CS_MSGS
<input type="checkbox"/>	Message for Testing Notification Mailer		06-Apr-2006	Service Messages	Open		CS_MSGS
<input type="checkbox"/>	Error in Workflow APEXP/16069	SYSADMIN	13-Feb-2006	System: Error	Open		WFERROR

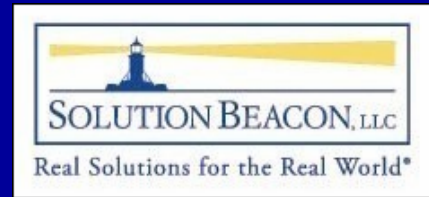
TIP Vacation Rules - Redirect or auto-respond to notifications.
 TIP Worklist Access - Specify which users can view and act upon your notifications.

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Personalize Personal Worklist



- ◆ To Duplicate View and customize, click 'Duplicate'
- ◆ To Customize seeded view, click 'Create View'

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Personalize Views

Below is a list of all pre-configured and/or personalized views applicable to "Customizable and searchable worklist" table on the previous screen. Pre-configured views are read only. Duplicate a pre-configured view to see its definition or to create a variation of the same.

Select View: |

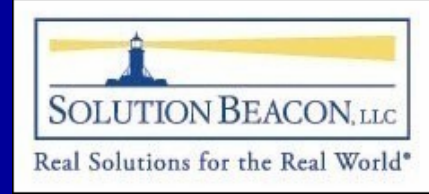
Select View Name	Description	Display View	Default	Update	Delete
<input checked="" type="radio"/> open Notifications		Yes <input type="button" value="v"/>	Set by User		
<input type="radio"/> All Notifications		Yes			
<input type="radio"/> FYI Notifications		Yes			
<input type="radio"/> Notifications From Me		Yes			
<input type="radio"/> Open Notifications		Yes			
<input type="radio"/> To Do Notifications		Yes			

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Customize Personal Worklist



- ◆ Select Columns
- ◆ Advanced Settings
 - Rename Columns
- ◆ Change Sort Sequence
- ◆ Filter Messages

Create View

Below is a list of attributes that can be edited to change the view and/or filter the data that is displayed in your table. Cancel Revert Apply and View Results Apply

* Indicates required field

General Properties

* View Name

Number of Rows Displayed Set as Default

Description

Column Properties

Update the appropriate column attributes as desired. Rename Columns / Totaling

Columns Shown and Column Order

Available Columns

- To
- Information Requested From
- Closed
- Priority
- Notification ID
- From Me
- Message Name
- Type Internal Name
- Text_Attribute1
- Text_Attribute2
- Text_Attribute3
- Text_Attribute4
- Text_Attribute5
- Text_Attribute6
- Text_Attribute7
- Text_Attribute8
- Text_Attribute9
- Text_Attribute10
- Form_Attribute1
- Form_Attribute2

Columns Displayed

- Subject
- From
- Sent
- Type
- Status
- Due

TIP Columns with totaling capabilities shown can only display as the end column of the table.

Sort Settings

	Column Name	Sort Order
First Sort	Sent	descending
Second Sort	Subject	ascending
Third Sort	From	ascending

Search Query to Filter Data in your Table

Specify parameters and values to filter the data that is displayed in your table.

Advanced Search

Search results where each must contain all values entered.
 Search results where each may contain any value entered.

Subject

From

Message Attribute

Sent

Cancel Revert Apply and View Results Apply



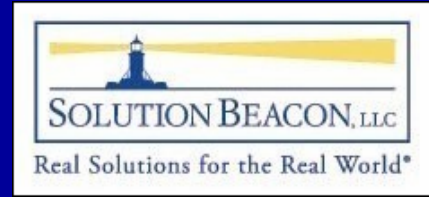
Enhanced Worklist Functions



- ◆ Link attachments (images, spreadsheets, video) to notifications
 - Cannot be included in email
 - Adds View link to Notification header
 - Only viewable in new OAF worklist pages



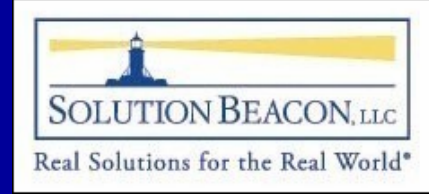
Enhanced Notification Detail Page (non-email, OA)



- ◆ Response buttons top/bottom page
- ◆ Display 'Next Notification' After 'My Response' check box
- ◆ 'Return to Worklist' link



Self Service Workflow Status Monitor



- ◆ Monitor for workflows you own
 - However, many workflow including invoices and receipts require a customization to set the owner

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[Home](#) [Status Monitor](#) [Notifications](#)

Status Monitor >

Monitor Search

Workflows

Search
Specify search criteria and select "Go" to find workflows.

* Status

[▶ Show More Search Options](#)

Results: Workflows

To see all notifications sent by the workflow, select "Notification History." Select "Participant Responses" to view comments and other data collected for response-required notifications.

TIP Workflow histories are periodically purged from the system and may no longer be available for review.

Select Workflow and View...

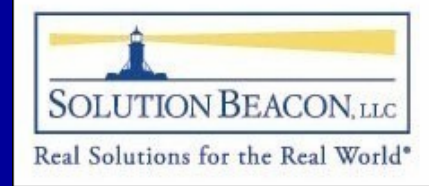
Select	Status	Workflow Type	Workflow	Started	Completed
<input type="radio"/> <input checked="" type="radio"/>	Error	iStore Alerts Workflow	ORDCONF-081903132520-5122	19-Aug-2003 13:25:20	

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Workflow Monitor



◆ Click Participant Responses to view notification history

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[Home](#) [Status Monitor](#) [Notifications](#)

[Status Monitor](#) > [Monitor Search](#) >

Monitor Responses

Participant Responses: ORDCONF-081903132520-5122

Workflow Type **iStore Alerts Workflow** Started **19-Aug-2003 13:25:20**
Status **Error** Completed

[Notification Responses](#)

TIP Only completed, response-required notifications are shown below. If you're interested in information-only notifications, or unanswered response-required notifications, see the complete Activity History.

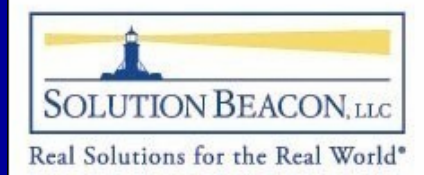
Notification Subject	Respondent	Comment	Response	View Response Details
(No notifications found)				

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Workflow Monitor



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[Status Monitor](#) > [Monitor Search](#) >

Monitor Diagram

Status Diagram: ORDCONF-081903132520-5122

Workflow Type: iStore Alerts Workflow Started: 19-Aug-2003 13:25:20
Status: Error Completed

Current Status

Process To Map Message Templates : IBEALERT,ORDCONF-081903132520-5122 [Zoom In](#) [Zoom Out](#)

```
graph LR; Start((Start)) --> Notify((Notify)); Notify -- Default --> End((End));
```

Definition | **Usage** | Status | Notification

Current Location : Process To Map Message Templates/Process To Map Message Templates
Item Type : iStore Alerts Workflow
Activity Name : Process To Map Message Templates
Description : Process To Map Message Templates
Activity Type : Process
Result Type :

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Workflow Monitor



- ◆ Click Node to see info about node
- ◆ Status tab shows error message
- ◆ Notification tab says who it went to
- ◆ Usage tab gives timeout info
- ◆ Can't see attributes

Status Monitor > Monitor Search >

Monitor Diagram

Status Diagram: ORDCONF-081903132520-5122

Workflow Type	iStore Alerts Workflow	Started	19-Aug-2003 13:25:20
Status	Error	Completed	

Current Status

Process To Map Message Templates : IBEALERT,ORDCONF-081903132520-5122

```
graph LR; Start((Start)) --> Notify[Notify]; Notify -- Default --> End((End))
```

Definition Usage **Status** Notification

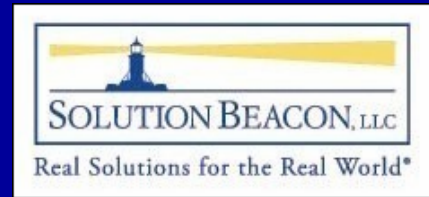
Status :	Error
Result :	Exception
Begin Date :	19-AUG-2003 13:25:20
End Date :	
Due Date :	
Assigned User :	
Error Message :	ORA-01403: no data found ORA-01403: n

Home | Status Monitor | Notifications

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Going on Vacation? Set up Routing / Vacation Rules

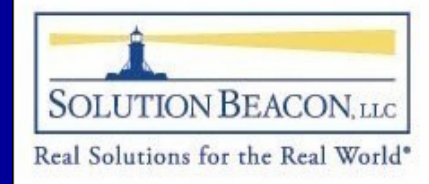


◆ Routing / Vacation Rules

- Available from all worklist screens
- Can only create rules for <All> or itemtypes currently in progress
- OWF rollup 2 or 11/10
 - ◆ Lookup Type – WF: Vacation Rule Item Types
 - ◆ Profile option – Vacation Rules: Allow All



Set up a Vacation Rule



- ◆ First query existing rules
- ◆ Click Create Rule to add rule

ORACLE Workflow

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[Worklist](#) >

Vacation Rules

Rule Name	Item Type	Notification	Update	Delete	Status
You have not setup any notification routing rules. Please use the Create Rule button to create a new notification routing rule.					

[Return to Worklist](#)

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Set up a Vacation Rule



- ◆ To create a rule that applies to all notifications, leave <All> highlighted, click Next

ORACLE Workflow

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Item Type Notification Rule Response

Vacation Rule: Item Type

Select the type of notification that will activate this rule.

Item Type --All--

Return to Vacation Rule

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Step 1 of 3 Next

PA Mass Assignment Transaction Workflow



Set up a Vacation Rule



- ◆ (Optional) Set End Date
- ◆ (Optional) Use Message to explain transfer

ORACLE Workflow [Home](#) [Logout](#) [Preferences](#) [Help](#)

Item Type Notification **Rule Response**

Vacation Rule: Response

Item Type: **All**
Notification: **All**

* Start Date:
(example: 12-Apr-2005)

End Date:
(example: 12-Apr-2005)

Message:

Comments will display with each routed notification

Reassign

Delegate your response
A manager may delegate all expense report approvals to an assistant.

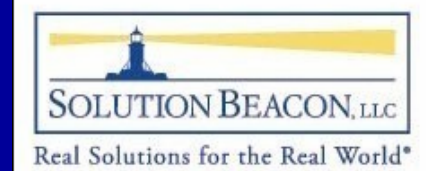
Transfer notification ownership
A manager may transfer a notification for a specific project to the new manager of that project.

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Set up a Vacation Rule



- ◆ Pick Person to reassign to
- ◆ Choose Delegate or Transfer
- ◆ Click Apply

ORACLE Workflow

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Item Type Notification Rule Response

Vacation Rule: Response

Item Type All
Notification All

* Start Date 12-Apr-2005
(example: 12-Apr-2005)

End Date
(example: 12-Apr-2005)

Message

Comments will display with each routed notification

Reassign All Employees and Users SYSADMIN SYSADMIN

Delegate your response
A manager may delegate all expense report approvals to an assistant.

Transfer notification ownership
A manager may transfer a notification for a specific project to the new manager of that project.

Cancel Back Step 3 of 3 Apply

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Set up a Vacation Rule



- ◆ To Create Rule for Specific Workflow Item Type or Specific Notification, Pick the Item Type, press Next.

ORACLE Workflow

Home Logout Preferences Help

Item Type Notification Rule Response

Vacation Rule: Item Type

Select the type of notification that will activate this rule.

Item Type: Expenses

If "--All--" is selected, you will skip to Step 3.

Return to My Rules

Step 1 of 3 Next

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Set up a Vacation Rule



- ◆ For all notifications for the Item Type, select <All>
- ◆ For a specific notification, highlight name, press Next



Set up a Vacation Rule



- ◆ Add comments, auto-answer or choose person to send to, click Apply
 - Note: can override general rules for specific notification

ORACLE Workflow Home Logout Preferences Help

Item Type Notification **Rule Response**

Vacation Rule: Response

Item Type **Expenses**

Notification **Expense ... (...)**

* Start Date

(example: 12-Apr-2005)

End Date

(example: 12-Apr-2005)

Message

Comments will display with each routed notification

Reassign

- Delegate your response
A manager may delegate all expense report approvals to an assistant.
- Transfer notification ownership
A manager may transfer a notification for a specific project to the new manager of that project.

Respond

Note

Action

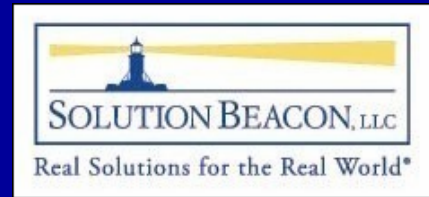
Deliver notifications to me regardless of any general rules

Step 3 of 3

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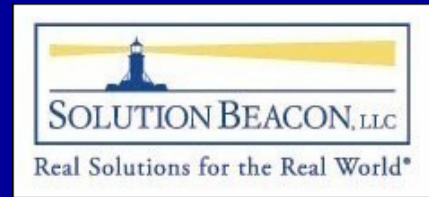
Vacation Rules



- ◆ When rule uses responsibility as the role, notification is sent to all users of that responsibility
- ◆ Once one person responds, notification is removed from all others' in-basket
- ◆ If multiple rules at same level exist, Oracle arbitrarily picks one



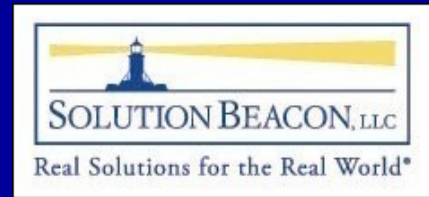
Vacation Rules



- ◆ Multiple rules are processed from most specific to least specific
 - MESSAGE_TYPE = <type> and MESSAGE_NAME = <name>
 - MESSAGE_TYPE = <type> and MESSAGE_NAME is null
 - MESSAGE_TYPE is null and MESSAGE_NAME is null
- ◆ If reassigned, rules are checked for new recipient's list of rules



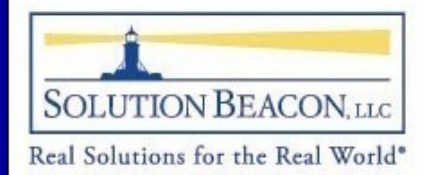
Preferences



- ◆ Users can change the notification type preference via the preferences button
- ◆ Remove preferences button by setting profile option *General Preferences Show Flag* to No
- ◆ Changing global preferences do NOT override preferences set individually



Preferences



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[User](#)
[Preferences](#)
• **General**
• [Access](#)
[Requests](#)

General Preferences

Languages

Current Session Language ⓘ
Default Application Language ⓘ

Accessibility

Accessibility Features ⓘ

Regional

Territory ⓘ
Date Format ⓘ
Timezone ⓘ
Number Format ⓘ
Currency ⓘ
Client Character Encoding ⓘ

Change Password

Known As
Old Password
New Password
Repeat Password

Start Page

Responsibility
Page

Notifications

Email Style ⓘ
Notifications will be sent in your current default language, American English.

[Home](#) | [Logout](#) | [Preferences](#) | [Help](#) | [Personalize Page](#)

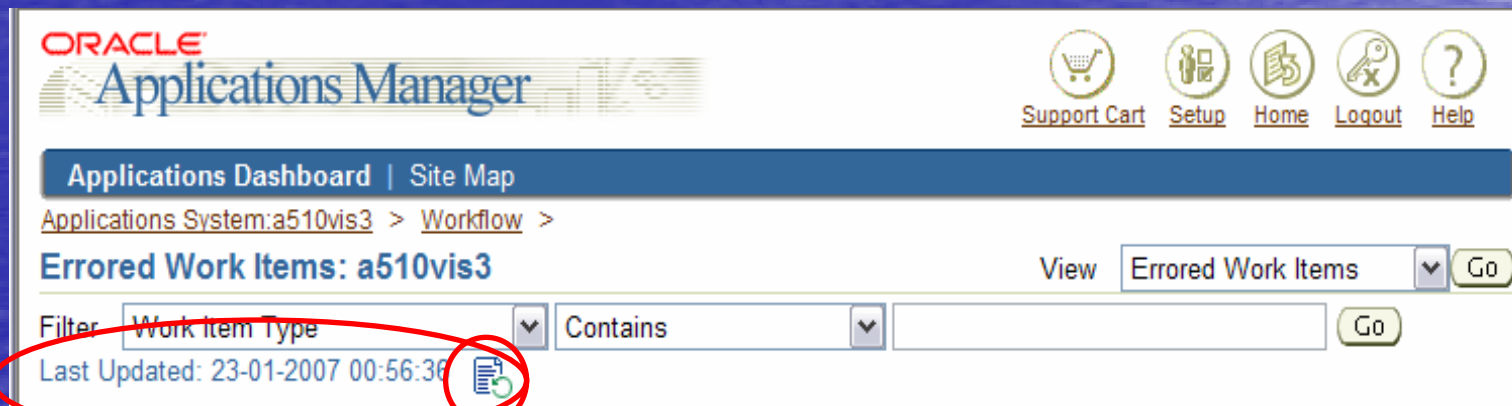
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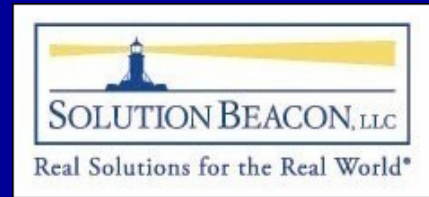
Things to watch for



- ◆ With ATG_PF.H RUP4, OAM forms do not perform new queries (unless refresh button pressed)
 - Ensure following programs are scheduled
 - ◆ Workflow Agent Activity Statistics concurrent Program
 - ◆ Workflow Mailer Statistics Concurrent Program
 - ◆ Workflow Work items Statistics Concurrent Program



Things to watch for



◆ Cloning

- All components are updated
 - ◆ No references to source database
- Notification Mailer
 - ◆ Turned off
 - Individual preferences need to be updated
 - ◆ Test Address – ATG RUP3 changes configuration steps

◆ Notorious Business Events

- Oracle.apps.ar.hz.DQM.realtimesync
 - ◆ MetaLink note 317454.1
- Oracle.apps.ar.transaction.%
 - ◆ MetaLink notes 364585.1 and 301907.1



Things to watch for



- ◆ 11/10 – MUST be on ATG_PF.H RUP3 or RUP4
 - Corruption in Directory sync tables
 - Should periodically run
 - ◆ Workflow Directory Services User/Role Validation
 - ◆ Update Person Names
 - Followed immediately by Workflow Directory Sync



Things to watch for



◆ Workflows MUST be configured

- Timeouts

- ◆ Example – REQAPPRV

- Timeout not defined

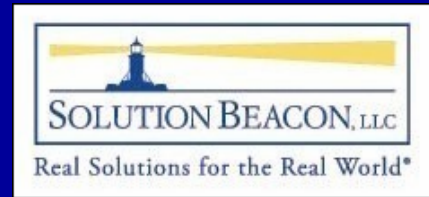
The screenshot shows a workflow diagram with a node labeled 'Approve Requisition Notification'. A dialog box titled 'Navigator Control Properties' is open over this node. The dialog has several tabs: Notification, Details, Roles, Access, Node, and Node Attributes. The 'Details' tab is active, showing the following configuration:

- Label: PO_REQ_APPROVE-1
- Start/End: Normal
- Comment: (empty)
- Timeout: Type: No Timeout
- Priority: Type: Default
- Performer: Type: Item Attribute, Value: Approver User Name

Buttons at the bottom of the dialog include OK, Cancel, Apply, and Help. The background workflow diagram shows arrows indicating flow between nodes, with labels like 'Forward', 'Valid', 'No', and 'Er'.



Things to watch for



◆ Workflows MUST be configured

- Performers

- ◆ Example – APEXP

- Who is informed if rejected

The screenshot displays a workflow configuration interface. On the left, a workflow diagram shows a node 'Expense Report Has Been Payables Reviewed' leading to a decision diamond with a question mark. One path from the diamond is labeled 'Yes' and leads to a node 'Inform AP Expense Report They Reviewed Is Mgr Rejected'. Another path is labeled 'No' and leads to a node 'Expense Report Has Been Payables Reviewed'.

Two 'Navigator Control Properties' windows are open. The left window is for the 'Inform AP Expense Report They Reviewed Is Mgr Rejected' node. It shows the following configuration:

- Label: INFORM_AP_MANAGER_REJECTED
- Start/End: Normal
- Comment: (empty)
- Timeout: Type No Timeout
- Priority: Type Default
- Performer: Type Item Attribute, Value AP

The right window is for the 'Expense Report Has Been Payables Reviewed' node. It shows the following configuration:

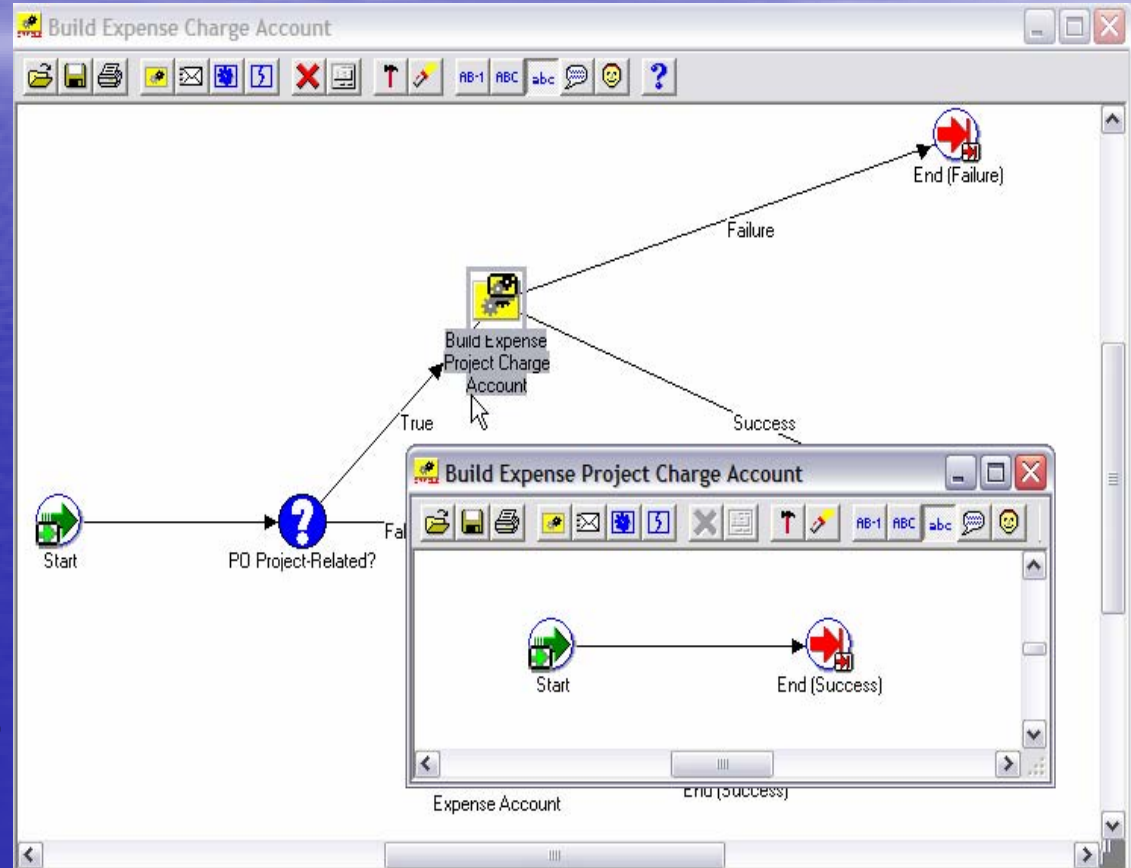
- Item Type: Expenses
- Internal Name: PAYABLES
- Display Name: AP
- Description: Payables
- Type: Role
- Default: Type Constant, Value <None> (circled in red)



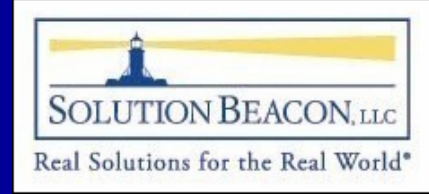
Things to watch for



- ◆ Workflows MUST be configured
 - Account Generators
 - ◆ If Using Projects, MUST customize POWFPOAG, POWFRQAG, PAAPINVW
 - ◆ No Notifications, no deferred activities



Things to watch for

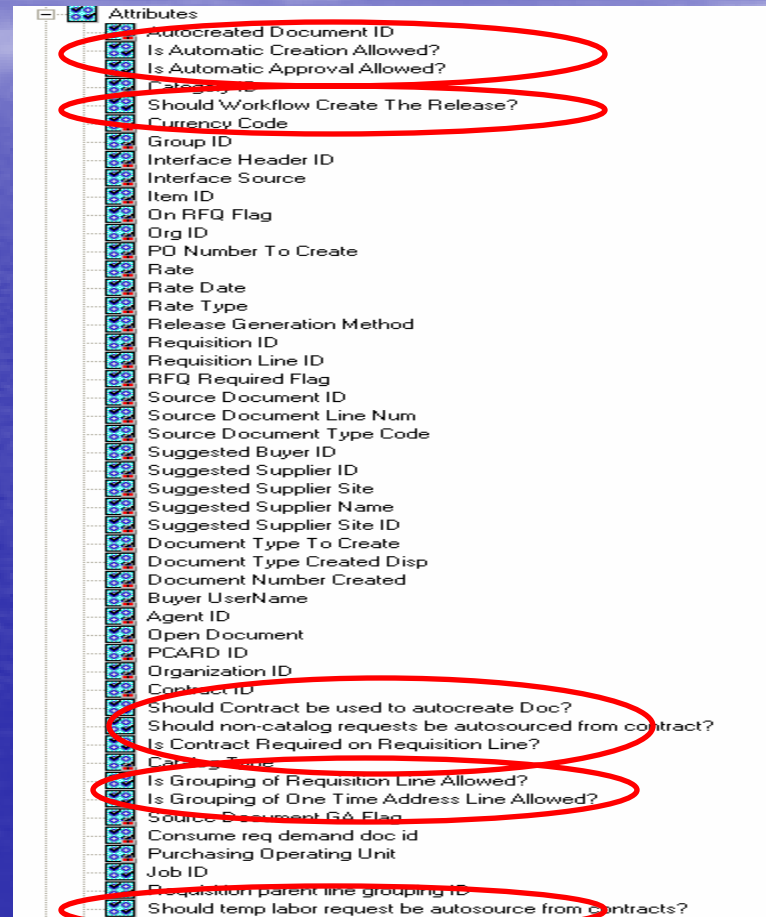


◆ Workflows MUST be configured

● Attributes

◆ Example – CREATEPO, POERROR

- Auto Create Allowed
- Auto Approval Allowed
- Is contact required



Common Requests



- ◆ Hide 'Request More Information'
 - #HIDE_MOREINFO – set value to Y (not Yes)
- ◆ Hide 'Reassign'
 - #HIDE_REASSIGN – set value to Y (not Yes)
- ◆ Remove Notification History (useful for FYI)
 - #HISTORY – leave value blank

Note: These attributes are for changes to specific workflows. Global changes can often be made using OA Framework personalizations



Things to watch for



- ◆ WFERRORS that are open
 - bde_wf_clean_worklist – MetaLink Note 255048.1
 - POERROR – duplicate script and replace name
- ◆ Patching resetting Workflow Administrator to SYSADMIN
- ◆ Nobody reading notifications to SYSADMIN
 - Worklist Access



Things to watch for



- ◆ Errored workflows that are ignored
 - Use OAM to check counts

ORACLE Applications Manager

Applications Dashboard | Site Map

Applications System: a510vis3 > Workflow >

Errored Work Items: a510vis3 View Errored Work Items Go

Filter Work Item Type Contains Go

Last Updated: 23-01-2007 00:56:36

Select a work item type and ... (View Details) Previous 1-15 of 47 Next 15

Select Work Item Type	Count
<input checked="" type="radio"/> AMS Marketing Approvals	9
<input type="radio"/> AP Invoice	2
<input type="radio"/> AP Procurement Card Employee Verification Workflow	2
<input type="radio"/> Address Change	28
<input type="radio"/> CSM Type 3	1
<input type="radio"/> Compensation Plan Processing	95
<input type="radio"/> Contract Approval	5
<input type="radio"/> Dossier Approval Flow Enhanced	1
<input type="radio"/> Expenses	21
<input type="radio"/> Fund Request Approvals	2
<input type="radio"/> GL AutoAllocation	1
<input type="radio"/> GMS Workflow	3
<input type="radio"/> HR	15
<input type="radio"/> HR BIS Corrective Action	9
<input type="radio"/> IBC - Content Manager Workflow	69

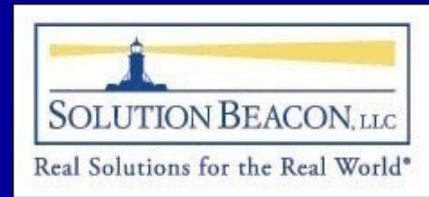
Select a work item type and ... (View Details) Previous 1-15 of 47 Next 15

Support Cart | Setup | Home | Logout | Help

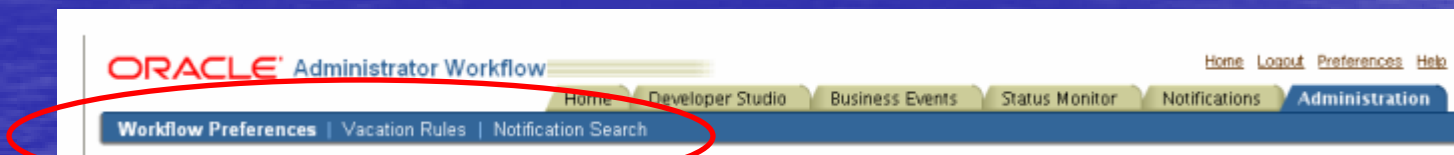
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About Oracle Applications Manager Version 2.3.1



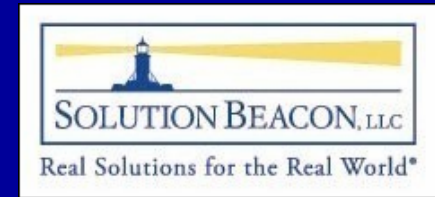
Things to watch for



- ◆ Background Engine recommendation
 - Run Stuck by itself
 - ◆ Frequency – once/day sufficient
- ◆ Worklist on Home Page
 - Can be a performance issue
 - Can be hidden through Personalization
- ◆ Make sure all admin menus are present



Questions and Answers



Thank you!

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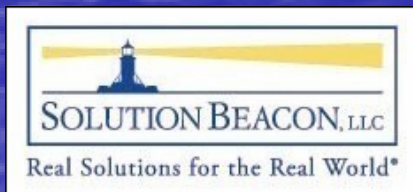
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Bruno Coon, James Morrow, Tim Sharpe and Faun deHenry*

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