

Oracle[®] Workflow

User's Guide

Release 2.6.3

Part No. B10285-02

September 2003

Oracle Workflow User's Guide, Release 2.6.3

Part No. B10285-02

Copyright © 2003 Oracle Corporation. All rights reserved.

Primary Authors: Siu Chang, Clara Jaeckel

Contributors: George Buzsaki, John Cordes, Mark Craig, Mark Fisher, Kevin Hudson, George Kellner, Angela Kung, David Lam, Jin Liu, Kenneth Ma, Steve Mayze, Santhana Natarajan, Tim Roveda, Robin Seiden, Sachin Sharma, Sheryl Sheh, Susan Stratton

The Programs (which include both the software and documentation) contain proprietary information of Oracle Corporation; they are provided under a license agreement containing restrictions on use and disclosure and are also protected by copyright, patent and other intellectual and industrial property laws. Reverse engineering, disassembly or decompilation of the Programs, except to the extent required to obtain interoperability with other independently created software or as specified by law, is prohibited.

The information contained in this document is subject to change without notice. If you find any problems in the documentation, please report them to us in writing. Oracle Corporation does not warrant that this document is error-free. Except as may be expressly permitted in your license agreement for these Programs, no part of these Programs may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without the express written permission of Oracle Corporation.

If the Programs are delivered to the U.S. Government or anyone licensing or using the programs on behalf of the U.S. Government, the following notice is applicable:

Restricted Rights Notice Programs delivered subject to the DOD FAR Supplement are "commercial computer software" and use, duplication, and disclosure of the Programs, including documentation, shall be subject to the licensing restrictions set forth in the applicable Oracle license agreement. Otherwise, Programs delivered subject to the Federal Acquisition Regulations are "restricted computer software" and use, duplication, and disclosure of the Programs shall be subject to the restrictions in FAR 52.227-19, Commercial Computer Software - Restricted Rights (June, 1987). Oracle Corporation, 500 Oracle Parkway, Redwood City, CA 94065.

The Programs are not intended for use in any nuclear, aviation, mass transit, medical, or other inherently dangerous applications. It shall be the licensee's responsibility to take all appropriate fail-safe, backup, redundancy, and other measures to ensure the safe use of such applications if the Programs are used for such purposes, and Oracle disclaims liability for any damages caused by such use of the Programs.

Oracle is a registered trademark, and JInitiator, OracleMetaLink, Oracle Store, PL/SQL, and SQL*Plus are trademarks or registered trademarks of Oracle Corporation. Other names may be trademarks of their respective owners.



Contents

- Preface** v
 - Audience for This Guide vi
 - How To Use This Guide vi
 - Documentation Accessibility vi
 - Other Information Sources vii
 - Online Documentation vii
 - Related User’s Guides viii
 - Guides Related to All Products viii
 - User Guides Related to This Product ix
 - Installation and System Administration x
 - Other Implementation Documentation xii
 - Training and Support xiii
 - Do Not Use Database Tools to Modify Oracle Applications Data xiv
 - About Oracle xv
 - Your Feedback xv

- Chapter 1** **Overview of Oracle Workflow** 1 – 1
 - Overview of Oracle Workflow for Users 1 – 2
 - Major Features and Definitions 1 – 3
 - Workflow Processes 1 – 6

- Chapter 2** **Oracle Workflow Home Page** 2 – 1
 - Accessing the Oracle Workflow Home Page 2 – 2

	Setting User Preferences	2 – 4
	Accessing the Oracle Workflow Self–Service Home Page	2 – 8
Chapter 3	Viewing Notifications and Processing Responses	3 – 1
	Overview of Notification Handling	3 – 2
	Reviewing Notifications via Electronic Mail	3 – 2
	Viewing Notifications from a Web Browser	3 – 17
	Reviewing a Summary of Your Notifications via Electronic Mail	3 – 29
	Defining Rules for Automatic Notification Processing	3 – 30
	Viewing Notifications from a Web Browser for Oracle Applications	3 – 38
	Viewing Notifications from the Personal Worklist	3 – 58
Chapter 4	Monitoring Workflow Processes	4 – 1
	Accessing the Self–Service Monitor	4 – 2
	Viewing Workflows in the Status Monitor	4 – 2
	Viewing Notification History	4 – 5
	Viewing a Status Diagram	4 – 6
	Viewing Participant Responses	4 – 10
	Viewing Error Information for a Workflow	4 – 12
Appendix A	Oracle Workflow User Navigation Paths	A – 1
	Oracle Workflow User Navigation Paths	A – 2
	Glossary	
	Index	



Preface

Audience for This Guide

Welcome to the *Oracle Workflow User's Guide*.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Oracle Workflow

If you have never used Oracle Workflow, Oracle suggests you attend one or more of the Oracle Workflow training classes available through Oracle University.

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

This guide contains the information you need to understand and use Oracle Workflow.

- Chapter 1 provides an overview of Oracle Workflow.
- Chapter 2 describes the Oracle Workflow home page, where users can centrally access all the web-based features of Oracle Workflow.
- Chapter 3 discusses how a user can view and act on a workflow notification.
- Chapter 4 describes how to use the Workflow Monitor to administer or view the status of a workflow process.
- Appendix A describes the navigation paths to Oracle Workflow user web pages in the seeded Oracle Workflow responsibilities for Oracle Applications.

At the end of this guide, we include a glossary of Oracle Workflow terms.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to

facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at <http://www.oracle.com/accessibility/>

Accessibility of Code Examples in Documentation

JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Accessibility of Links to External Web Sites in Documentation

This documentation may contain links to Web sites of other companies or organizations that Oracle does not own or control. Oracle neither evaluates nor makes any representations regarding the accessibility of these Web sites.

Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Workflow.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

If you are using the version of Oracle Workflow embedded in Oracle Applications, note that all Oracle Applications documentation is available online (HTML or PDF).

- **Online Help** – The new features section in the HTML help describes new features in 11*i*. This information is updated for each new release of Oracle Workflow. The new features section also includes information about any features that were not yet available when this guide was printed. For example, if your administrator has installed software from a mini-pack or an

upgrade, this document describes the new features. Online help patches are available on *OracleMetaLink*.

- **11i Features Matrix** – This document lists new features available by patch and identifies any associated new documentation. The new features matrix document is available on *OracleMetaLink*.
- **Readme File** – Refer to the readme file for patches that you have installed to learn about new documentation or documentation patches that you can download.

If you are using the standalone version of Oracle Workflow, note that this guide is available online in HTML format. The HTML documentation is available from a URL provided by your system administrator or from the help icon in the Oracle Workflow web pages.

Related User's Guides

Oracle Workflow is used by other Oracle Applications products to provide embedded workflows. Therefore, if you are using the version of Oracle Workflow embedded in Oracle Applications, you may want to refer to other user's guides when you set up and use Oracle Workflow to learn more about the embedded workflows.

You can read the guides online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at <http://oraclestore.oracle.com>.

Guides Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle Workflow (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

User Guides Related to This Product

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow API Reference

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

Oracle General Ledger User Guide

This guide provides information about journal entry, budgeting, and multi-company accounting and consolidation.

Oracle Purchasing User's Guide

This guide provides information about entering and managing purchase orders and requisitions.

Implementing Oracle Self-Service Human Resources (SSHR)

This guide provides information about setting up the self-service human resources management functions for managers and employees. Managers and employees can then use an intranet and Web browser to have easy and intuitive access to personal and career management functionality.

Oracle Payables User Guide

This guide provides information about entering and managing suppliers, invoices, and payments.

Oracle Projects User Guide

This guide provides information about entering and managing projects, budgets, expenditures, costing, and billing.

Oracle Receivables User Guide

This guide provides information about entering and managing customers, receipts, collections, and transactions.

Oracle Business Intelligence System Implementation Guide

This guide provides information about implementing Oracle Business Intelligence (BIS) in your environment.

BIS 11i User Guide Online Help

This guide is provided as online help only from the BIS application and includes information about intelligence reports, Discoverer workbooks, and the Performance Management Framework.

Oracle Financials Open Interface Reference

This guide is a compilation of all open interface descriptions in all Oracle Financial Applications user's guides.

Oracle XML Gateway User's Guide

This guide explains how to implement the production and consumption of valid, well-formed XML messages between Oracle Applications and trading partners.

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11i. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications and the Oracle Database technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle Applications file system and database.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer 6i forms so that they integrate with Oracle Applications.

Other Implementation Documentation

Oracle Applications Product Update Notes

Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11*i*. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

Multiple Reporting Currencies in Oracle Applications

If you use the Multiple Reporting Currencies feature to record transactions in more than one currency, use this manual before implementing Oracle Workflow. This manual details additional steps and setup considerations for implementing Oracle Workflow with this feature.

Multiple Organizations in Oracle Applications

This guide describes how to set up and use Oracle Workflow with Oracle Applications' Multiple Organization support feature, so you can define and support different organization structures when running a single installation of Oracle Workflow.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle Workflow implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on *OracleMetaLink*.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Oracle Manufacturing APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Manufacturing.

Oracle Order Management Suite APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Order Management Suite.

Oracle Applications Message Reference Manual

This manual describes all Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11*i*.

Training and Support

Training

Oracle offers a complete set of training courses to help you and your staff master Oracle Workflow and reach full productivity quickly. These

courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Workflow working for you. This team includes your Technical Representative and Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle Database, and your hardware and software environment.

Do Not Use Database Tools to Modify Oracle Applications Data

*Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.*

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle Database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

About Oracle

Oracle develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources, and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

Your Feedback

Thank you for using Oracle Workflow and this guide.

Oracle values your comments and feedback. At the end of this guide is a Reader's Comment Form you can use to explain what you like or dislike about Oracle Workflow or this guide. Mail your comments to the following address or call us directly at (650) 506-7000.

Oracle Applications Documentation Manager
Oracle Corporation
500 Oracle Parkway
Redwood Shores, CA 94065
U.S.A.

Or, send electronic mail to **appsdoc_us@oracle.com**.

CHAPTER

1

Overview of Oracle Workflow

This chapter introduces you to the concept of a workflow process and to the major features of Oracle Workflow.

Overview of Oracle Workflow for Users

Oracle Workflow delivers a complete workflow management system that supports business process based integration. Its technology enables modeling, automation, and continuous improvement of business processes, routing information of any type according to user-defined business rules.

E-business is accelerating the demand for integration of applications within the enterprise as well as integration of a company's systems with trading partners and business-to-business exchanges. Oracle Workflow automates and streamlines business processes both within and beyond your enterprise, supporting traditional applications based workflow as well as e-business integration workflow. Oracle Workflow is unique in providing a workflow solution for both internal processes and business process coordination between applications.

Routing Information

Business processes today involve getting many types of information to multiple people according to rules that are constantly changing. With so much information available, and in so many different forms, how do you get the right information to the right people? Oracle Workflow lets enterprises provide each person with all the information they need to take action. Oracle Workflow can route supporting information to each decision maker in a business process, including people both inside and outside the enterprise.

Defining and Modifying Business Rules

Oracle Workflow lets you define and continuously improve your business processes using a drag-and-drop process designer.

Unlike workflow systems that simply route documents from one user to another with some approval steps, Oracle Workflow lets you model sophisticated business processes. You can define processes that loop, branch into parallel flows and then rendezvous, decompose into subflows, and more. Because Oracle Workflow can decide which path to take based on the result of a stored procedure, you can use the power of Java and of PL/SQL, the language of the Oracle Database, to express any business rule that affects a workflow process. See: Workflow Processes: page 1 – 6.

Delivering Electronic Notifications

Oracle Workflow extends the reach of business process automation throughout the enterprise and beyond to include any e-mail or Internet user. Oracle Workflow lets people receive notifications of items awaiting their attention via e-mail, and act based on their e-mail responses. You can even view your list of things to do, including necessary supporting information, and take action using a standard Web browser.

Integrating Systems

Oracle Workflow lets you set up subscriptions to business events which can launch workflows or enable messages to be propagated from one system to another when business events occur. You can communicate events among systems within your own enterprise and with external systems as well. In this way, you can implement point-to-point messaging integration or use Oracle Workflow as a messaging hub for more complex system integration scenarios. You can model business processes that include complex routing and processing rules to handle events powerfully and flexibly.

Major Features and Definitions

Oracle Workflow Builder

Oracle Workflow Builder is a graphical tool that lets workflow developers create, view, or modify a business process with simple drag and drop operations. Using the Workflow Builder, you can create and modify all workflow objects, including activities, item types, and messages. See: Workflow Processes: page 1 – 6.

At any time you can add, remove, or change workflow activities, or set up new prerequisite relationships among activities. You can easily work with a summary-level model of your workflow, expanding activities within the workflow as needed to greater levels of detail. And, you can operate Oracle Workflow Builder from a desktop PC or from a disconnected laptop PC.

Workflow Engine

The Workflow Engine embedded in the Oracle Database implements process definitions at runtime. The Workflow Engine monitors workflow states and coordinates the routing of activities for a process.

Changes in workflow state, such as the completion of workflow activities, are signaled to the engine via a PL/SQL API or a Java API. Based on flexibly-defined workflow rules, the engine determines which activities are eligible to run, and then runs them. The Workflow Engine supports sophisticated workflow rules, including looping, branching, parallel flows, and subflows.

Business Event System

The Business Event System is an application service that uses the Oracle Advanced Queuing (AQ) infrastructure to communicate business events between systems. The Business Event System consists of the Event Manager, which lets you register subscriptions to significant events, and event activities, which let you model business events within workflow processes.

When a local event occurs, the subscribing code is executed in the same transaction as the code that raised the event. Subscription processing can include executing custom code on the event information, sending event information to a workflow process, and sending event information to other queues or systems.

Workflow Definitions Loader

The Workflow Definitions Loader is a utility program that moves workflow definitions between database and corresponding flat file representations. You can use it to move workflow definitions from a development to a production database, or to apply upgrades to existing definitions. In addition to being a standalone server program, the Workflow Definitions Loader is also integrated into Oracle Workflow Builder, allowing you to open and save workflow definitions in both a database and file.

Complete Programmatic Extensibility

Oracle Workflow lets developers include custom PL/SQL procedures or external functions as activities in workflows. Without modifying your application code, you can have your own program run whenever the Workflow Engine detects that your program's prerequisites are satisfied.

Electronic Notifications

Oracle Workflow lets you include users in your workflows to handle activities that cannot be automated, such as approvals for requisitions or sales orders. The Notification System sends notifications to and

processes responses from users in a workflow. Electronic notifications are routed to a role, which can be an individual user or a group of users. Any user associated with that role can act on the notification.

Each notification includes a message that contains all the information a user needs to make a decision. The information may be embedded in the message body or attached as a separate document. Oracle Workflow interprets each notification activity response to decide how to move on to the next workflow activity.

Electronic Mail Integration

Electronic mail (e-mail) users can receive notifications of outstanding work items and can respond to those notifications using their e-mail application of choice. An e-mail notification can include an attachment that provides another means of responding to the notification.

Internet-Enabled Workflow

Any user with access to a standard Web browser can be included in a workflow. Web users can access a Notification Web page to see their outstanding work items, then navigate to additional pages to see more details or provide a response.

Monitoring and Administration

Workflow administrators and users can view the progress of a work item in a workflow process by connecting to the Workflow Monitor using a standard Web browser that supports Java. The Workflow Monitor displays an annotated view of the process diagram for a particular instance of a workflow process, so that users can get a graphical depiction of their work item status. The Workflow Monitor also displays a separate status summary for the work item, the process, and each activity in the process.

If you are using the version of Oracle Workflow embedded in Oracle Applications and you have implemented Oracle Applications Manager, you can also use the Oracle Workflow Manager component of Oracle Applications Manager as an additional administration tool for Oracle Workflow. Oracle Applications Manager is a tool that provides administrative and diagnostic capabilities for concurrent processing, Oracle Workflow, and other functionality in Oracle Applications. For more information, please refer to the Oracle Applications Manager online help.

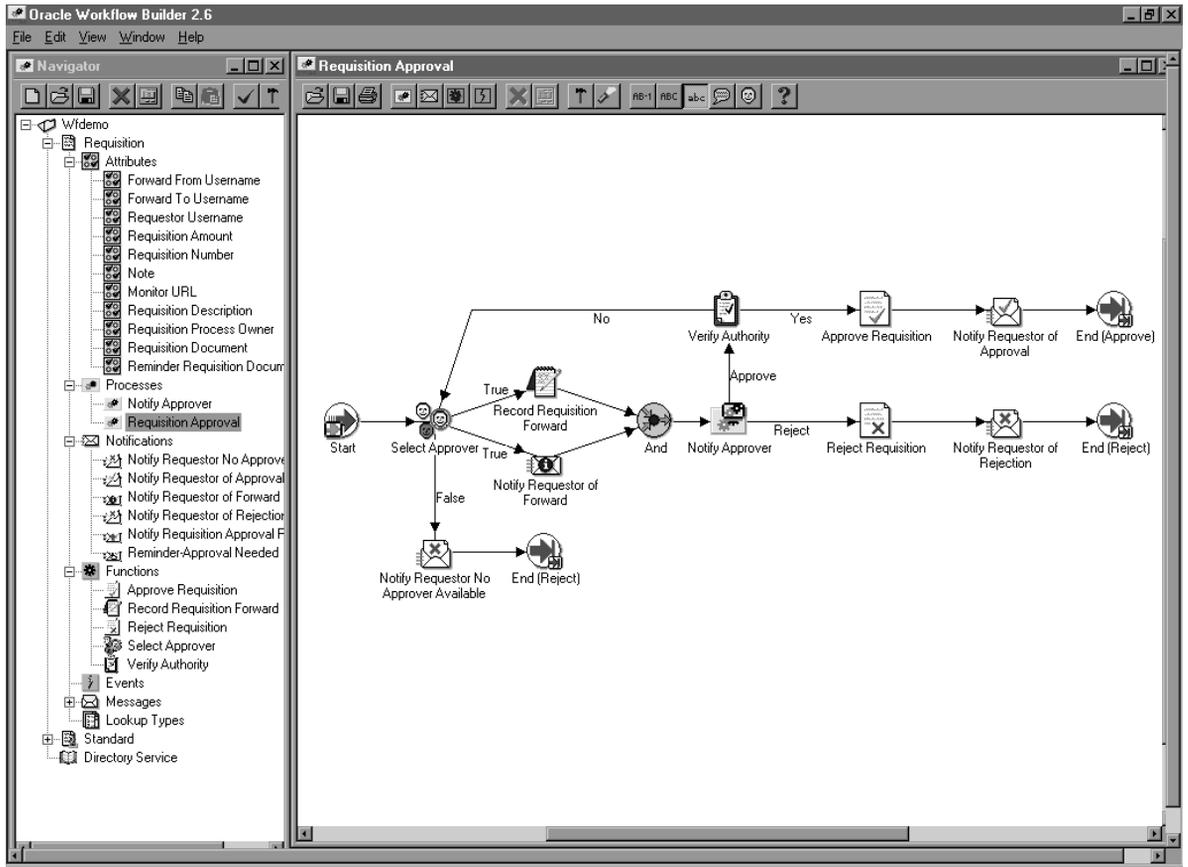
Also, if you are using the standalone version of Oracle Workflow, you can use the standalone Oracle Workflow Manager component available through Oracle Enterprise Manager as an additional administration tool for Oracle Workflow. For more information, please refer to the Oracle Workflow Manager online help.

Workflow Processes

Oracle Workflow manages business processes according to rules that you define. The rules, which we call a workflow process definition, include the activities that occur in the process and the relationship between those activities. An activity in a process definition can be an automated function defined by a PL/SQL stored procedure or an external function, a notification to a user or role that may optionally request a response, a business event, or a subflow that itself is made up of a more granular set of activities.

A workflow process is initiated when an application calls a set of Oracle Workflow Engine APIs. The Workflow Engine takes over by driving the relevant work item defined by the application, through a specific workflow process definition. According to the workflow process definition, the Workflow Engine performs automated steps and invokes appropriate agents when external processing is required.

The following diagram depicts a simplified workflow process definition that routes a requisition to a manager or set of managers for approval.



We refer to the whole drawing as a process or process diagram. The icons represent activities, and the arrows represent the transitions between the activities. In the above example, new items are created for the process when a user creates and submits a requisition in the appropriate application.

This process contains several workflow activities implemented as PL/SQL stored procedures, including:

- Select Approver—to select, according to your business rules, who should approve the requisition.
- Verify Authority—to verify that a selected approver has the spending authority to approve the requisition.

CHAPTER

2



Oracle Workflow Home Page

This chapter discusses the Oracle Workflow home page, where users can centrally access all the web-based features of Oracle Workflow.

Accessing the Oracle Workflow Home Page

Use the Oracle Workflow home page to link to all of Oracle Workflow's web-based features. This page centralizes your access to the features so you do not have to remember individual URLs.

Note: If Oracle Internet Directory/Single Sign-On integration has been implemented for your installation of Oracle Workflow, you can use single sign-on when accessing Oracle Workflow's web-based features. With single sign-on, a user who is logged into any participating component is automatically authenticated when accessing any other participating component and does not need to log in again. See: Synchronizing Workflow Directory Services with Oracle Internet Directory, *Oracle Workflow Administrator's Guide*.

Note: For information about the self-service home page in the Oracle Applications Framework user interface format, currently available with the version of Oracle Workflow embedded in Oracle Applications, see: Accessing the Oracle Workflow Self-Service Home Page: page 2 – 8.

► To Access the Oracle Workflow Home Page

1. Use a web browser to connect to the URL for the home page:

```
<webagent>/wfa_html.home
```

<webagent> represents the base URL of the web agent configured for Oracle Workflow in your Web server. See: Setting Global User Preferences, *Oracle Workflow Administrator's Guide*.



Attention: This is a secured page, so if you have not yet logged on as a valid user in the current web session, you will be prompted to do so before the page appears.



2. The web page identifies the current version of Oracle Workflow.
3. A toolbar appears in the upper left corner of the Oracle Workflow home page, as well as on every other Oracle Workflow web page. The Home icon returns you to the Oracle Workflow home page. The name of the current page appears in the middle of the toolbar. The Logout icon logs you out of your current Oracle Workflow web session and the Help icon displays online help for the current screen. Some of the Event Manager web pages also include a Query icon that lets you enter query details to search for Event Manager objects.
4. Choose the Worklist link to display your list of workflow notifications. You can close or reassign your notifications directly from the Worklist or you can drill down to the details of each specific notification and close, reassign, or respond to them individually. See: To View Notifications from the Worklist: page 3 – 22.
5. Choose the Find Notifications link to locate notifications that match specific criteria and act on those notifications. See: To Find Notifications: page 3 – 20.
6. Choose the Notification Rules link to view and define your automatic notification routing rules. If you are logged in as a role with workflow administrator privileges, the Find Automatic

Notification Processing Rules web page appears, letting you first display the routing rules for the role you specify. See: *To Define a Rule for Automatic Notification Routing*; page 3 – 31.

7. Choose the Find Processes link to query for a list of workflow process instances that match certain search criteria. Once you find a specific process instance, you can view its status details in the Workflow Monitor. See: *Using the Find Processes Web Page, Oracle Workflow Administrator's Guide*.
8. Choose the User Preferences link to set the preferences that control how you interact with Oracle Workflow. See: *Setting User Preferences*; page 2 – 4.

Setting User Preferences

You can control how you interact with Oracle Workflow by specifying user preferences that you can set from the User Preferences web page. The values that you specify in the User Preferences web page override the default global values set by your workflow administrator in the Global User Preferences web page.

► To Set User Preferences

1. Use a web browser to connect to the Oracle Workflow home page:

```
<webagent>/wfa_html.home
```

From the Oracle Workflow home page, choose the User Preferences link.

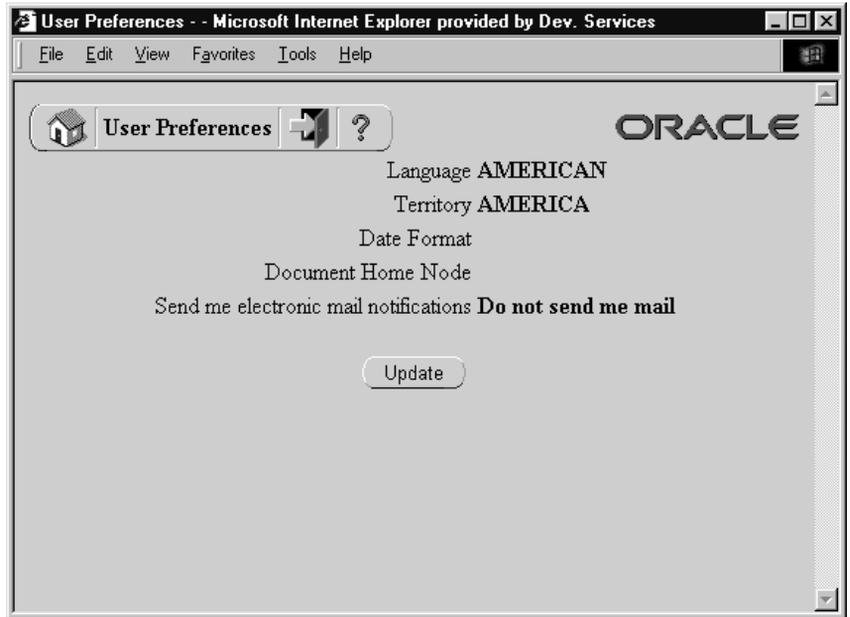
Alternatively, you can connect directly to the User Preferences web page:

```
<webagent>/wf_pref.edit
```

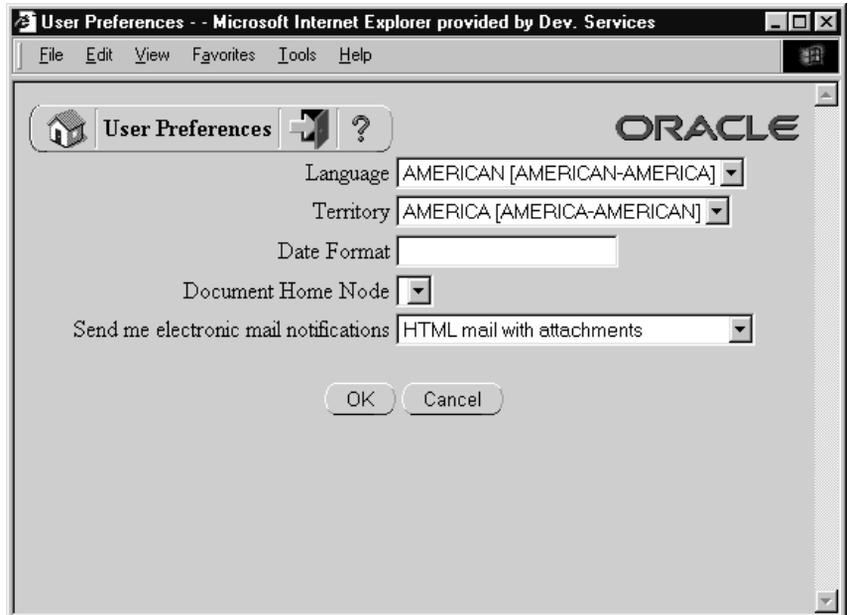
`<webagent>` represents the base URL of the web agent configured for Oracle Workflow in your Web server. See: *Setting Global User Preferences, Oracle Workflow Administrator's Guide*.



Attention: These are secured pages, so if you have not yet logged on as a valid user in the current web session, you will be prompted to do so before the page appears.



2. The User Preferences web page displays a summary of your current user preferences. Choose Update to modify these preferences.



3. In the Language and Territory fields, use the list of values to select the NLS_LANGUAGE and NLS_TERRITORY combination that defines the default language–dependent behavior and territory–dependent formatting of your notification sessions.
4. In the Date Format field, specify an Oracle Database–compliant date format to use for your database session. An example of an Oracle Database–compliant date format is DD–Mon–RRRR. If you do not specify a date format, then the date format defaults to DD–MON–YYYY.

Note: Oracle Workflow may include a time element when relevant for certain displayed dates, even if you do not include a time format with your date format. If you specify a time format along with your date format, then in those situations when Oracle Workflow displays a time element, you will see two time elements following your date.

5. Leave the Document Home Node field blank. This functionality is reserved for future use.
6. In the ‘Send me electronic mail notifications’ section, select a notification preference:
 - HTML mail with attachments – send you notifications as HTML e–mail with attached links to the Notification Details page. Your mail reader must be able to display HTML formatting in the message body.
 - Plain text mail with HTML attachments – send you notifications as plain text e–mail but include the HTML–formatted version of the notifications and links to the Notification Details page as attachments.
 - Plain text mail – send you notifications as plain text e–mail.
 - Plain text summary mail – send you a summary of all notifications as plain text e–mail. You must use the Worklist web page to take action on individual notifications.
 - Do not send me mail – do not send you notifications as e–mail. You must view the notifications and take action from the Worklist web page.
 - HTML mail – send you notifications as HTML e–mail only, without any standard attachments. If custom attachments have been defined for individual notifications in a process, however, those attachments will still be included. Your mail reader must be able to display HTML formatting in the message body.

7. Choose OK once you are satisfied with your changes.

See Also

Notification Preferences, *Oracle Workflow Administrator's Guide*

Accessing the Oracle Workflow Self-Service Home Page

Note: The Oracle Workflow web pages are being converted to the Oracle Applications Framework user interface format. Depending on your version of Oracle Workflow and which patches you have applied, you may see Oracle Workflow web pages in the new format as well as in the previous format. The self-service home page is currently available for the version of Oracle Workflow embedded in Oracle Applications.

Use the Oracle Workflow self-service home page to link to Oracle Workflow's web-based self-service features. This page centralizes your access to the features.

► To Access the Oracle Workflow Self-Service Home Page

1. Use a web browser to navigate to the self-service home page, using a responsibility and navigation path specified by your system administrator. See: Oracle Workflow User Navigation Paths: page A – 2.

You can navigate to the self-service home page from other Oracle Workflow self-service web pages by choosing the Home tab or selecting the Home link at the bottom of the page.

The screenshot shows the Oracle Workflow Self-Service Home Page in a Microsoft Internet Explorer browser window. The page has a header with the Oracle Workflow logo and navigation tabs: Home, Status Monitor, and Notifications. Below the header, there is a welcome message: "Welcome Johnson, Ms. Alex to Oracle Workflow".

The "Notifications" section contains a table of notifications:

From	Type	Subject	Sent	Due
Walker, Mr. Kenneth (Ken)	Requisition	Requisition 7564, Office equipment for 1,200.00 requires...	31-Mar-2003	31-Mar-2003
Walker, Mr. Kenneth (Ken)	Requisition	Requisition 7559, Software licenses for 800.00 require...	31-Mar-2003	31-Mar-2003
Walker, Mr. Kenneth (Ken)	Requisition	More Information Requested: Requisition 7556, Computer equipment...	31-Mar-2003	31-Mar-2003

Below the notifications table, there is a "Status at a Glance" section with a table of workflows:

Status	Workflow Type	Workflow	Started	Completed
✓	Active Requisition	IK7578	31-Mar-2003 15:51:28	

The footer of the page includes navigation links: Home | Status Monitor | Notifications | Return to Portal | Logout | Preferences | Help, and a copyright notice: Copyright 2003 Oracle Corporation. All rights reserved.

2. Navigation buttons appear in the upper right corner of the home page, as well as on every other Oracle Workflow web page.
 - To return to the Oracle E-Business Suite portal page, select the Return to Portal button.
 - To log out of the Oracle E-Business Suite, select the Logout button.
 - To set your Oracle E-Business Suite general preferences, select the Preferences button. See: Preferences, *Oracle Applications User's Guide*.
 - To view online help for the current page, select the Help button.

You can also access these pages by selecting the corresponding links at the bottom of the current page.

3. The Notifications region of the home page lists your five highest priority notifications, ordered by priority and then by date. For each notification, the list displays the from role, workflow type, subject, sent date, and due date. Select the From, Type, Subject, Sent, or Due column heading to sort the list by that column.
 - To view and respond to a notification, select the notification subject link in the Subject column. See: To View the Details of a Notification: page 3 – 42.
 - To view the complete list of all your notifications, select the Full List button. When the full list is displayed, the Notifications region also displays the View pull-down menu, the Open button, and the Reassign, Delegate, or Transfer button.
 - To specify which notifications to display in the Worklist, select the type of notifications you want from the View pull-down menu and select Go. You can choose to view Open Notifications, FYI Notifications, To Do Notifications, All Notifications, or Notifications From Me. If you choose All Notifications, the list additionally displays the status for each notification. If you choose Notifications From Me, the list displays the recipient of each notification instead of the from role.
 - To view and respond to a notification or a group of notifications, select the notification or notifications you want and select the Open button. If you select more than one notification to open, only one notification is displayed at a time. You can navigate among the open notifications by selecting the Next or Back buttons in the Notification

Details page. See: To View the Details of a Notification: page 3 – 42.

- To collectively reassign a group of notifications, select the notifications you want and select the Reassign button, the Delegate button, or the Transfer button. The Reassign button appears if you have access to reassign notifications to another user either by delegating the notifications or by transferring complete ownership of the notifications. The Delegate button appears if you only have access to delegate the notifications. The Transfer button appears if you only have access to transfer ownership of the notifications. See: To Reassign a Notification to Another User: page 3 – 47 and Setting the FND: Notification Reassign Mode Profile Option, *Oracle Workflow Administrator's Guide*.

Note: Your workflow may include special logic to restrict reassignment of notifications. If any of the notifications that you selected are restricted in this way, Oracle Workflow displays an error message when you select the Reassign, Delegate, or Transfer button. In this case you should deselect the restricted notifications before performing the reassignment. See: #HIDE_REASSIGN Attribute, *Oracle Workflow Developer's Guide*.

Additionally, you cannot reassign a voting notification that tallies the recipients' responses. See: Voting Activity, *Oracle Workflow Developer's Guide*.

4. The Status at a Glance region displays the five most recent workflows that you own and that were started within the last two weeks. For each workflow, the list displays the status, workflow type, workflow identifier, start date, and completion date. Select the Workflow Type, Workflow, or Started column heading to sort the list by that column.
 - To view the error details for an errored workflow, select the error icon or the error link in the Status column. See: Viewing Error Information for a Workflow: page 4 – 12.
 - To view the notification history for a workflow, select the workflow identifier link in the Workflow column. See: Viewing Notification History: page 4 – 5.
 - To view the complete list of all your workflows in the Status Monitor, select the Full List button. See: Viewing Workflows in the Status Monitor: page 4 – 2.

5. To view notifications in the Notifications Worklist, choose the Notifications tab, or select the Notifications link at the bottom of the page. See: *To View Notifications from the Advanced Worklist*: page 3 – 38.
6. To view the Workflow Monitor, choose the Status Monitor tab, or select the Status Monitor link at the bottom of the page. See: *Accessing the Self-Service Monitor*: page 4 – 2.

CHAPTER

3

Viewing Notifications and Processing Responses

This chapter discusses the different ways people involved in a workflow process can view and respond to workflow notifications. This chapter also describes how you can define rules to have Oracle Workflow automatically handle your notifications.

Overview of Notification Handling

Oracle Workflow sends a notification to a role when the Workflow Engine executes a notification activity in a workflow process. The notification activity may designate the role as being responsible for performing some human action or may simply relay process-related information to the role. To successfully deliver a notification to a role, the role must be defined in the Oracle Workflow directory service.

As a member of a role, you can view a notification using any one of three interfaces depending on your role's notification preference setting in the Oracle Workflow directory service. You can receive an e-mail for each individual notification, receive a single e-mail summarizing all your notifications or query the Workflow Notifications Web page for your notifications. If you choose to receive an e-mail for each individual notification, you can also choose the format in which you want to receive the e-mails. See: *Setting Up an Oracle Workflow Directory Service, Oracle Workflow Administrator's Guide* and *Setting User Preferences*: page 2 – 4.

Each notification message can include context-sensitive information about the process and directions on how to respond to the notification, if a response is required. The message can also include pointers to Web URLs and references to Oracle Applications forms that allow the user to get additional information related to the notification.

As a notification recipient, there may be occasions when you will not be able to view or respond to your notifications in a timely manner. Rather than create a bottleneck in a workflow process, you can take advantage of the Automatic Notification Handler to define rules that direct Oracle Workflow to automatically manage the notifications for you.

Reviewing Notifications via Electronic Mail

You can have your workflow notifications delivered to you as e-mail messages if your notification preference is set to 'Plain text mail', 'HTML mail with attachments', 'HTML mail', or 'Plain text mail with attachments' in the User Preferences web page and your workflow administrator sets up a notification mailer to run.

If your e-mail reader can only support plain text messages with no attachments, set your notification preference to 'Plain text mail'.

If your e-mail reader can interpret and display HTML-formatting in the body of a message, select 'HTML mail with attachments' or 'HTML

mail' as your notification preference. HTML mail provides direct links to supporting information sources that you may need access to to complete a notification. If you choose 'HTML mail with attachments', the e-mail messages include links to the Notification Detail page as standard attachments. If you choose 'HTML mail', the e-mail messages do not include these standard attachments. If custom attachments have been defined for individual notifications in a process, however, those attachments will still be included.

An HTML-formatted notification can also include an option for you to request more information about the notification from another user before you respond, if the notification is defined to allow such requests. See: #HIDE_MOREINFO Attribute, *Oracle Workflow Developer's Guide*.

If your e-mail reader can only display plain text in the body of a message, but can also display attachments to the message, set your notification preference to 'Plain text mail with Attachments'.

An e-mail notification that requires a response maintains an 'Open' status until you respond to the notification. For e-mail notifications that do not require a response, such as FYI (For Your Information) notifications, your workflow administrator determines how the notification status is updated when setting up a notification mailer. Depending on the setup configuration, either Oracle Workflow automatically updates the status of FYI notifications to 'Closed' after sending you the notifications by e-mail, or those notifications maintain an 'Open' status until you manually close them in the Notifications Worklist web page.

Once you read an FYI message, you can delete it from your inbox. However, if the notification mailers for your organization are set up to keep FYI notifications open after sending them by e-mail, you must also use the Worklist to manually close the notification, even if you have already deleted the notification message from your e-mail inbox. See: *To View Notifications from the Worklist: page 3 – 22*.

There are two response methods for plain text e-mail notifications: templated response or direct response. Your workflow administrator determines the response method for your organization when setting up a notification mailer. For the templated response method, you reply using the template of response prompts provided in the notification and enter your response values between the quotes following each prompt. For the direct response method, you enter your response values directly as the first lines of your reply.

Both templated and direct response e-mail notifications are based on standard message templates defined in Oracle Workflow Builder. Both describe the syntax the reply should follow and list the information

needed to confirm the notification. See: *Modifying Your Message Templates, Oracle Workflow Administrator's Guide*.

When you respond to a notification by e-mail, your reply message must include the notification ID (NID) and access key from the original notification message. Notification mailers can process your response properly only if you include the correct NID and access key combination in your response. You can ensure that your reply contains the NID and access key either by including the entire original message in your reply or by using a response template that includes the NID line.

Note: The notification access key is a distinct random key generated by the Notification System for each NID. The access key serves as a password that allows only users who actually received the notification containing the key to respond to that notification.

The format of the NID line is as follows:

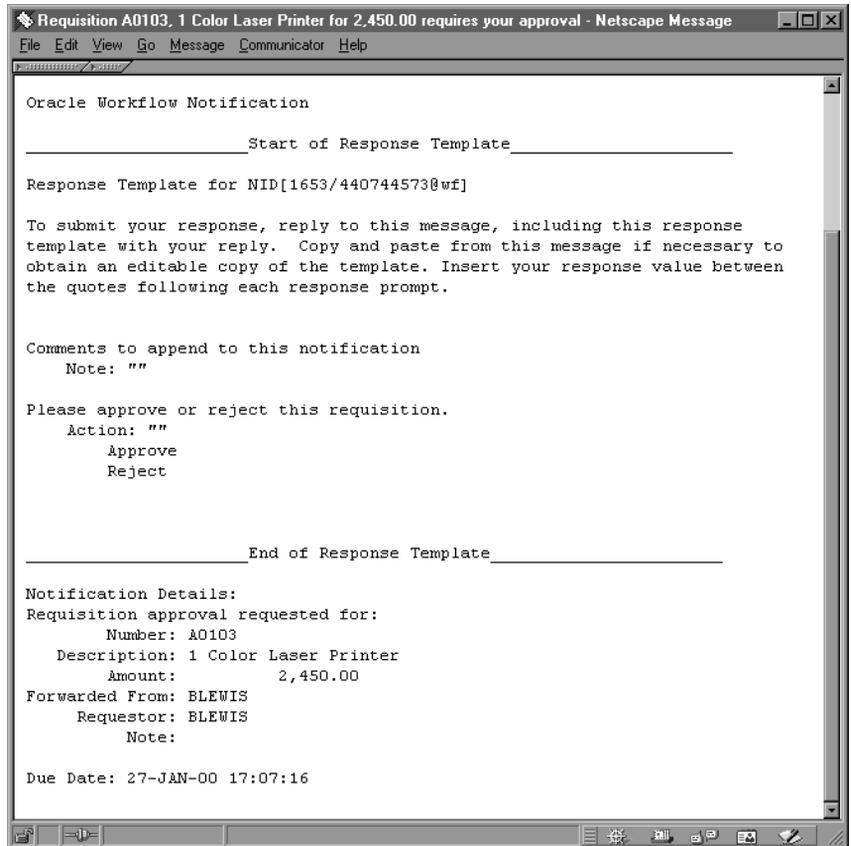
```
NID[9999/999999@XXXXXX]
```

Some mail clients, notably early releases of Microsoft Outlook Express, may not copy the NID line properly in a reply message. When responding to a notification, you should verify that the NID line is included in full and contains the prefix `NID` and all the details between the square brackets.

See Also

Setting Up Notification Mailers, Oracle Workflow Administrator's Guide

► **To Respond to a Plain Text E-mail Notification Using Templated Response**



1. Your plain text e-mail notification includes information that is helpful for you to respond to the notification. Depending on the notification, the information may appear as references to other sources or as attachments. Some attachments, depending on their content may only be viewable if you display your notification using the Notification web pages. See: Viewing Notifications from a Web Browser: page 3 – 17.
2. To respond to your notification, use the Reply command in your mail application to reply to the original e-mail notification.
3. Include the response template from the original notification in your reply. In addition to the response prompts, the response template includes the special notification ID and access key that a notification mailer requires to identify the notification you are

responding to. If your mail application includes an editable copy of the original message when it generates the reply message, you can use that copy to enter your response values. Otherwise, copy and paste from the original message to obtain a copy of the response template that you can edit.

4. Follow the response template instructions and insert your response values between the quotes (" ") following each response prompt. The Notification System interprets your response values literally, so a value in uppercase is interpreted differently from the same value in lowercase.

Note: When you are using the two double quotes to delimit your response, you can validly use a single quote character within your response value. For example, a response to a Comment prompt could be entered as follows:

```
Comment: "This proposal isn't acceptable."
```

However, you cannot validly use another double quote character within your response value in the default format. If you want to use the double quote character (") within your response value, you can optionally enter your response in one of the following alternate formats. You can use different formats for different responses within the same response message.

- You can enter a backslash (\) as an escape character before the double quote. For example, a response to a Comment prompt could be entered as follows.

```
Comment: 'The \"Equipment\" proposal is approved.'
```

- You can delete the two double quotes and enclose your response between two single quotes (') instead to delimit the response value. For example:

```
Comment: 'The "Equipment" proposal is approved.'
```

- You can delete the two double quotes and enclose your response between a left bracket and a right bracket ([]) instead to delimit the response value. For example:

```
Comment: [The "Equipment" proposal is approved.]
```

5. When you are satisfied with your response, use the Send command of the mail application to send your reply.

Note: If you send an invalid response, the Notification System sends you an "invalid response" message. If you respond to a notification that has been canceled, you get a message

informing you that the notification was canceled. Similarly, if you respond to a notification that was already previously responded to, you get a message informing you that the notification is closed.

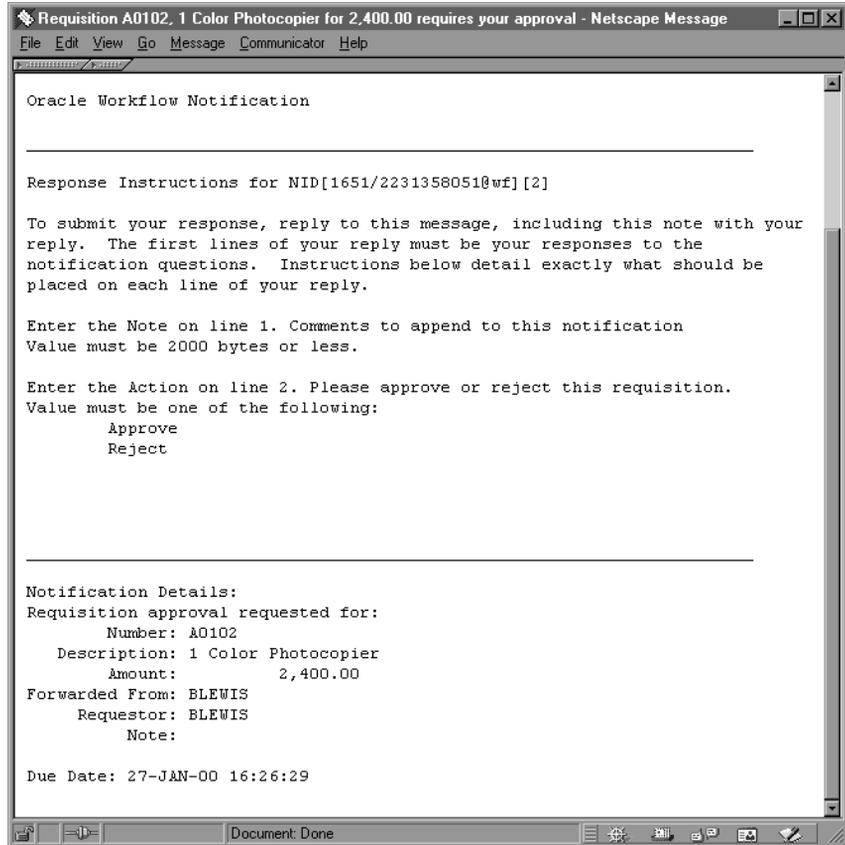
6. If another user sent you this notification with a request for more information, the notification displays the user who made the request, the history of any previous requests for more information about this notification and responses to those requests, and the details of the current request. Include the response template in your reply and insert your response values between the quotes (" ") following the response prompt. When you are satisfied with your response, use the Send command of the mail application to send your reply.
7. If this notification requires a password-based electronic signature in your response, you cannot respond to the notification through e-mail. In this case the notification informs you that a password-based signature is required and directs you to access the online version of the notification instead. Navigate to the Notification Details web page to submit your response. See: To View the Details of a Notification: page 3 – 42.

Note: Password-based electronic signatures are currently supported only for the version of Oracle Workflow embedded in Oracle Applications.

See Also

Plain Text E-mail, *Oracle Workflow Administrator's Guide*

► **To Respond to a Plain Text E-mail Notification Using Direct Response**



1. Your plain text e-mail notification includes information that is helpful for you to respond to the notification. Depending on the notification, the information may appear as references to other sources or as attachments. Some attachments, depending on their content may only be viewable if you display your notification using the Notification web pages. See: Viewing Notifications from a Web Browser: page 3 – 17.
2. To respond to your notification, use the Reply command in your mail application to reply to the original e-mail notification.
3. Include the text of the original notification message in your reply. This text contains the special notification ID and access key that a notification mailer requires to identify the notification you are responding to.

4. Follow the syntax instructions in the notification message carefully when formatting your reply. The response values must be within the first lines of your reply, where each line represents a separate response value.

If a response value requires more than one line, then the entire response value must be enclosed in double quotes (" "). Everything enclosed in the double quotes is counted as one line.

The Notification System interprets your response values literally, so a value in uppercase is interpreted differently from the same value in lowercase.

If a response prompt provides a default response value, you can accept the default value by leaving the appropriate response line blank.

5. When you are satisfied with your response, use the Send command of the mail application to send your reply.

Note: If you send an invalid response, the Notification System sends you an "invalid response" message. If you respond to a notification that has been canceled, you get a message informing you that the notification was canceled. Similarly, if you respond to a notification that was already previously responded to, you get a message informing you that the notification is closed.

6. If this notification requires a password-based electronic signature in your response, you cannot respond to the notification through e-mail. In this case the notification informs you that a password-based signature is required and directs you to access the online version of the notification instead. Navigate to the Notification Details web page to submit your response. See: To View the Details of a Notification: page 3 – 42.

Note: Password-based electronic signatures are currently supported only for the version of Oracle Workflow embedded in Oracle Applications.

Example Following is a set of response instructions and examples of three possible responses.

Response Instructions

Enter the Action on line 1. Do you approve? Value must be one of the following (default is "Reject"):
Approve
Reject
Enter the Review Comments on line 2. Value must be 2000 bytes or less.
Enter the Required Date on line 3. If there is no required date, leave this blank. Value must be a date in the form "DD-MON-YYYY".
Enter the Maximum Amount on line 4. This is the maximum approved amount. Value must be a number. Default is 1500.

Valid Response A – Approve

Approve
Let me know if this item meets expectations.
01-JAN-1998
1000.00

Valid Response B – Reject

Reject
Too expensive.

Note: The blank lines in this response indicate acceptance of the default values for those response values.

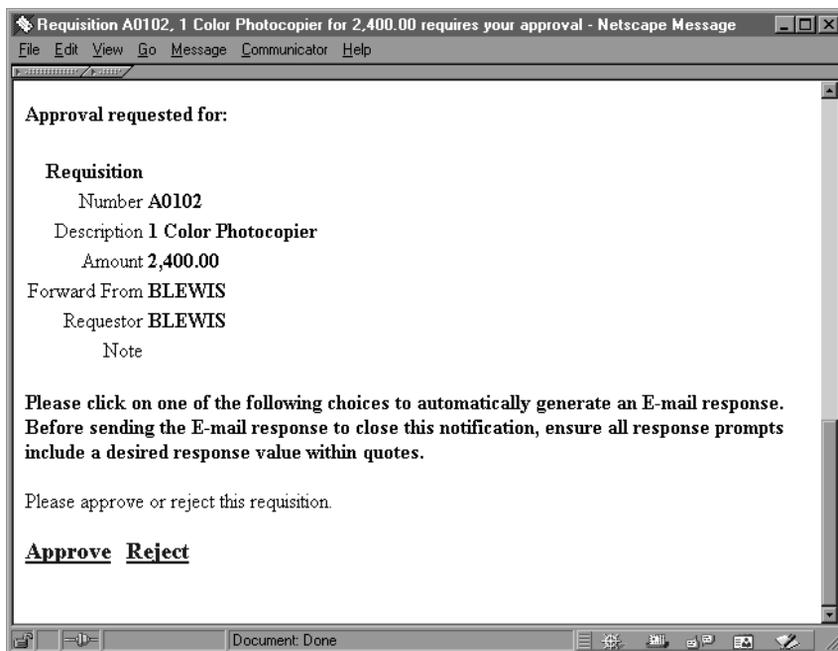
Valid Response C – Reject

Reject
"This item is too expensive. Please find a replacement that is of lower cost, or else include additional justification for why this item should be approved."
01-JAN-1998
1000.00

See Also

Plain Text E-mail, *Oracle Workflow Administrator's Guide*

► To Respond to an HTML E-mail Notification



1. Your HTML-formatted e-mail notification includes information that is helpful for you to respond to the notification. Depending on the notification, the information may appear as links to other sources or as attachments.



Attention: If your notification preference is 'HTML Mail with attachments', an HTML-formatted e-mail notification always

includes one standard attachment. The attachment is called Notification Detail Link and it provides a direct link to your notification in the Notification Details web page.

Note that your Web browser must support JavaScript and Frames to open this attachment. When you open the Notification Detail Link attachment, it automatically attempts to establish a web session with your web server. In doing so, it authenticates your access, verifies that your notification is still open, and displays a message if the notification is already closed.

In Oracle Applications, you must always log in before you can access the Oracle Applications Framework-based Notification Details web page. In the standalone version of Oracle Workflow, if your workflow administrator has configured the notification mailer that sent this notification to require a login when you select the Notification Detail Link, and you are not already logged in, you will be prompted to log in before you can access the Notification Details web page. Otherwise, in the standalone version of Oracle Workflow, you can access the Notification Details page for this notification directly, but you cannot access any other Oracle Workflow pages unless you are logged in.

You can respond directly to your notification from the Notification Details page, bypassing the need to process your response through a notification mailer. If you decide to respond from the Notification Details page, skip the remaining steps. See: *To View the Details of a Notification: page 3 – 24* or *To View the Details of a Notification (for Oracle Applications): page 3 – 42*.

If your notification preference is 'HTML mail', then your HTML-formatted e-mail notification does not include this standard attachment. However, if custom attachments have been defined for this individual notification in its workflow process, those attachments will still be included.

2. When you are done reviewing all the information for the notification, click on one of the response links shown at the end of the notification.

Note: If your workflow administrator has configured the notification mailer that sent this message to use the standard Workflow Open Mail for Outlook Express message template, or if this notification is defined to use that template, then a link called "Click here to respond" will appear in place of the links for individual responses. The "Click here to respond" link

provides access to your notification in the Notification Details web page.

Note that your Web browser must support JavaScript and Frames to open this link. When you choose the "Click here to respond" link, it automatically attempts to establish a web session with your web server. In doing so, it authenticates your access, verifies that your notification is still open, and displays a message if the notification is already closed. If you are disconnected from your network, however, you will not be able to use the link.

Once you have accessed the Notification Details page, you can respond directly to your notification from this page. In this case, you should skip the remaining steps.

3. Each response link automatically generates a plain text e-mail reply. The reply contains the correct Reply To: e-mail address as well as a response template in the message body. The response template consists of the required notification ID and access key that identify the notification you are responding to and a response prompt edited with your selected response.



Warning: Do not include any HTML-formatting in the e-mail response.

4. Depending on the notification, the auto-generated e-mail response template may also prompt you for other information in addition to your selected response. Supply responses by editing the response value text between the quotes (' ') following each response prompt.

Note: Response templates generated from a response link in an HTML-formatted e-mail notification provide single quotes to enclose your response values, rather than the double quotes provided in plain text response templates. This use of single quotes accommodates e-mail applications that cannot process double quotes in the tag for the link but can accept single quotes.

Depending on how your mail application displays these characters, the two single quote characters (' ') following a response prompt may visually resemble one double quote character ("). Ensure that you insert your response between the the two quotes, rather than after them.

When you are using the two single quotes to delimit your response, you can validly use a double quote character within your response value. For example, a response to a Comment prompt could be entered as follows:

```
Comment: 'The "Equipment" proposal is approved.'
```

However, you cannot validly use another single quote character within your response value in the default format. If you want to use the single quote character (') as an apostrophe within your response value, you can optionally enter your response in one of the following alternate formats. You can use different formats for different responses within the same response message.

- You can enter a backslash (\) as an escape character before the apostrophe. For example, a response to a Comment prompt could be entered as follows.

```
Comment: 'This proposal isn\'t acceptable.'
```

- You can delete the two single quotes and enclose your response between two double quotes (" ") instead to delimit the response value. For example:

```
Comment: "This proposal isn't acceptable."
```

- You can delete the two single quotes and enclose your response between a left bracket and a right bracket ([]) instead to delimit the response value. For example:

```
Comment: [This proposal isn't acceptable.]
```

5. When you are satisfied with your response, use the Send command of the mail application to send your reply.

Note: If you send an invalid response, the Notification System sends you an "invalid response" message. If you respond to a notification that has been canceled, you get a message informing you that the notification was canceled. Similarly, if you respond to a notification that was already previously responded to, you get a message informing you that the notification is closed.

6. In addition to the response links, an HTML-formatted notification can also include a Request Information link. Choose this link if you want to request more information about the notification from another user before you respond to the notification.

The Request Information link automatically generates a plain text e-mail reply. The reply contains the correct Reply To: e-mail address as well as a request template in the message body. The request template contains the required notification ID and access key that identify the notification you are responding to. It also contains a prompt for you to enter the user from whom you want to request information, along with a list of users who have previously participated in the workflow process, and a prompt for

you to enter the question you want to ask that user. When you are satisfied with your request, use the Send command of the mail application to send your reply.



Attention: Your workflow may include special logic to restrict requesting more information on notifications. If so, the Request Information link is not displayed in the e-mail notification. See: #HIDE_MOREINFO Attribute, *Oracle Workflow Developer's Guide*.

7. If another user sent you this notification with a request for more information, the notification displays the user who made the request, the history of any previous requests for more information about this notification and responses to those requests, and the details of the current request. Click the response link and enter the information you want to provide between the quotes (' ') following the response prompt. When you are satisfied with your response, use the Send command of the mail application to send your reply.
8. If this notification requires a password-based electronic signature in your response, you cannot respond to the notification through e-mail. In this case the notification informs you that a password-based signature is required and directs you to access the online version of the notification instead. Navigate to the Notification Details web page to submit your response. See: To View the Details of a Notification: page 3 – 42.

Note: Password-based electronic signatures are currently supported only for the version of Oracle Workflow embedded in Oracle Applications.

See Also

HTML-Formatted E-mail, *Oracle Workflow Administrator's Guide*

► To Respond to a Plain Text E-mail Notification with an HTML Attachment

1. Your plain text e-mail notification with attachments includes information that is helpful for you to respond to the notification. Depending on the notification, the information may appear inline in the message body, as links to other reference sources or as attachments to the message. In addition, the notification always includes at least two attachments:
 - HTML Message Body—an HTML-formatted version of the notification message.

- Notification Detail Link—a direct link to your notification displayed in the Notification Details web page.
2. When you are done reviewing all the information for the notification, you can respond to the notification in one of three ways:
 - Use your mail reader’s Reply command to respond, following the instructions in the plain text message body. See: To Respond to a Plain Text E-mail Notification Using Templated Response: page 3 – 5 and To Respond to a Plain Text E-mail Notification Using Direct Response: page 3 – 8.
 - Display the HTML Message Body attachment and respond by selecting one of the response links at the bottom of the HTML message body. See: To Respond to an HTML E-mail Notification: page 3 – 11.
 - Choose the Notification Detail Link attachment to display the Notification Details web page. See: To View the Details of a Notification: page 3 – 24 or To View the Details of a Notification (for Oracle Applications): page 3 – 42.

Note: Your Web browser must support JavaScript and Frames to open this attachment. When you open the Notification Detail Link attachment, it automatically attempts to establish a web session with your web server. In doing so, it authenticates your access, verifies that your notification is still open, and displays a message if the notification is already closed.

In Oracle Applications, you must always log in before you can access the Oracle Applications Framework-based Notification Details web page. In the standalone version of Oracle Workflow, if your workflow administrator has configured the notification mailer that sent this notification to require a login when you select the Notification Detail Link, and you are not already logged in, you will be prompted to log in before you can access the Notification Details web page. Otherwise, in the standalone version of Oracle Workflow, you can access the Notification Details page for this notification directly, but you cannot access any other Oracle Workflow pages unless you are logged in.

3. If this notification requires a password-based electronic signature in your response, you cannot respond to the notification through e-mail. In this case the notification informs you that a password-based signature is required and directs you to access the online version of the notification instead. Navigate to the

Notification Details web page to submit your response. See: To View the Details of a Notification: page 3 – 42.

Note: Password-based electronic signatures are currently supported only for the version of Oracle Workflow embedded in Oracle Applications.

See Also

Plain Text E-mail with an HTML Attachment, *Oracle Workflow Administrator's Guide*

► To Reassign a Notification to Another User:

- Use the "Forward" feature in your mail reader to forward or reassign an e-mail notification to another user. Do not use the "Reassign" button on the HTML attachment.



Attention: When you forward a notification to another user via e-mail, you are simply asking that user to respond to the notification on your behalf. Note that you still maintain ownership of the notification. If you want to transfer the notification and ownership of the notification to another user, you can only do so from the Notifications web pages. See: Viewing Notifications from a Web Browser: page 3 – 17.

Viewing Notifications from a Web Browser

You can use any Web browser that supports JavaScript and Frames to view and respond to your notifications in the Notifications Web page.

Note: For information about the Worklist pages in the Oracle Applications Framework user interface format, currently available with the version of Oracle Workflow embedded in Oracle Applications, see: Viewing Notifications from a Web Browser for Oracle Applications: page 3 – 38.

► To Access Notifications from a Web Browser

1. If you are using Oracle Self-Service Web Applications, log on using the Oracle Self-Service Web Applications login page and choose the appropriate link to display the Notifications Worklist page. Skip to Step 1.

2. If you are not using Oracle Self-Service Web Applications, you can access your worklist in one of several ways.
 - To navigate directly to your current worklist of open notifications, enter:

```
<webagent>/wfa_html.worklist[?orderkey=<orderkey>
&status=<status>&user=<user>]
```

The portion of the Worklist URL in square brackets [] represents optional arguments that you can pass (by omitting the square brackets).

Replace the bracketed italicized text in these URLs as follows:

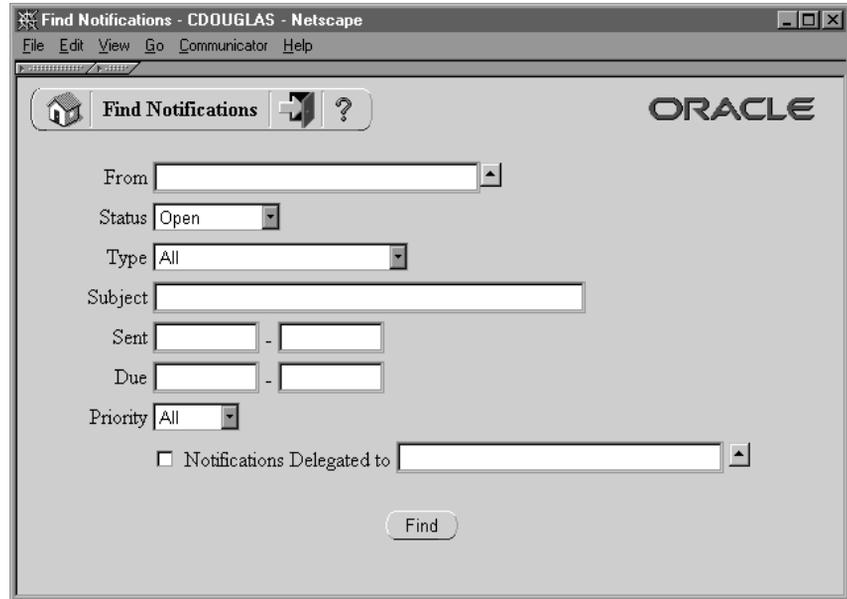
- *<webagent>* represents the base URL of the web agent configured for Oracle Workflow in your Web server. See: *Setting Global User Preferences, Oracle Workflow Administrator's Guide.*
 - *<orderkey>* represents the key with which to order the list of notifications. Valid values include PRIORITY, MESSAGE_TYPE, SUBJECT, BEGIN_DATE, DUE_DATE, END_DATE, and STATUS. If you leave *<orderkey>* null, the worklist will be ordered by PRIORITY, and then by BEGIN_DATE in descending order (the notifications with the highest priority and the most recent date will be displayed first).
 - *<status>* represents the status of the notifications you wish to display. Valid values include OPEN, CLOSED, CANCELED, and ERROR. If you leave *<status>* null, the URL will display notifications with a status of OPEN.
 - *<user>* represents the internal name of the role to query notifications for. You can only include this argument if you are logged in to the current web session as a role with workflow administrator privileges. If your role does not have administrator privileges or if you leave *<user>* blank, the URL displays notifications for your current role. See: *Setting Global User Preferences, Oracle Workflow Administrator's Guide.*
- To display a worklist of notifications that match specific search criteria, go to the Find Notifications web page by entering:

```
<webagent>/wfa_html.find
```

- You can also navigate to the Notifications Worklist or Find Notifications web pages from the Oracle Workflow home page. See: *Accessing the Oracle Workflow Home Page*: page 2 – 2.
 - For Oracle Applications users only, your system administrator can add the Notifications Worklist web page to your application by using the Oracle Applications function FND_FNDWFNOT. This function calls the web page `wfa_html.worklist`. An Oracle Applications System Administrator or Oracle Applications developer must add this function to the Navigate menu of a user's responsibility or call this function from an Oracle Applications form. You can then use the modified menu or form to navigate to the Notifications Worklist web page. See: *Overview of Function Security, Oracle Applications System Administrator's Guide*, *Overview of Menus and Function Security, Oracle Applications Developer's Guide*, *Menus Window, Oracle Applications Developer's Guide*, and *Overview of Form Development Steps, Oracle Applications Developer's Guide*.
3. If you are not using Oracle Self-Service Web Applications and you are accessing any of the Oracle Workflow URLs for the first time in your web browser session, you will be prompted for a valid username and password to log on.
 4. Enter your username and password.
 5. Choose OK. If you have made an error, you can clear the values and start over.

If you used the `wfa_html.worklist` URL, skip to the Notification Worklist section: page 3 – 22.

► To Find Notifications



The screenshot shows a Netscape browser window titled "Find Notifications - CDOUGLAS - Netscape". The browser's menu bar includes "File", "Edit", "View", "Go", "Communicator", and "Help". The page content features the Oracle logo in the top right corner. Below the logo is a navigation bar with a home icon, the text "Find Notifications", and a question mark icon. The main area contains a search form with the following fields and controls:

- From:** A text input field with a dropdown arrow on the right.
- Status:** A dropdown menu currently showing "Open".
- Type:** A dropdown menu currently showing "All".
- Subject:** A wide text input field.
- Sent:** Two text input fields separated by a hyphen.
- Due:** Two text input fields separated by a hyphen.
- Priority:** A dropdown menu currently showing "All".
- Notifications Delegated to:** A checkbox followed by a text input field with a dropdown arrow.
- Find:** A button located at the bottom right of the form area.

1. The Find Notifications window lets you enter search criteria to locate specific notifications. If you are logged on to the current session as a regular workflow user, you can specify criteria to search for any notification(s) you own. The search criteria are:
 - **From** – enter a role to search for all notifications from that role. The From role for a notification is determined by the #FROM_ROLE message attribute. See: #FROM_ROLE Attribute, *Oracle Workflow Developer's Guide*.
 - **Status** – choose a notification status of Canceled, Closed, Invalid Reply, or Open. Choose All to display notifications of any status.
 - **Type** – choose the item type of the notification(s). Choose All to display notifications of any item type.
 - **Subject** – enter the subject of the notification you wish to search for. This field accepts case insensitive text strings and interprets the percent sign (%) as a wildcard.
 - **Sent** – enter the date or range of dates from which the notification(s) were sent. Use the default date format of your database.

- Due – enter the date or range of dates by which the notification(s) should be completed. Use the default date format of your database.
 - Priority – choose High, Normal or Low as the priority of the notification(s) you wish to find or choose All to display notifications of any priority.
 - Notifications Delegated to – check this criterion to search for notifications that you have forwarded to a specified role but yet still own. Click on the adjacent field’s up arrow icon to display a list of roles from which to choose. See: Using a List of Values: page 3 – 29.
2. As a user with workflow administrator privileges, you can also search for notifications that you do not own. See: Setting Global User Preferences, *Oracle Workflow Administrator’s Guide*.

The screenshot shows a web browser window titled "Find Notifications - CDOUGLAS - Netscape". The browser's menu bar includes "File", "Edit", "View", "Go", "Communicator", and "Help". The page header features a "Find Notifications" button with a home icon and a question mark icon, and the "ORACLE" logo on the right. The search form contains the following fields:

- Notification ID:
- OR:
- Owner:
- To:
- From:
- Status:
- Type:
- Subject:
- Sent: -
- Due: -
- Priority:

A "Find" button is located at the bottom center of the form.

In addition to being able to specify any of the standard search criteria listed above except for "Notifications Delegated to", you also have the following criteria options:

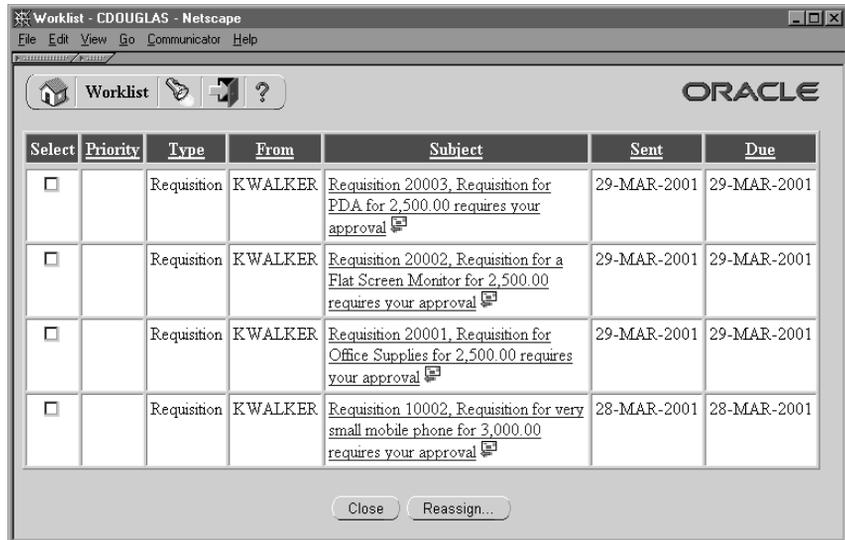
- Notification ID—enter a specific notification ID. Note that if you specify a notification ID, all other search criteria are ignored.

- Owner—enter a role to identify all notifications owned by that role. Click on the field’s up arrow icon to display a list of roles from which to choose. See: Using a List of Values: page 3 – 29.
- To—enter a role to identify all notifications sent to that role. Click on the field’s up arrow icon to display a list of roles from which to choose. See: Using a List of Values: page 3 – 29.

Note: To identify notifications where the original owner delegated the work to another role (without transferring ownership), specify different roles in the Owner and To fields. This combination of criteria is equivalent to selecting the “Notifications Delegated to” criterion in the standard Find Notifications screen.

3. Choose the Find button to open the Worklist window.

► **To View Notifications from the Worklist**



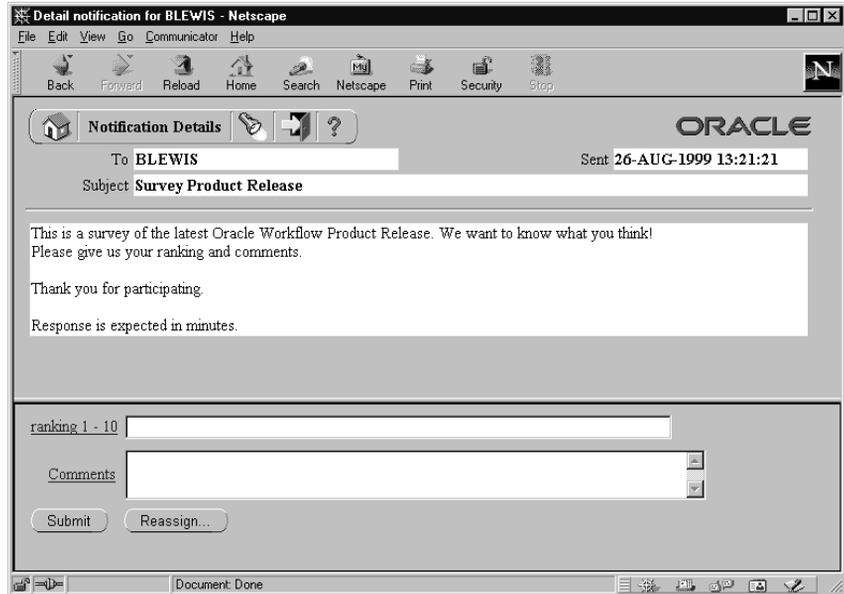
1. The Notifications Worklist either displays the notifications that match your search criteria if you navigated from the Find Notifications page, or lists all your open notifications if you navigated directly to this page.

The Worklist displays the following information for each notification:

- Priority—a high or low priority icon represents the urgency of the notification.

- **Type**—the item type with which the workflow process and notification is associated.
 - **From**—the role from which the notification was sent. The From role for a notification is determined by the #FROM_ROLE message attribute. See: #FROM_ROLE Attribute, *Oracle Workflow Developer's Guide*.
 - **Subject**—a description of the notification.
 - Note:** If a notification is Open and requires a response, a Response Required icon appears next to its Subject link.
 - **Sent**—date when the notification was delivered.
 - **Due**—date by which the notification should be completed.
2. Click on any column heading to sort your notifications by that column in ascending order.
 3. A Find icon in the toolbar lets you navigate back to the Find Notifications screen at any time so you can use search criteria to reduce the Worklist to a smaller subset of notifications.
 4. The Worklist lets you simultaneously close multiple FYI-type notifications that do not require a response. Simply check Select for the each FYI-type notification you wish to close, and then choose Close.
 5. You can also collectively reassign a group of notifications. Check Select for the notifications you wish to reassign, then choose Reassign... A Reassign page appears that lets you specify to whom and how you wish to reassign the notification(s). See: To Reassign a Notification to Another User: page3 – 27.
 6. You can navigate to the full details of any notification and act on the notification by clicking on the notification's Subject link.

► To View the Details of a Notification



1. In the Detail Notification page, the full details of the notification appear in the upper frame, and the response section of the notification appears in the lower frame. You can scroll through or resize these frames.
2. The upper frame may include links embedded in the message body to additional information sources for the notification. A reference URL link opens another Web browser window and connects to a specified URL.
3. The upper frame may also include attachment icons that appear after the message body. These icons also link to additional information sources for the notification. There are three types of attachment links:
 - A reference URL link that opens another Web browser window and connects to a specified URL.
 - A PL/SQL, PL/SQL CLOB, or PL/SQL BLOB document link that displays the contents of a document generated from a PL/SQL function. Such documents can contain text, HTML, images, or application files such as PDF or RTF documents.
 - If you are using Oracle Workflow embedded in Oracle Applications, an Oracle Applications form link that drills down

to a Oracle Applications form referenced by the underlying message attribute. Depending on how the message attribute is defined, the Oracle Applications form can automatically display appropriate context information.



Attention: Attached form icons appear in a notification message only if the Worklist web page was initially launched by Oracle Applications from a menu. The Oracle Applications socket listener port must be set to the port where the form should be launched. See: Setting the Socket Listener Profile Option, *Oracle Workflow Administrator's Guide*.



Attention: The Notification System first verifies with Oracle Applications whether the recipient's responsibility has the appropriate security to open the linked form. If the responsibility is not allowed to open the form, the attached form icon is disabled and a message to that effect is displayed. Also, you cannot update information in a form that is attached in the upper frame for reference only.

When you choose the attached form icon, a launch window appears to make the socket connection. You can choose the Keep Window button to continue displaying the launch window. Otherwise, this window is automatically closed after thirty seconds.



The form that is launched appears in the Oracle Applications Navigator window on top of the browser window displaying the notification.

Note: If the form does not appear, check for error messages in the JInitiator console.

4. The Response section may look as follows:

- If a notification requires a response, but none of the responses affect the result of the notification activity, the response prompts all appear as fields and/or poplists. When you are done entering your response values, submit your response by choosing the Submit button.
- If a notification requires a response, and one of the responses becomes the result of the notification activity, then that determining response will appear last as a set of buttons to choose from as shown in the figure above. The buttons represent the possible choices to the response prompt. All other response prompts, if any, appear as fields or poplists above that prompt. When you choose a button for that last response prompt, you also submit your response for the notification.
- If a notification does not require a response, the response section indicates that. Choose Close in the Response section to close the notification so that it does not appear in your notification summary list the next time you query for open notifications.

Note: You can click on any response prompt to display more information about the response attribute.

Note: If you launch the Notification Worklist from Oracle Applications, your response section may display an attached form icon that lets you drill down to an Oracle Applications form to complete your response.



The Oracle Applications socket listener port must be set to the port where the form should be launched. See: *Setting the Socket Listener Profile Option, Oracle Workflow Administrator's Guide*.

When you choose the attached form icon, a launch window appears to make the socket connection. You can choose the Keep Window button to continue displaying the launch window. Otherwise, this window is automatically closed after thirty seconds.



The form that is launched appears in the Oracle Applications Navigator window on top of the browser window displaying the notification.

Note: If the form does not appear, check for error messages in the JInitiator console.

5. Once you submit your response, the Detail Notification page returns you to the Worklist, where the notification you just responded to now displays a status of Closed.

Note: If you revisit a Closed notification, the Response section indicates that the Response has been submitted and displays the values that were submitted as the response.

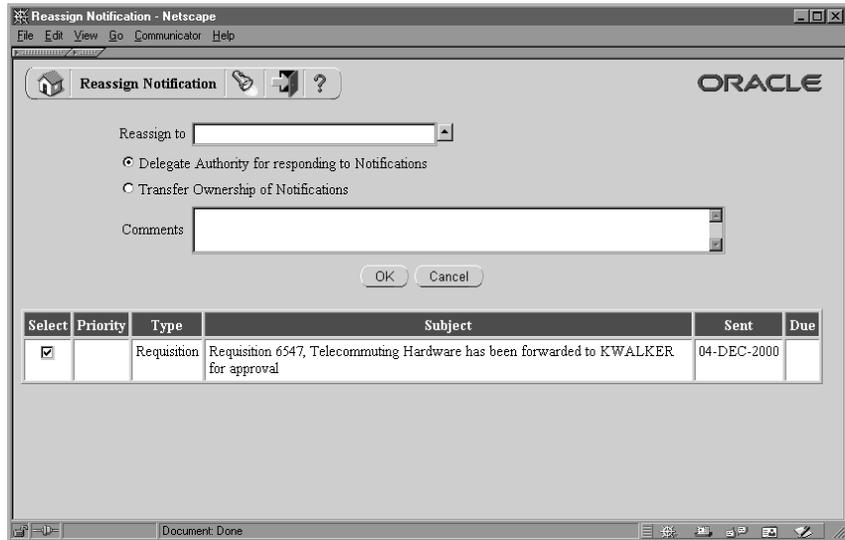
6. A Find icon in the toolbar of the Detail Notification page lets you navigate back to the Find Notifications screen at any time to search for and display other notifications.

► To Reassign a Notification to Another User

1. You can reassign a notification in one of two ways:
 - In the Worklist page, you check Select for one or more notifications and choose Reassign....
 - In the Worklist page, click on the subject link of the notification you wish to reassign. In the Detail Notification page that appears, choose Reassign... in the Response frame of the notification.



Attention: Your workflow may include a special #HIDE_REASSIGN attribute to restrict reassignment of notifications. If so, the Reassign button may not be displayed in the Response frame, and you should not reassign the notification. See: #HIDE_REASSIGN Attribute, *Oracle Workflow Developer's Guide*.



2. In the Reassign page that appears, a summary of the selected notification(s) appear towards the bottom of the screen.

Note: If you clicked on the Reassign button in the Response frame of a specific notification, you do not see a summary of selected notifications.
3. In the 'Reassign to' field, click on the up-arrow icon to display a window that lets you search for a list of roles to choose from. See: Using a List of Values: page 3 – 29.
4. After choosing a role, specify how you wish to reassign the notification. Select 'Delegate Authority for Responding to Notifications' if you want to give someone else authority to respond to the notification on your behalf. With this option, Oracle Workflow maintains that you own the notification. Or select 'Transfer Ownership of Notifications', if you want to give someone else complete ownership and responsibility of the notification.
5. Enter any comments you want to pass along to the new role. Choose Reassign. Once the notification is reassigned, the web browser returns you to your Worklist page, where the reassigned notification is no longer in your worklist.



Attention: Your workflow may include special logic called a post-notification function to verify that the role that you attempt to delegate or transfer a notification to is legitimate or to restrict reassignment of notifications altogether. If so, you may get a warning message to that effect when you attempt to

reassign a notification. See: Post-Notification Functions, *Oracle Workflow API Reference*.

Additionally, you cannot reassign a voting notification that tallies the recipients' responses. See: Voting Activity, *Oracle Workflow Developer's Guide*.

6. A Find icon in the toolbar of the Reassign page lets you navigate back to the Find Notifications screen at any time to search for and display other notifications.

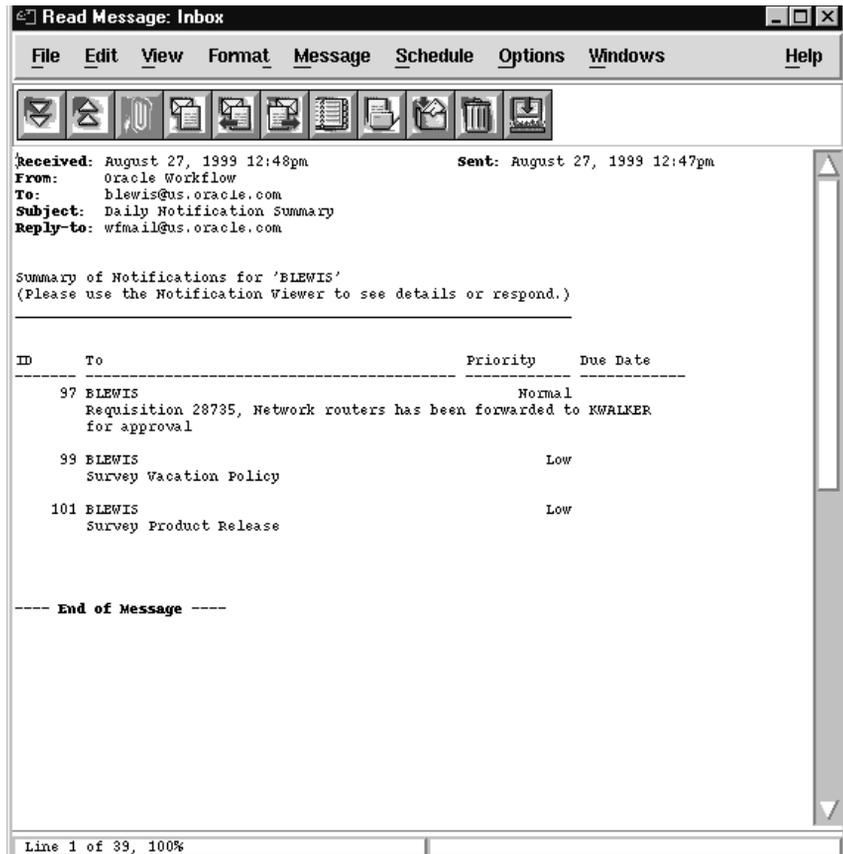
► **Using a List of Values**

1. For a field that supports a list of values, click on the field's up-arrow icon to display a list of values window.
2. In the Find field, enter search criteria and choose the Find button to retrieve a subset of values that match your criteria. You can also choose the Clear button to clear the Find field. If you do not specify any search criteria and simply choose Find, you retrieve the complete list of values.
3. Click on a value from the list to select that value and close the list of values window. The value you select populates the original field.

Reviewing a Summary of Your Notifications via Electronic Mail

You can have a summary of your workflow notifications delivered to you as a single e-mail message if your notification preference is set to 'Plain text summary mail' in the User Preferences web page. Your workflow administrator determines how frequently summary notifications are sent when setting up a notification mailer. See: Setting Up Notification Mailers, *Oracle Workflow Administrator's Guide*.

You can receive your e-mail notification summary using any e-mail reader. The following example shows a notification summary received through Netscape Messenger as the mail client.



The e-mail notification summary is based on a template defined in Oracle Workflow Builder. The standard summary identifies the recipient, notification ID, subject, priority and due date of each notification. See: *Modifying Your Message Templates, Oracle Workflow Administrator's Guide*.

It also indicates that if you wish to view the details of the notification or respond or close the notification, you should use the Notification Web page.

Defining Rules for Automatic Notification Processing

Use Oracle Workflow Automatic Notification Processing to automatically forward your notifications to another role or respond to incoming notifications with a predefined response when you are not

available to manage your notifications directly, such as when you are on vacation.

The Automatic Notification Processing web page lets you define the rules for automatic notification processing. Each rule is specific to a role and can apply to any or all messages of a specific item type and/or message name. A rule can result in one of three actions: reassigning the notification to another user, responding to or closing the notification, or simply delivering the notification to the original recipient with no further action.

Each time the Notification System sends or reassigns a notification to a role, Oracle Workflow tests the notification against that role's list of rules for the most specific match based on the criteria in the order listed below:

ROLE = *<role>* and:

1. MESSAGE_TYPE = *<type>* and MESSAGE_NAME = *<name>*
2. MESSAGE_TYPE = *<type>* and MESSAGE_NAME is null
3. MESSAGE_TYPE is null and MESSAGE_NAME is null

As soon as it finds a match, Oracle Workflow applies the rule and discontinues any further rule matching.

If a rule reassigns a notification, Oracle Workflow performs rule matching again against the new recipient role's list of rules. Oracle Workflow maintains a count of the number of times it forwards a notification to detect perpetual forwarding cycles. If a notification is automatically forwarded more than ten times, Oracle Workflow assumes a forwarding cycle has occurred and ceases executing any further forwarding rules, marking the notification as being in error.

Note: For information about the automatic routing rule pages in the Oracle Applications Framework user interface format, currently available with the version of Oracle Workflow embedded in Oracle Applications, see: *To View and Maintain Automatic Notification Processing Rules: page 3 – 51.*

► **To Define a Rule for Automatic Notification Processing**

1. Use a web browser to connect to one of two URLs.

To display the list of routing rules for your current role, enter:

```
<webagent>/wf_route.list[?user=<rolename>]
```

This URL can include an optional argument, as denoted by the square brackets []. You should omit the square brackets to pass the optional argument.

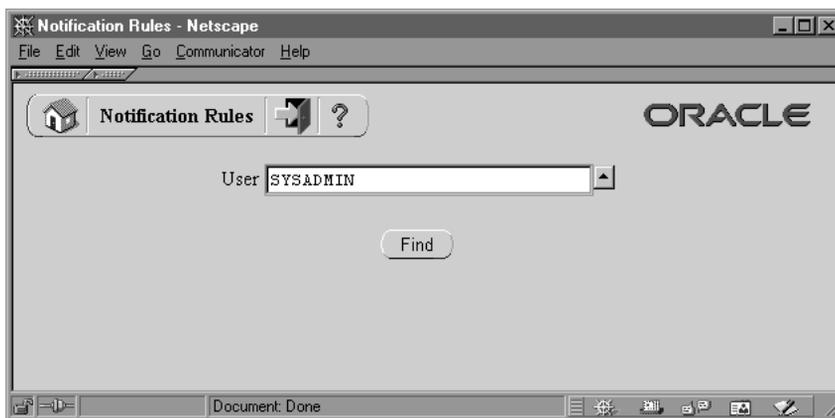
Replace the bracketed italicized text in the above URL as follows:

- *<webagent>* represents the base URL of the web agent configured for Oracle Workflow in your Web server. See: Setting Global User Preferences, *Oracle Workflow Administrator's Guide*.
- *<rolename>* represents an internal role name that you want to query routing rules for. Note, however, that you can query for roles other than your current role only if your current role has workflow administrator privileges. See: Setting Global User Preferences, *Oracle Workflow Administrator's Guide*.

If you have workflow administrator privileges, you can display a web page that lets you find the routing rules for a specified role. Enter:

```
<webagent>/wf_route.find
```

Enter the user ID of a role and choose Find.



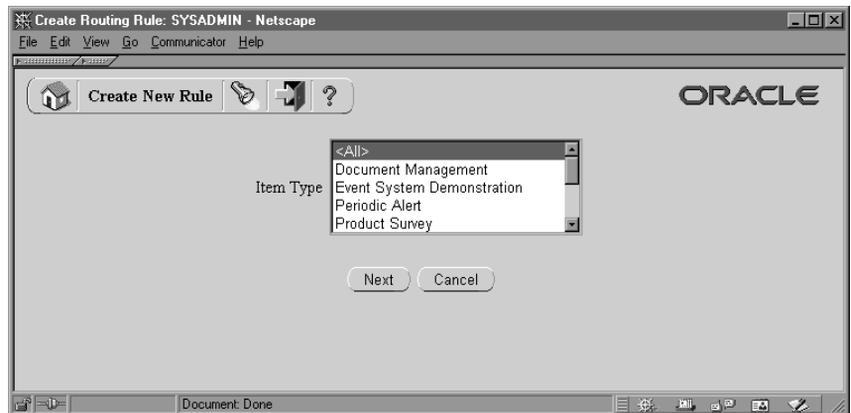
Attention: Both of these URLs access secured pages, so if you have not yet logged on as valid user in the current web session, you will be prompted to do so before the page appears.

Note: You can also access the Notification Rules web page from the Oracle Workflow home page. See: Accessing the Oracle Workflow Home Page: page 2 – 2.

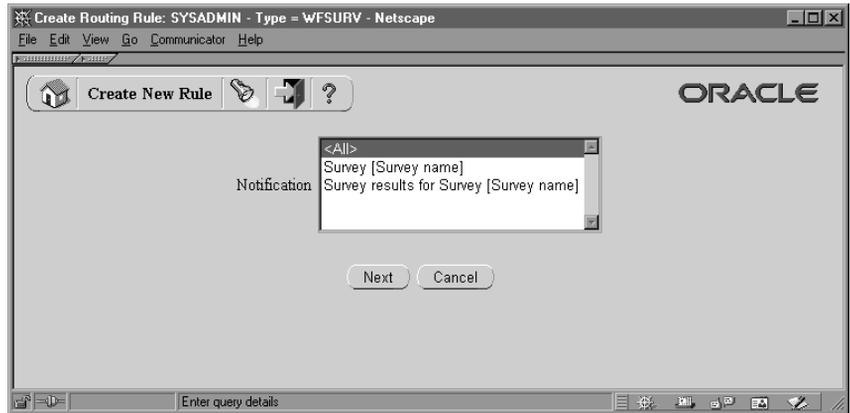
2. The Notification Rules page for the role appears, listing all existing rules for the current role. Choose Create Rule.



- In the Item Type poplist field, select the item type to which this rule applies or select <All> if you want this rule to apply to notifications associated with any item type.



- Choose Next to proceed or choose Cancel if you want to cancel this rule and return to the previous page.
- If you selected <All> as the item type to apply the rule to, then skip to step 8. If you selected a specific item type, then proceed to the next step to choose a notification from that item type to which you want your rule to apply.
- In the Notification field, select the notification message to which this rule applies or select <All> if you want this rule to apply to all notifications in the item type.



7. Choose Next to proceed or choose Cancel if you want to cancel this rule and return to the previous page.
8. The final Create New Rule page appears. The fields in this page vary depending on the item type(s) and notification(s) that you are creating this rule for. For example, if your rule pertains to all item types, you can automatically reassign all the notifications to another user, but you cannot define an automatic response to all the notifications since different notifications have different response attributes.

9. Enter values in the Start Date and End Date fields to specify the period that this rule should be active. Specify the date using the default date format of your database and specify a time using the format HH24:MI:SS if your default date format does not have a time component.

If you leave Start Date blank, the rule is effective immediately. If you leave End Date blank, the rule is effective indefinitely.



Warning: Since you can define different rules for the same notification(s) to be effective at different times, the Automatic Notification Processing web page does not prevent you from defining multiple rules for the same notification(s). You should be careful to ensure that rules for the same notification(s) do not overlap in their effective dates. If multiple rules are effective for the same notification, Oracle Workflow picks one rule at random to apply.

10. In the "Comments to include in notification" field, enter any text that you want to append to the notification when the rule is applied. The comments appear in a special "Prior comments" field when the notification is reassigned or automatically responded to.

11. Choose the action that you want this rule to perform:
 - "Reassign to"—forward the notification to a designated role.
 - "Respond"—respond to the message with a set of predefined response values.
 - "Deliver Notifications to me, regardless of any general rules"—leave the notification in the your inbox and do nothing. You can define a rule with this action to exclude a certain subset of notifications from a more encompassing rule. For example, suppose you have a rule that forwards all your notification messages to another role, but you want to exclude a subset of notifications from that rule. To accomplish this, you can define a new rule that applies only to that subset of notifications, whose action is to 'Deliver Notifications to me,...'.
12. If your rule action is "Reassign to", click on the up-arrow icon to display a window that lets you search for a role to reassign to. See: Using a List of Values: page 3 – 29.
13. After choosing a role, specify how you wish to reassign the notifications. Select 'Delegate Authority for Responding to Notifications' if you want to give the new role authority to respond to the notification on your behalf. With this option, Oracle Workflow maintains that you still own the notifications, but the recipient role of the notifications is now the role that you are reassigning your notifications to. Select 'Transfer Ownership of Notifications', if you want to give the new role complete ownership and responsibility of the notification.

 **Attention:** Your workflow administrator may implement special logic to verify that the role that you attempt to delegate or transfer the notifications to is legitimate or to restrict reassignment of notifications altogether. If so, you may get a warning message to that effect when you attempt to create a reassigning rule.
14. If your rule action is "Respond", set the values that you want to automatically respond with.
15. Choose OK to save this rule and return to the Notification Rules page to display an updated list of your role's routing rules. You can also choose Cancel at any time if you want to cancel this rule and return to the previous page.

► **To Update or Delete an Automatic Notification Processing Rule**

1. Connect to the URL for the Automatic Notification Processing web page:

`<webagent>/wf_route.list`

`<webagent>` represents the base URL of the web agent configured for Oracle Workflow in your Web server. See: Setting Global User Preferences, *Oracle Workflow Administrator's Guide*.

2. The Automatic Notification Processing page for the role appears. In the "Result of Applying Rule" column, click on the rule you wish to update.
3. In the Modify Rule page make your changes to the rule and choose OK to save your changes.

You can also choose Cancel to undo your changes and go back to the previous page.
4. To delete a rule, in the "Delete Rule" column, choose 'X' for the rule you wish to delete.

Viewing Notifications from a Web Browser for Oracle Applications

Note: The Oracle Workflow web pages are being converted to the Oracle Applications Framework user interface format. Depending on your version of Oracle Workflow and which patches you have applied, you may see Oracle Workflow web pages in the new format as well as in the previous format. The new Worklist pages are currently available for the version of Oracle Workflow embedded in Oracle Applications.

The Worklist pages let you view and respond to your notifications using a web browser. The Worklist shows basic information about your notifications, while the Advanced Worklist provides additional information as well as additional options for displaying and administering your notifications. From both versions of the Worklist, you can also reassign notifications to another user, request more information about a notification from another user, and define automatic notification routing rules.

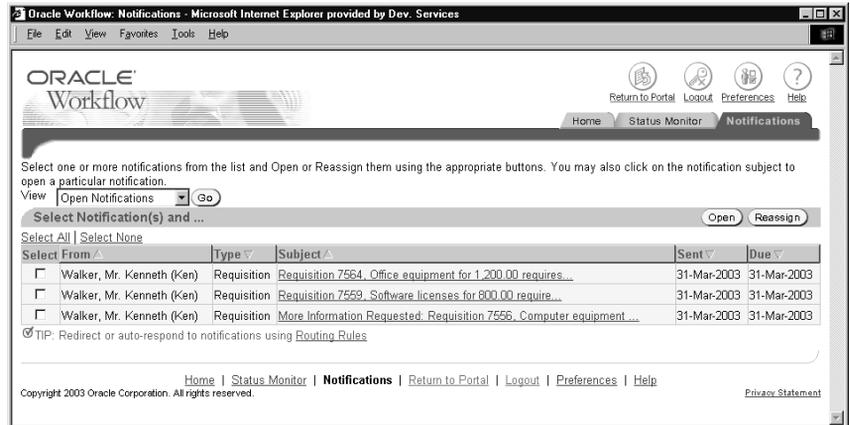
See Also

Viewing Notifications from the Personal Worklist: page 3 – 58

► **To View Notifications from the Advanced Worklist**

1. Use a web browser to navigate to the Advanced Worklist, using a responsibility and navigation path specified by your system administrator. See: Oracle Workflow User Navigation Paths: page A – 2.

You can navigate to the Advanced Worklist from other Oracle Applications Framework–based Oracle Workflow web pages by choosing the Notifications tab or selecting the Notifications link at the bottom of the page, if the page includes these links.



2. To specify which notifications to display in the Worklist, select the type of notifications you want from the View pull-down menu and select Go. You can choose to view:
 - Open Notifications
 - FYI Notifications
 - To Do Notifications
 - All Notifications
 - Notifications From Me
3. The Advanced Worklist shows the following information for each notification:
 - From—the role from which the notification was sent. This column is displayed when you view notifications sent to you.
 - If this notification was reassigned through the Worklist web pages, the From column shows the user who reassigned the notification to the current recipient.
 - If this notification is a request for more information, the From column shows the user who sent the request.
 - If this notification is a response providing more information, the From column shows the user who sent the response.
 - Additionally, the From role for a notification may be set by special logic in the workflow process. See: #FROM_ROLE Attribute, *Oracle Workflow Developer's Guide*.
 - To—the role to which the notification was sent. This column is displayed when you view notifications sent from you.

- Type—display name of the item type to which the workflow process that sent the notification belongs.
- Subject—a description of the notification.
- Sent—date when the notification was delivered.
- Due—date by which the notification should be completed.
- Status—open, closed, or canceled status of the notification. This column is displayed when you view all notifications.

Select the From, To, Type, Subject, Sent, Due, or Status column heading to sort the list by that column. By default, the list is sorted by sent date in descending order and then by subject in ascending order.

4. To collectively reassign a group of notifications, select the notifications you want and select the Reassign button, the Delegate button, or the Transfer button.
 - The Reassign button appears if you have access to reassign notifications to another user either by delegating the notifications or by transferring complete ownership of the notifications.
 - The Delegate button appears if you only have access to delegate the notifications.
 - The Transfer button appears if you only have access to transfer ownership of the notifications.

See: To Reassign a Notification to Another User: page 3 – 47 and Setting the FND: Notification Reassign Mode Profile Option, *Oracle Workflow Administrator's Guide*.

Note: Your workflow may include special logic to restrict reassignment of notifications. If any of the notifications that you selected are restricted in this way, Oracle Workflow displays an error message when you select the Reassign, Delegate, or Transfer button. In this case you should deselect the restricted notifications before performing the reassignment. See: #HIDE_REASSIGN Attribute, *Oracle Workflow Developer's Guide*.

Additionally, you cannot reassign a voting notification that tallies the recipients' responses. See: Voting Activity, *Oracle Workflow Developer's Guide*.

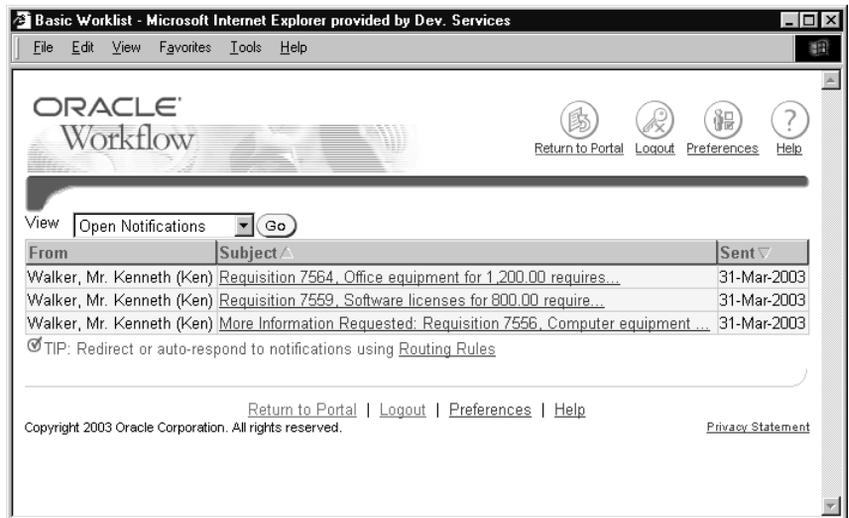
5. You can navigate to the full details of any notification and act on the notification by clicking on the notification's Subject link or by selecting the notification and then choosing Open.

If you select more than one notification to open, only one notification is displayed at a time. You can navigate among the open notifications by selecting the Next or Back buttons in the Notification Details page.

6. To define notification routing rules, select the routing rules link that follows the list of notifications. See: To View and Maintain Automatic Notification Processing Rules: page 3 – 51.

► To View Notifications from the Worklist

1. Use a web browser to navigate to the Worklist, using a responsibility and navigation path specified by your system administrator. See: Oracle Workflow User Navigation Paths: page A – 2.



2. To specify which notifications to display in the Worklist, select the type of notifications you want from the View pull-down menu and select Go. You can choose to view:
 - Open Notifications
 - Notifications From Me
3. The basic Worklist shows the following information for each notification:
 - From—the role from which the notification was sent. This column is displayed when you view notifications sent to you.

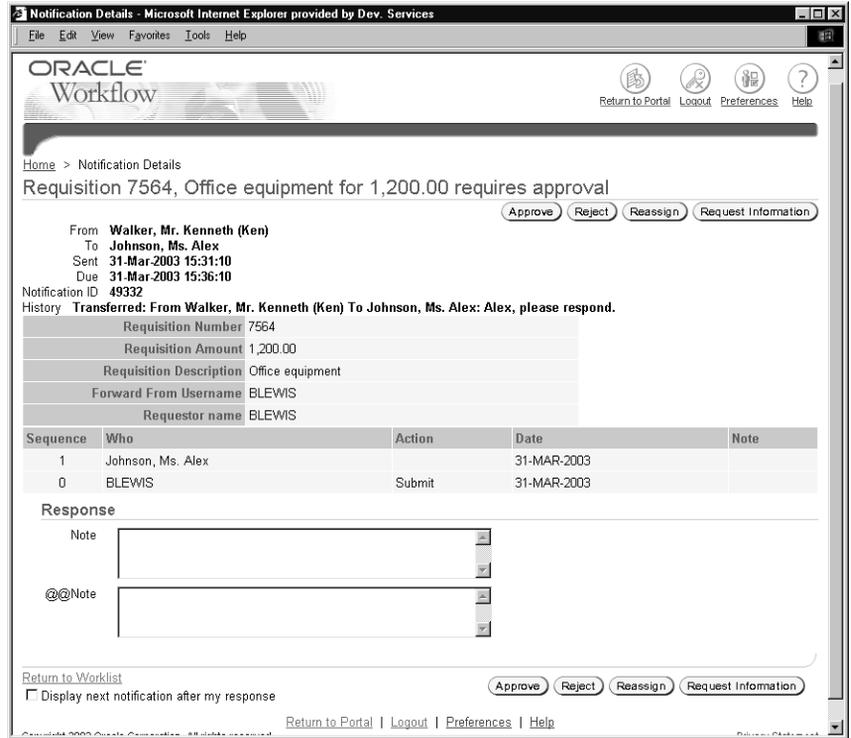
- If this notification was reassigned through the Worklist web pages, the From column shows the user who reassigned the notification to the current recipient.
- If this notification is a request for more information, the From column shows the user who sent the request.
- If this notification is a response providing more information, the From column shows the user who sent the response.
- Additionally, the From role for a notification may be set by special logic in the workflow process. See: #FROM_ROLE Attribute, *Oracle Workflow Developer's Guide*.
- To—the role to which the notification was sent. This column is displayed when you view notifications sent from you.
- Subject—a description of the notification.
- Sent—date when the notification was delivered.

Select the From, To, Subject, or Sent column heading to sort the list by that column. By default, the list is sorted by sent date in descending order and then by subject in ascending order.

4. You can navigate to the full details of any notification and act on the notification by clicking on the notification's Subject link.
5. To define notification routing rules, select the routing rules link that follows the list of notifications. See: *To View and Maintain Automatic Notification Processing Rules*: page 3 – 51.

► **To View the Details of a Notification**

1. Navigate to the Notification Details page.



2. In addition to general information, the notification header may also provide a history of comments forwarded from other workflow users who received notifications earlier in the workflow process. The History section displays any requests for more information and responses to those requests. The most recent History comment is marked with an asterisk icon.

Also, the notification header may include additional header attributes that display key information about the notification. See: *Header Attributes, Oracle Workflow Developer's Guide.*

In Oracle Applications, non-structured data such as images, spreadsheets, or video can be linked to structured application data, including Oracle Workflow notifications. If a notification includes such Oracle Applications attachments, the notification header displays an Attachment(s) heading with a View link. Select this link to display a detail page that shows all Oracle Applications attachments associated with the notification and lets you view the attached data. See: *About Attachments, Oracle Applications User's Guide* and *Attachments Table* in the Oracle Self-Service Web Applications online help.

A notification may also include a message body, a References section, and a Response section.

3. The message body displays the information of which you are being notified. The message body may include embedded links to additional information sources pertinent to the notification. A reference URL link connects to a specified URL, either in the same web browser window or in a new window, depending on the notification.
4. The References section may include attachment icons. These icons link to additional information sources for the notification. There are three types of attachment links:
 - A reference URL link that opens another Web browser window and connects to a specified URL.
 - A PL/SQL, PL/SQL CLOB, or PL/SQL BLOB document link that displays the contents of a document generated from a PL/SQL function. Such documents can contain text, HTML, images, or application files such as PDF or RTF documents.
 - An Oracle Applications form link that drills down to an Oracle Applications form or Oracle Self-Service Web Applications page referenced by the underlying message attribute. Depending on how the message attribute is defined, the form or page can automatically display appropriate context information.



Attention: Attached form icons appear in a notification message only if the Worklist web page was initially launched by Oracle Applications from a menu.

The Notification System first verifies with Oracle Applications whether the recipient has a responsibility with the appropriate security to open the linked form. If the recipient is not allowed to open the form, the attached form icon is not displayed. Also, you cannot update information in a form that is attached for reference only.

5. If you want to view your next notification in the Notification Details page after responding to this notification, select the Display Next Notification After My Response check box. Otherwise, Oracle Workflow displays the Worklist after you respond to a notification.
6. Use the Response section to act on the notification.
 - If a notification requires a response, but none of the responses affect the result of the notification activity, the response prompts all appear as fields or pull-down menus. After you finish entering your response values, submit your response by

choosing the Submit button. After you submit your response, the status of the notification changes to Closed.

- If a notification requires a response, and one of the responses becomes the result of the notification activity, then that determining response will appear last. All other response prompts, if any, appear as fields or pull-down menus before that prompt.
 - If there are four or fewer possible result values for the final response prompt, those values appear as a set of buttons. After you finish entering your response values for any other response prompts, choose the button for the result value you want. When you choose one of these buttons, you also submit your response to the notification.
 - If there are more than four result values to choose from for the final response prompt, those values appear in a pull-down menu with a Submit button. After you finish entering your response values for any other response prompts, select the result value you want from the pull-down menu and submit your response by choosing the Submit button.

After you submit your response, the status of the notification changes to Closed.

- If you launch the Notification Worklist from Oracle Applications, your Response section may display an attached form icon that lets you drill down to an Oracle Applications form to complete your response.



- If you revisit a notification to which you have already responded, the Response section indicates that the response has been submitted and displays the response values that were submitted.
- If a notification does not require a response, the Response section indicates that. Choose the Close button in the Response section to close the notification so that it does not appear in your worklist the next time you view your open notifications.

- If you want another user to respond to the notification instead of you, choose the Reassign button, the Delegate button, or the Transfer button in the Response section.
 - The Reassign button appears if you have access to reassign a notification to another user either by delegating the notification or by transferring complete ownership of the notification.
 - The Delegate button appears if you only have access to delegate the notification.
 - The Transfer button appears if you only have access to transfer ownership of the notification.

See: To Reassign a Notification to Another User: page 3 – 47 and Setting the FND: Notification Reassign Mode Profile Option, *Oracle Workflow Administrator's Guide*.



Attention: Your workflow may include special logic to restrict reassignment of notifications. If so, the Reassign button, Delegate button, or Transfer button may not be displayed in the Response section, and you should not reassign the notification. See: #HIDE_REASSIGN Attribute, *Oracle Workflow Developer's Guide*.

Additionally, you cannot reassign a voting notification that tallies the recipients' responses. See: Voting Activity, *Oracle Workflow Developer's Guide*.

- To request more information about this notification from another user or role, choose the Request Information button in the Response section. See: To Request More Information From Another User: page 3 – 50.



Attention: Your workflow may include special logic to restrict requesting more information on notifications. If so, the Request Information button is not displayed in the Response section. See: #HIDE_MOREINFO Attribute, *Oracle Workflow Developer's Guide*.

- If another user sent you this notification with a request for more information, the Response section displays the user who made the request and the request details. Enter the information you want to provide in the Response field and choose the Submit button to submit your response.
7. If this notification requires a password-based electronic signature, a confirmation page appears after you submit your response. This page displays notification header information and the response

values that you entered to let you review the response you are signing. To affix your electronic signature to your response, enter your Oracle Applications user name and password and select the Submit button. This electronic signature is analogous to your written signature. See: #WF_SIG_POLICY Attribute, *Oracle Workflow Developer's Guide*.

You can also select the Cancel button to return to the Notification Details page without completing your response. In this case the notification remains open in your Worklist until you submit a signed response.

8. If you selected more than one notification to open from the Advanced Worklist, you can navigate among the open notifications by selecting the Next or Back buttons.
9. You can also select the Return to Worklist link to navigate back to the Worklist.

► To Reassign a Notification to Another User

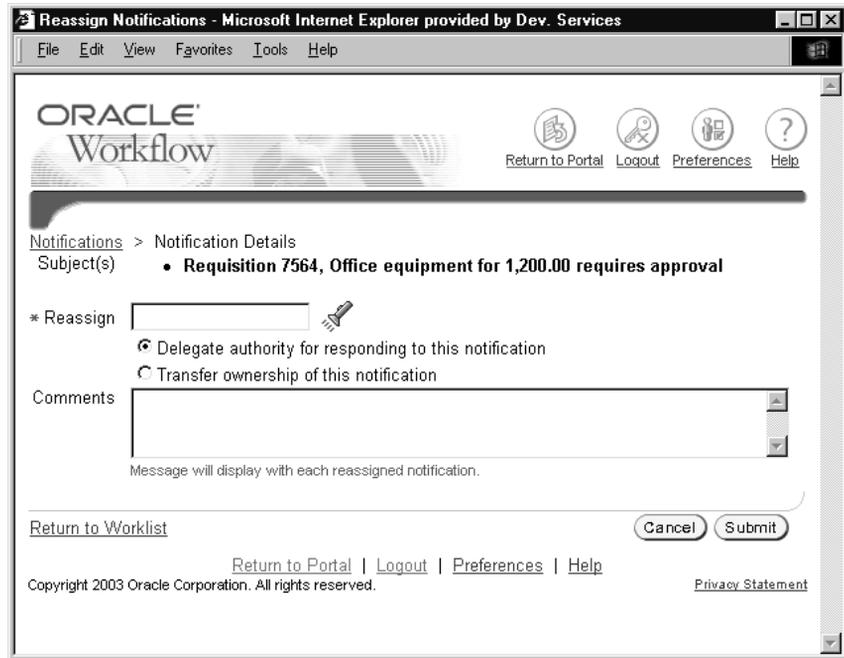
1. Navigate to the Reassign Notifications page by one of the following methods.
 - In the Advanced Worklist, select one or more notifications and choose the Reassign button, the Delegate button, or the Transfer button.
 - In the Notification Details page for a single notification, choose the Reassign button, the Delegate button, or the Transfer button in the Response section of the notification.



Attention: Your workflow may include special logic to restrict reassignment of notifications. If so, the Reassign button, Delegate button, or Transfer button may not be displayed in the Response section of the Notification Details page, and you should not reassign the notification. Also, if any of the notifications that you selected in the Advanced Worklist are restricted in this way, Oracle Workflow displays an error message when you select the Reassign, Delegate, or Transfer button. In this case you should deselect the restricted notifications before performing the reassignment. See: #HIDE_REASSIGN Attribute, *Oracle Workflow Developer's Guide*.

Additionally, you cannot reassign a voting notification that tallies the recipients' responses. See: Voting Activity, *Oracle Workflow Developer's Guide*.

The Reassign Notifications page displays the subject of each notification that you selected to reassign.



- Oracle Workflow displays either a Reassign field, a Delegate field, or a Transfer field, depending on the reassign modes to which you have access. In this field, enter the user to whom you want to reassign the notification. Select the field's search icon to display a list of values from which to choose. See: Using a List of Values: page 3 – 49 and Setting the FND: Notification Reassign Mode Profile Option, *Oracle Workflow Administrator's Guide*.



Attention: Your workflow may include special logic to restrict the users to whom you can reassign the notification. If so, only users who are valid for reassignment appear in the list of values. See: #WF_REASSIGN_LOV Attribute, *Oracle Workflow Developer's Guide*.

- If you have access either to delegate or transfer notifications, select the option you want to specify how you want to reassign the notification.
 - "Delegate authority for responding to this notification" – Select this option if you want to give the new user authority to respond to the notification on your behalf, but you want to retain

ownership of the notification yourself. For example, a manager might delegate all vacation scheduling approvals to an assistant.

- "Transfer ownership of this notification" – Select this option if you want to give the new user complete ownership of and responsibility for the notification. For example, use this option if you should not have received the notification and you want to send it to the correct recipient or to another recipient for resolution. A transfer may have the effect of changing the approval hierarchy for the notification. For example, a manager might transfer a notification about a certain project to another manager who now owns that project.

Note: If you only have access to delegate notifications, Oracle Workflow automatically uses the delegate option when you reassign notifications. Similarly, if you only have access to transfer notifications, Oracle Workflow automatically uses the transfer option when you reassign notifications.

4. Enter any comments you want to send with the notification to the new user. If you are reassigning more than one notification, your comments will be included with each notification.
5. Select the Submit button. You can also select the Cancel button to return to the previous page without reassigning the notification.



Attention: Your workflow may include special logic to verify that the role that you attempt to delegate or transfer a notification to is legitimate or to restrict reassignment of notifications altogether. If so, you may get a warning message to that effect when you attempt to reassign a notification. See: Post-Notification Functions, *Oracle Workflow API Reference*.

6. You can also select the Return to Worklist link to navigate back to the Worklist.

► Using a List of Values

1. For a field that supports a list of values, select the field's search icon to display a Search and Select page.
2. In the Search region, select the filter to search by, depending on the type of value you are searching for. Then enter a search value in the text field and select the Go button. If you do not specify a search value, Oracle Workflow retrieves the complete list of values.
3. The Results region displays the list of values that match your search criteria. Select the value you want and choose the Select button. The value you selected populates the original field. You can

also choose the Cancel button in the Search and Select page to return to the previous page without selecting a value.

► **To Request More Information From Another User**

1. Navigate to the Request More Information page.

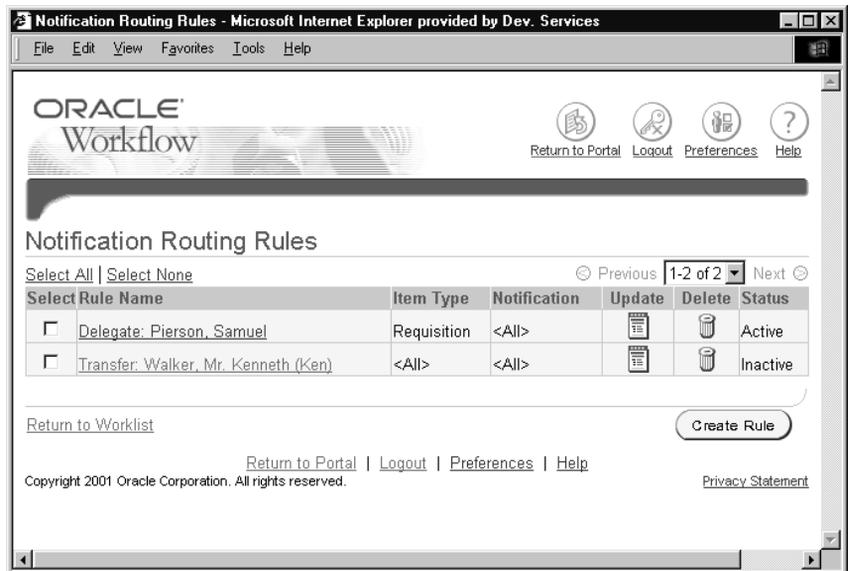
The screenshot shows a web browser window with the title "Request More Information - Microsoft Internet Explorer provided by Dev. Services". The page header includes the Oracle Workflow logo and navigation links: "Return to Portal", "Logout", "Preferences", and "Help". The main content area is titled "Notification Details" and shows the subject "Requisition 7564, Office equipment for 1,200.00 requires approval". Under the "Request More Information From" section, the "Workflow Participant" radio button is selected, and a dropdown menu is visible. The "Any User" option is also present with a search icon. Below this is a large text area for "Information Requested". At the bottom of the form are "Cancel" and "Submit" buttons. The footer contains the text "Return to Portal | Logout | Preferences | Help", "Copyright 2003 Oracle Corporation. All rights reserved.", and a "Privacy Statement" link.

2. Use the Request More Information From option to specify the user or role from whom you want to request information.
 - To specify another user or role previously involved in this workflow process, select the Workflow Participant option and select the user or role you want from the pull-down menu.
 - To specify any user listed in the directory service, select the Any User option and enter the user you want. Select the field's search icon to display a list of values from which to choose. See: Using a List of Values: page 3 – 49.
3. Enter details about what information you are requesting in the Information Requested field.
4. Select the Submit button to send your request to the specified user. You can also select the Cancel button to return to the previous page without sending your request.

5. After you request more information for a notification, that notification does not appear in your Worklist as an open notification until the user you specified responds to your request. However, you can still review the notification while your request is pending, by choosing to view Notifications From Me in either the Worklist or the Advanced Worklist and then opening the Notification Details page for the notification you want.
 - If you do not want to wait any longer for the additional information you requested, you can respond to the notification using the Response section of the Notification Details page. In this case, your pending request for more information is canceled.
 - If you want to request more information from a different user, you can submit a new request using the Request Information button in the Response section of the Notification Details page. In this case, your initial request is replaced by the new request, and only the user to whom you sent the new request can respond with more information.

► **To View and Maintain Automatic Notification Processing Rules**

1. Navigate to the Notification Routing Rules page by navigating to either the Advanced Worklist or Worklist and selecting the routing rules link that follows the list of notifications.



The Notification Routing Rules page displays all existing rules for the role you are logged in as. For each rule, the list displays the rule name, the item type and notification to which the rule applies, and the rule status based on its effective dates.

2. To update a rule, select the rule name link in the Rule Name column or select the update icon in the Update column for that rule. See: To Create or Update a Rule for Automatic Notification Processing: page 3 – 52.
3. To delete a rule, select the delete icon in the Delete column for that rule.
4. To create a new rule, select the Create Rule button. See: To Create or Update a Rule for Automatic Notification Processing: page 3 – 52.
5. You can also select the Return to Worklist link to navigate back to the Worklist.

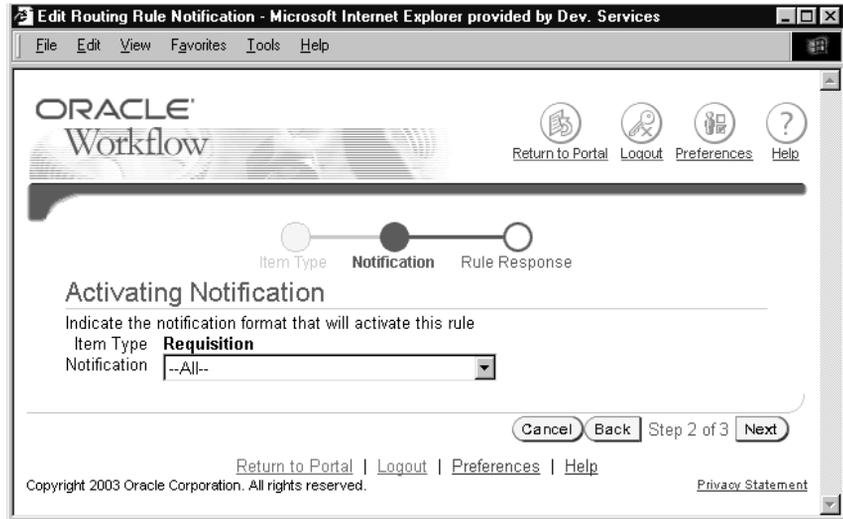
Defining Rules for Automatic Notification Processing: page 3 – 30

► **To Create or Update a Rule for Automatic Notification Processing**

1. Navigate to the Notification Routing Rules page and choose to create or update a rule.
 - If you choose to create a new rule, the Activating Type of Notification page appears first. Continue with step 2.
 - If you choose to update an existing rule, the Rule Response page appears. Skip to step 6.
2. In the the Activating Type of Notification page, select the item type to which this rule applies or select All if you want this rule to apply to notifications associated with any item type. The list of values for the Item Type field displays those item types for which you have previously received at least one notification.



3. Choose the Next button to proceed. You can also select the Return to Routing Rules link to return to the previous page without creating the rule.
 - If you selected All as the item type for the rule, the Rule Response page appears. Skip to step 6.
 - If you selected a specific item type, the Activating Notification page appears. Continue with step 4.
4. In the the Activating Notification page, select the notification message to which this rule applies or select All if you want this rule to apply to all notifications in the selected item type.



5. Choose the Next button to proceed. You can also choose Cancel to return to the Worklist without creating the rule, or choose Back to return to the previous page.
6. If you choose to update a rule from the Notification Routing Rules page, choose All in the Activating Type of Notification page, or choose a notification in the Activating Notification page, the Rule Response page appears. The fields in this page vary depending on the item type(s) and notification(s) to which this rule applies. For example, if your rule applies to all item types, you can automatically reassign all the notifications to another user, but you cannot define an automatic response to all the notifications since different notifications may have different response attributes.

ORACLE[®] Workflow

Return to Portal Logout Preferences Help

Item Type Notification **Rule Response**

Rule Response

Complete the form below to set up the proper response for the rule.

Item Type **Requisition**

Notification **Requisition ..., ... for ... requires approval**

* Start Date

(example: dd-MMM-yyyy)

End Date

(example: dd-MMM-yyyy)

Message

Comments will display with each routed notification

Reassign

Delegate authority for responding to this notification

Transfer ownership of this notification

Respond @Note

Note

Action

Deliver notifications to me regardless of any general rules

Cancel Back Step 3 of 3 Submit

- Enter values in the Start Date and End Date fields to specify the period that this rule should be active. If you leave the Start Date blank, the rule is effective immediately. If you leave the End Date blank, the rule is effective indefinitely.



Attention: Since you can define different rules for the same notification(s) to be effective at different times, Oracle Workflow allows you to define multiple rules for the same notification(s). You should be careful to ensure that rules for the same notification(s) do not overlap in their effective dates. If multiple rules are effective for the same notification, Oracle Workflow picks one rule at random to apply.

- In the Message field, enter any text that you want to append to the notification when the rule is applied. The comments appear in a

special "Prior comments" field when the notification is reassigned or automatically responded to.

9. Choose the action that you want this rule to perform:
 - "Reassign" – Forward the notification to a designated user.
 - "Respond" – Respond to the message with a set of predefined response values.
 - "Deliver notifications to me regardless of any general rules" – Leave the notification in your Worklist with no automatic processing. You can define a rule with this action to exclude a certain subset of notifications from a more encompassing rule. For example, suppose you have a rule that reassigns all your notification messages to another user, but you want to exclude a subset of notifications from that rule. To accomplish this, you can define a new rule that applies only to that subset of notifications, whose action is "Deliver notifications to me...".
10. If your rule action is "Reassign", enter the user to whom you want to reassign the notifications. Select the field's search icon to display a list of values from which to choose. See: Using a List of Values: page 3 – 49.

Then specify how you want to reassign the notifications.

- "Delegate authority for responding to this notification" – Select this option if you want to give the new user authority to respond to the notification on your behalf, but you want to retain ownership of the notification yourself. For example, a manager might delegate all vacation scheduling approvals to an assistant.
- "Transfer ownership of this notification" – Select this option if you want to give the new user complete ownership of and responsibility for the notification. For example, use this option if you should not have received the notification and you want to send it to the correct recipient or to another recipient for resolution. A transfer may have the effect of changing the approval hierarchy for the notification. For example, a manager might transfer a notification about a certain project to another manager who now owns that project.



Attention: Your workflow administrator may implement special logic to verify that the role that you attempt to delegate or transfer the notifications to is legitimate or to restrict reassignment of notifications altogether. If so, you may get a warning message to that effect when you attempt to create a reassigning rule.

Additionally, you cannot reassign a voting notification that tallies the recipients' responses. See: *Voting Activity, Oracle Workflow Developer's Guide*.

11. If your rule action is "Respond", set the values that you want to automatically respond with.
12. Choose Submit to save this rule. You can also choose Cancel to return to the Worklist without creating or updating the rule, or, if you are creating a new rule, you can choose Back to return to the previous page.

Defining Rules for Automatic Notification Processing: page 3 – 30

Viewing Notifications from the Personal Worklist

Note: The Personal Worklist is currently available only for the version of Oracle Workflow embedded in Oracle Applications. Before you can access the Personal Worklist, your system administrator must add it to the menu for an Oracle Applications responsibility that is assigned to you. See: *Adding Worklist Functions to User Responsibilities, Oracle Workflow Administrator's Guide*.

The Personal Worklist lets you choose which notifications to display in your Worklist and what information to display for those notifications. In addition to the preconfigured worklist viewing options provided by Oracle Workflow, you can create personal worklist views by defining a set of filtering criteria that determine what types of notifications and what notification properties are included in the display. Alternatively, you can perform one-time searches to locate notifications you want to view. You can also save the search criteria as a personal worklist view to repeat the same search later.

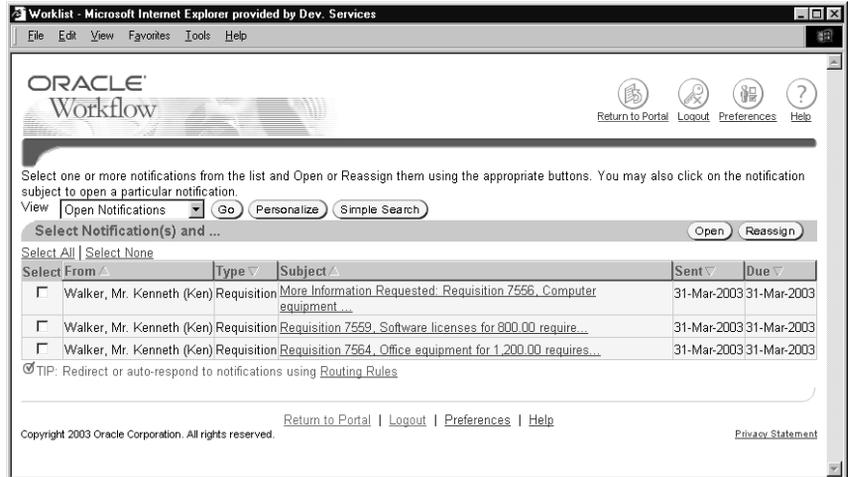
When viewing notifications from the Personal Worklist, you can respond to your notifications, reassign notifications to another user, request more information about a notification from another user, and define automatic notification routing rules.

See Also

Viewing Notifications from a Web Browser for Oracle Applications:
page 3 – 38

► To View Notifications from the Personal Worklist

1. Use a web browser to navigate to the Personal Worklist, using a responsibility and navigation path specified by your system administrator.



2. To perform a one-time search to locate notifications that match your criteria, select the Simple Search button. From the Simple Search page, you can also navigate to the Advanced Search page. See: To Perform a Simple Search for Notifications: page 3 – 61.
3. To specify which notifications to display in the Worklist, select the type of notifications you want from the View pull-down menu and select Go. Oracle Workflow provides the following preconfigured views:

- All Notifications
- FYI Notifications
- Notifications From Me
- Open Notifications
- To Do Notifications

You can also create your own personalized views to display notifications that match criteria that you specify. To maintain your personalized views, select the Personalize button. See: To View and Maintain Personal Worklist Views: page 3 – 68.

4. The Personal Worklist shows the following information for each notification:
 - From—the role from which the notification was sent. This column is displayed when you view notifications sent to you.
 - If this notification was reassigned through the Worklist web pages, the From column shows the user who reassigned the notification to the current recipient.

- If this notification is a request for more information, the From column shows the user who sent the request.
 - If this notification is a response providing more information, the From column shows the user who sent the response.
 - Additionally, the From role for a notification may be set by special logic in the workflow process. See: #FROM_ROLE Attribute, *Oracle Workflow Developer's Guide*.
- To—the role to which the notification was sent. This column is displayed when you view notifications sent from you.
 - Type—display name of the item type to which the workflow process that sent the notification belongs.
 - Subject—a description of the notification.
 - Sent—date when the notification was delivered.
 - Due—date by which the notification should be completed.
 - Status—open, closed, or canceled status of the notification. This column is displayed when you view all notifications.

Select the From, To, Type, Subject, Sent, Due, or Status column heading to sort the list by that column. By default, the list is sorted by sent date from most recent to oldest, and then by subject in alphabetical order.

5. To collectively reassign a group of notifications, select the notifications you want and select the Reassign button. See: To Reassign a Notification to Another User: page 3 – 47.
6. To collectively reassign a group of notifications, select the notifications you want and select the Reassign button, the Delegate button, or the Transfer button.
 - The Reassign button appears if you have access to reassign notifications to another user either by delegating the notifications or by transferring complete ownership of the notifications.
 - The Delegate button appears if you only have access to delegate the notifications.
 - The Transfer button appears if you only have access to transfer ownership of the notifications.

See: To Reassign a Notification to Another User: page 3 – 47 and Setting the FND: Notification Reassign Mode Profile Option, *Oracle Workflow Administrator's Guide*.

Note: Your workflow may include special logic to restrict reassignment of notifications. If any of the notifications that you selected are restricted in this way, Oracle Workflow displays an error message when you select the Reassign, Delegate, or Transfer button. In this case you should deselect the restricted notifications before performing the reassignment. See: #HIDE_REASSIGN Attribute, *Oracle Workflow Developer's Guide*.

Additionally, you cannot reassign a voting notification that tallies the recipients' responses. See: Voting Activity, *Oracle Workflow Developer's Guide*.

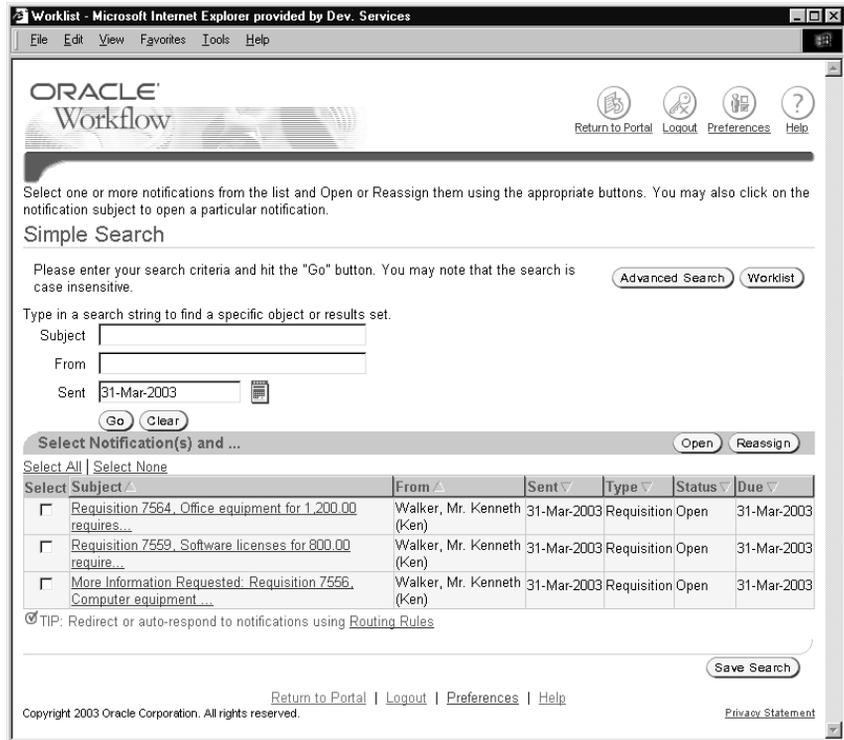
7. You can navigate to the full details of any notification and act on the notification by clicking on the notification's Subject link or by selecting the notification and then choosing Open. See: To View the Details of a Notification: page 3 – 42.

If you select more than one notification to open, only one notification is displayed at a time. You can navigate among the open notifications by selecting the Next or Back buttons in the Notification Details page.

8. To define notification routing rules, select the routing rules link that follows the list of notifications. See: To View and Maintain Automatic Notification Processing Rules: page 3 – 51.

► **To Perform a Simple Search for Notifications**

1. Navigate to the Simple Search page.



2. To locate specific notifications, enter your search criteria. The search options are:
 - Subject – Enter the subject line of the notification you want to display. You can enter a partial value to search for notifications whose subjects contain that value. This field is case insensitive.
 - From – Enter the role from which the notifications you want to display were sent. You can enter a partial value to search for notifications whose from roles contain that value. This field is case insensitive.
 - Sent – Enter the date when the notifications you want to display were delivered, using the date format you chose in your Oracle E-Business Suite general preferences. Select the field's calendar icon to display a calendar from which you can select a date.
3. Select the Go button to perform your search. You can also select the Clear button to clear the search option fields and enter new search criteria.

4. The Simple Search page displays the notifications that match your search criteria. For each notification, the list displays the following information:
 - From – the role from which the notification was sent.
 - If this notification was reassigned through the Worklist web pages, the From column shows the user who reassigned the notification to the current recipient.
 - If this notification is a request for more information, the From column shows the user who sent the request.
 - If this notification is a response providing more information, the From column shows the user who sent the response.
 - Additionally, the From role for a notification may be set by special logic in the workflow process. See: #FROM_ROLE Attribute, *Oracle Workflow Developer's Guide*.
 - Type – display name of the item type to which the workflow process that sent the notification belongs.
 - Subject – a description of the notification.
 - Sent – date when the notification was delivered.
 - Due – date by which the notification should be completed.
 - Status – open, closed, or canceled status of the notification.

Select the From, Type, Subject, Sent, Due, or Status column heading to sort the list by that column. By default, the list is sorted by sent date from most recent to oldest and then by subject in alphabetical order.

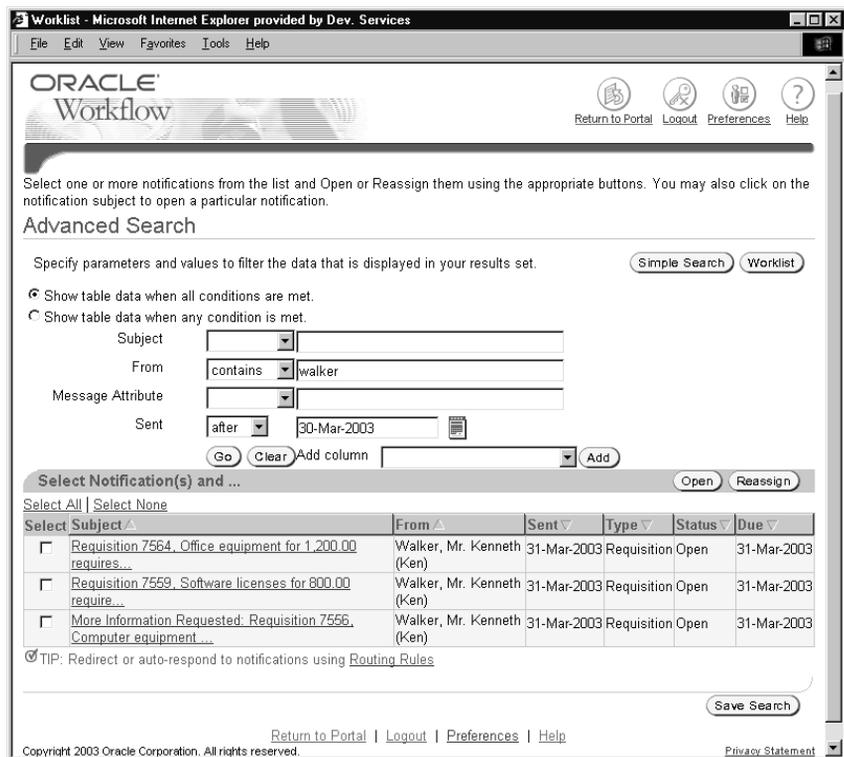
5. To collectively reassign a group of notifications, select the notifications you want and select the Reassign button. See: *To Reassign a Notification to Another User: page 3 – 47*.
6. You can navigate to the full details of any notification and act on the notification by clicking on the notification's Subject link or by selecting the notification and then choosing Open. See: *To View the Details of a Notification: page 3 – 42*.

If you select more than one notification to open, only one notification is displayed at a time. You can navigate among the open notifications by selecting the Next or Back buttons in the Notification Details page.
7. To define notification routing rules, select the routing rules link that follows the list of notifications. See: *To View and Maintain Automatic Notification Processing Rules: page 3 – 51*.

8. To save your current search criteria as a personalized view for the worklist, select the Save Search button. See: To Create or Update a Personal Worklist View: page 3 – 69.
9. You can also select the Advanced Search button to perform a search with more complex criteria, or select the Worklist button to navigate back to the Worklist. See: To Perform an Advanced Search for Notifications: page 3 – 64.

► **To Perform an Advanced Search for Notifications**

1. Navigate to the Advanced Search page.



2. Specify how you want to apply search criteria to locate specific notifications.
 - "Show table data when all conditions are met" – Select this option to locate only notifications that match all your search criteria.

- "Show table data when any condition is met" – Select this option to locate all notifications that match at least one of your search criteria.
3. Enter the search criteria you want to use to locate notifications. The following search options are displayed by default:
- Subject
 - From
 - Message Attribute
 - Sent

To display additional search options, select the notification property you want from the Add Column pull-down menu and select the Add button.

Note: You can choose to display more than one search option of the same type if you want to apply several search criteria to the same notification property. For example, if you want to search for notifications that were sent between two particular dates, you can display two Sent search options. Set one option to search for all notifications sent after the first date, and set the other option to search for all notifications sent before the second date. If you choose "Show table data when all conditions are met", then the search will display notifications that match both search criteria, with sent dates falling in between the two dates that you specified.

4. For each search option, select a filter operator and then enter a filter value to specify the notifications you want to display.

For the `is` and `is not` filter operators, you should enter a complete filter value that you want to match or exclude, respectively. For the other filter operators, you can enter a partial value, unless you are using the Sent, Due, and Closed search options, which always require a complete date in the date format you chose in your Oracle E-Business Suite general preferences. The filter value fields for all search options are case insensitive.

If you leave the filter operator and filter value blank for a search option, that option will not be included in the search.

Note: The `greater than`, `less than`, `after`, and `before` filter operators are not inclusive. For example, a search on the Sent option with the `after` operator displays only notifications sent after the date you specify, not notifications sent on that date itself.

- Subject – Enter the subject line of the notifications.

- From – Enter the role from which the notifications were sent.
- Message Attribute – Enter the value of a message attribute belonging to the notification. Message attributes hold dynamic content that is determined by the specific context in which a notification is sent. For example, a notification in a requisition workflow might have a message attribute for the requisition amount. Message attribute values can be numbers, dates, or text. This search option supports the filter operators `is` or `contains`.
- Sent – Enter the date when the notifications were delivered, using the date format you chose in your Oracle E-Business Suite general preferences. Select the field's calendar icon to display a calendar from which you can select a date.
- Type – Enter the display name of the item type to which the workflow process that sent the notification belongs.
- Status – Enter `open`, `closed`, or `canceled` as the notification status. This search option supports the filter operators `is`, `is not`, or `contains`.
- To – Enter the role to which the notifications were sent.
- Information Requested From – Enter the role to which notifications that are requests for more information were sent.
- Due – Enter the date by which the notifications should be completed, using the date format you chose in your Oracle E-Business Suite general preferences. Select the field's calendar icon to display a calendar from which you can select a date.
- Closed – Enter the date when the notifications were closed or canceled, using the date format you chose in your Oracle E-Business Suite general preferences. Select the field's calendar icon to display a calendar from which you can select a date.
- Priority – Enter `high`, `normal`, or `low` as the notification priority. This search option supports the filter operators `is` or `is not`.
- Response Required – Enter `yes` or `no` to specify whether the notifications require a response from the recipient. This search option supports the filter operators `is` or `is not`.
- FYI – Enter `yes` or `no` to specify whether the notifications are for your information (FYI) only and do not require a response. This search option supports the filter operators `is` or `is not`.
- Notification ID – Enter the numerical notification identifier.

- From Me – Enter `yes` or `no` to specify whether the notifications are sent from you. This search option supports the filter operators `is` or `is not`.

Note: If your installation of Oracle Workflow is set up in a language other than English, the Advanced Search page uses translated versions of the notification status, notification priority, `yes`, and `no` values. In this case you should enter the translated values for the Status, Priority, Response Required, FYI, and From Me search options.

5. Select the Go button to perform your search. You can also select the Clear button to clear the search option fields and remove any additional search options you added, so that you can enter new search criteria.

6. The Advanced Search page displays the notifications that match your search criteria. For each notification, the list displays the following information:

- From – the role from which the notification was sent. This column is displayed when you view notifications sent to you.
 - If this notification was reassigned through the Worklist web pages, the From column shows the user who reassigned the notification to the current recipient.
 - If this notification is a request for more information, the From column shows the user who sent the request.
 - If this notification is a response providing more information, the From column shows the user who sent the response.
 - Additionally, the From role for a notification may be set by special logic in the workflow process. See: `#FROM_ROLE` Attribute, *Oracle Workflow Developer's Guide*.
- Type – display name of the item type to which the workflow process that sent the notification belongs.
- Subject – a description of the notification.
- Sent – date when the notification was delivered.
- Due – date by which the notification should be completed.
- Status – open, closed, or canceled status of the notification.

Select the From, Type, Subject, Sent, Due, or Status column heading to sort the list by that column. By default, the list is sorted by sent date from most recent to oldest and then by subject in alphabetical order.

7. To collectively reassign a group of notifications, select the notifications you want and select the Reassign button. See: To Reassign a Notification to Another User: page 3 – 47.
8. You can navigate to the full details of any notification and act on the notification by clicking on the notification’s Subject link or by selecting the notification and then choosing Open. See: To View the Details of a Notification: page 3 – 42.

If you select more than one notification to open, only one notification is displayed at a time. You can navigate among the open notifications by selecting the Next or Back buttons in the Notification Details page.
9. To define notification routing rules, select the routing rules link that follows the list of notifications. See: To View and Maintain Automatic Notification Processing Rules: page 3 – 51.
10. To save your current search criteria as a personalized view for the worklist, select the Save Search button. See: To Create or Update a Personal Worklist View: page 3 – 69.
11. You can also select the Simple Search button to perform a search with less complex criteria, or select the Worklist button to navigate back to the Worklist. See: To Perform a Simple Search for Notifications: page 3 – 61.

► **To View and Maintain Personal Worklist Views**

1. Navigate to the Personal Worklist Views page.



The Personal Worklist Views page displays all existing views for the role you are logged in as, including both preconfigured views provided by Oracle Workflow and your personalized views. For each view, the list displays the view name, description, last update date, and whether the view is set as your default view.

2. To update a view, select the view and select the Update button. See: To Create or Update a Personal Worklist View: page 3 – 69.

Note: You can only update personal views that you created. You cannot update the preconfigured views provided by Oracle Workflow.

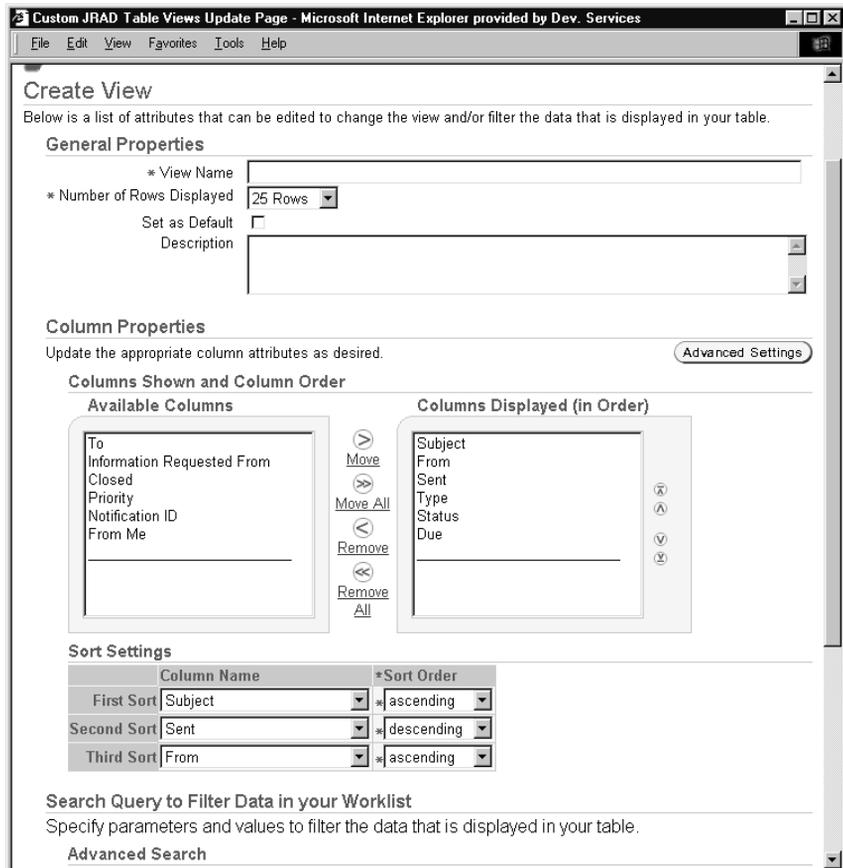
3. To delete a view, select the view and select the Delete button.

Note: You can only delete personal views that you created. You cannot delete the preconfigured views provided by Oracle Workflow.

4. To create a view that is a duplicate of an existing view, select the existing view that you want to copy and select the Duplicate button. See: To Create or Update a Personal Worklist View: page 3 – 69.
5. To create a new view, select the Create View button. See: To Create or Update a Personal Worklist View: page 3 – 69.
6. You can also select the Return to Worklist link to navigate back to the Worklist.

► To Create or Update a Personal Worklist View

1. Navigate to the Create View page, the Duplicate View page, or the Update View page by one of the following methods.
 - In the Personal Worklist Views page, either select the Create View button, select a view and select the Duplicate button, or select a view and select the Update button.
 - After performing a search in the Simple Search page or the Advanced Search page, select the Save Search button.



The Create View page, the Duplicate View page, and the Update View page are identical, except that the fields in the Duplicate View and Update View pages are populated with previously defined information for the selected view. Additionally, if you navigate to the Create View page by saving a simple or advanced search, some fields in the Create View page are populated with your search criteria.

2. In the General Properties region, enter a display name to identify your personalized view.

In the Duplicate View page, the view name defaults to `Duplicate of [original view name]`. You can optionally enter a different name.

3. Select the number of notification rows you want to display in the view.

4. If you want to make this view your default view, check the Set as Default check box. Only one view can be set as the default at any time, so if you check Set as Default for the current view, this option is automatically deselected for any view you previously set as the default.

Note: Although you cannot update any settings for the preconfigured views provided by Oracle Workflow, if you want to use a preconfigured view as your default view, you can create a duplicate of the preconfigured view and check Set as Default for the duplicate view. The preconfigured Open Notifications view is used as the default view if no other default is set.

5. Enter an optional description for the view.
6. In the Column Properties region, specify the notification property columns you want to display in the view and the order in which to display them. The Columns Displayed (in Order) list shows the columns that are currently set to display, while the Available Columns list shows the columns that are not currently set to display but that you can choose to add.
 - To add a column to the view, select the column in the Available Columns list and choose the Move button. You can also choose the Move All button to add all available columns.
 - To remove a column from the view, select the column in the Columns Displayed list and choose the Remove button. You can also choose the Remove All button to remove all the columns.
 - To specify the order in which the columns are displayed, select a column in the Columns Displayed list and use the top, up, down, or bottom arrow buttons to move the column to the position you want in the list.
7. If you want to change the display names for the notification property columns in the view, select the Advanced Settings button. In the Advanced Settings page, enter the new name for each column and select the Apply button to submit your changes. You can also choose the Cancel button to return to the previous page without applying your changes.
8. In the Sort Settings region, you can specify up to three levels of sorting for the notifications in the view. For each level of sorting, select the notification property column by which you want to sort and specify whether to sort in ascending or descending order.

9. In the Search Query to Filter Data in Your Worklist region, specify how you want to apply search criteria to locate specific notifications to display in the view.
 - “Show table data when all conditions are met” – Select this option to locate only notifications that match all your search criteria.
 - “Show table data when any condition is met” – Select this option to locate all notifications that match at least one of your search criteria.
10. Enter the search criteria you want to use to locate notifications to display in the view. The following search options are displayed by default:
 - Subject
 - From
 - Message Attribute
 - Sent

To display additional search options, select the notification property you want from the Add Column pull-down menu and select the Add button.

Note: You can choose to display more than one search option of the same type if you want to apply several search criteria to the same notification property. For example, if you want to search for notifications that were sent between two particular dates, you can display two Sent search options. Set one option to search for all notifications sent after the first date, and set the other option to search for all notifications sent before the second date. If you choose “Show table data when all conditions are met”, then the search will display notifications that match both search criteria, with sent dates falling in between the two dates that you specified.

11. For each search option, select a filter operator and then enter a filter value to specify the notifications you want to display.

For the *is* and *is not* filter operators, you should enter a complete filter value that you want to match or exclude, respectively. For the other filter operators, you can enter a partial value, unless you are using the Sent, Due, and Closed search options, which always require a complete date in the date format you chose in your Oracle E-Business Suite general preferences. The filter value fields for all search options are case insensitive.

If you leave the filter operator and filter value blank for a search option, that option will not be included in the search.

Note: The *greater than*, *less than*, *after*, and *before* filter operators are not inclusive. For example, a search on the *Sent* option with the *after* operator displays only notifications sent after the date you specify, not notifications sent on that date itself.

- **From** – Enter the role from which the notifications were sent.
- **Type** – Enter the display name of the item type to which the workflow process that sent the notification belongs.
- **Subject** – Enter the subject line of the notifications.
- **Sent** – Enter the date when the notifications were delivered, using the date format you chose in your Oracle E-Business Suite general preferences. Select the field's calendar icon to display a calendar from which you can select a date.
- **Due** – Enter the date by which the notifications should be completed, using the date format you chose in your Oracle E-Business Suite general preferences. Select the field's calendar icon to display a calendar from which you can select a date.
- **Status** – Enter *open*, *closed*, or *canceled* as the notification status. This search option supports the filter operators *is*, *is not*, or *contains*.
- **Message Attribute** – Enter the value of a message attribute belonging to the notification. Message attributes hold dynamic content that is determined by the specific context in which a notification is sent. For example, a notification in a requisition workflow might have a message attribute for the requisition amount. Message attribute values can be numbers, dates, or text. This search option supports the filter operators *is* or *contains*.
- **To** – Enter the role to which the notifications were sent.
- **Information Requested From** – Enter the role to which notifications that are requests for more information were sent.
- **Closed** – Enter the date when the notifications were closed or canceled, using the date format you chose in your Oracle E-Business Suite general preferences. Select the field's calendar icon to display a calendar from which you can select a date.
- **Priority** – Enter *high*, *normal*, or *low* as the notification priority. This search option supports the filter operators *is* or *is not*.

- **Response Required** – Enter *yes* or *no* to specify whether the notifications require a response from the recipient. This search option supports the filter operators *is* or *is not*.
- **FYI** – Enter *yes* or *no* to specify whether the notifications are for your information (FYI) only and do not require a response. This search option supports the filter operators *is* or *is not*.
- **Notification ID** – Enter the numerical notification identifier.
- **From Me** – Enter *yes* or *no* to specify whether the notifications are sent from you. This search option supports the filter operators *is* or *is not*.

Note: If your installation of Oracle Workflow is set up in a language other than English, the personal worklist views use translated versions of the notification status, notification priority, *yes*, and *no* values. In this case you should enter the translated values for the Status, Priority, Response Required, FYI, and From Me search options.

12. Select the **Apply** button to save the view.

You can also select the **Cancel** button to return to the **Personal Worklist Views** page without saving the view. Alternatively, you can select the **Revert** button to clear any changes you made to the view settings. In the **Create View** page, the settings revert to the default values, while in the **Update View** or **Duplicate View** page, the settings revert to the previously saved values for the existing view you are updating or duplicating.

CHAPTER

4

Monitoring Workflow Processes

This chapter describes how to monitor the progress of a workflow process.

Accessing the Self–Service Monitor

Note: The Oracle Workflow web pages are being converted to the Oracle Applications Framework user interface format. Depending on your version of Oracle Workflow and which patches you have applied, you may see Oracle Workflow web pages in the new format as well as in the previous format. The Self–Service Monitor pages are currently available for the version of Oracle Workflow embedded in Oracle Applications.

The Self–Service Monitor lets you view and administer workflows that you own. You can use the monitor to review the notifications sent by a workflow, check the progress of the workflow by viewing the status diagram, and examine participant responses to notifications sent by the workflow.

If you have workflow administrator privileges, you can also perform administrative operations within the monitor to control the processing performed for a workflow or handle an error. You can cancel a workflow that you no longer want to run, or you can reassign a notification that you want to send to a different recipient. Workflow administrator privileges are assigned in the Global Workflow Preferences page. See: *To Set Global User Preferences, Oracle Workflow Administrator’s Guide.*

Viewing Workflows in the Status Monitor

When you access the Status Monitor, you can search for the workflows you want to review. You can only search for workflows that you own.

► **To Search for Workflows in the Status Monitor**

1. Use a web browser to navigate to the self–service Status Monitor, using a responsibility and navigation path specified by your system administrator. When you initially navigate to the Status Monitor, the Workflows page is displayed by default. See: Oracle Workflow User Navigation Paths: page A – 2.

You can navigate to the self–service Status Monitor from other Oracle Workflow self–service web pages by choosing the Status Monitor tab or selecting the Status Monitor link at the bottom of the page.

Oracle Workflow Status Monitor - Microsoft Internet Explorer provided by Dev. Services

File Edit View Favorites Tools Help

ORACLE Workflow

Return to Portal Logout Preferences Help

Home Status Monitor Notifications

Workflows

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

* Status

▼ Hide Search Options

* Workflow Started Workflow

Workflow Type

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="checkbox"/> Error Requisition	IK7582	31-Mar-2003 16:51:22	
<input type="radio"/>	<input checked="" type="checkbox"/> Suspended Workflow Agent Ping/Acknowledge	IK1090	31-Mar-2003 16:40:12	
<input type="radio"/>	<input checked="" type="checkbox"/> Active Requisition	IK7578	31-Mar-2003 15:51:28	

Home | Status Monitor | Notifications | Return to Portal | Logout | Preferences | Help

Copyright 2003 Oracle Corporation. All rights reserved. [Privacy Statement](#)

2. To locate specific workflows, enter search criteria in the Search region. The main search option is:
 - Status – Choose the status of the workflows you want to review, or choose Any Status to display workflows in any status.
 - In Process – Workflows that do not have an end date (including errored workflows)
 - Complete – Workflows that have an end date
 - Error – Workflows that do not have an end date and have at least one errored activity
3. You can also enter additional search criteria to search for workflows by other workflow characteristics. To show the additional options if they are hidden, select the Show More Search Options link. To hide these options if they are shown, select the Hide Search Options link. The additional search criteria are:

- Workflow Started – Choose Today, This Week (last seven days), Last 2 Weeks (last fourteen days), Last 30 Days, Last 60 Days, or Any Time to specify the start date of the workflows you want to review. All the start date ranges include the current date; for example, Last 2 Weeks includes today as well as the previous thirteen days.
 - Workflow Type – Select the workflow type you want to review. Select the field’s search icon to display a list of values from which to choose. You can search by the workflow type or description. See: Using a List of Values: page 4 – 4.
 - Workflow – Enter the identifier for the workflow you want to review. You can enter a partial value to search for workflows whose identifiers begin with that value.
4. Select the Go button to perform your search.
 5. The Results region displays the workflows that match your search criteria. For each workflow, the list displays the status, workflow type, workflow identifier, start date, and completion date.
 - Select the Workflow Type, Workflow, or Started column heading to sort the list by that column.
 - To view the error details for an errored workflow, select the error icon or the error link in the Status column.
 6. You can use the monitor buttons to drill down to additional information for a workflow.
 - To review the notifications sent by a workflow, select the workflow and select the Notification History button.
 - To view the status diagram for a workflow, select the workflow and select the Status Diagram button.
 - To view comments and other information gathered for closed response–required notifications in a workflow, select the workflow and select the Participant Responses button.

► **Using a List of Values**

1. For a field that supports a list of values, select the field’s search icon to display a Search and Select page.
2. In the Search region, select the filter to search by, depending on the type of value you are searching for. Then enter a search value in the text field and select the Go button. If you do not specify a search value, Oracle Workflow retrieves the complete list of values.

- The Results region displays the list of values that match your search criteria. Select the value you want and choose the Select button. The value you selected populates the original field. You can also choose the Cancel button in the Search and Select page to return to the previous page without selecting a value.

Viewing Notification History

The Notification History page shows information about the notifications sent by a workflow.

The screenshot shows the Oracle Workflow Status Monitor interface. The main content area displays the following information for workflow IK7578:

- Workflow Type: **Requisition**
- Status: **Active**
- Started: **31-Mar-2003 15:51:28**
- Completed: **Completed**

The **Current Status** region shows a table of notifications:

Select	Status	Notification Subject	Notification Recipient	Notification Sent	Response Received	Response	Activity
<input type="radio"/>	Notified	Requisition 7578, Office chair for 750.00 requires approval	Walker, Mr. Kenneth (Ken)	31-Mar-2003 15:51:29			Notify Requisition Approval Required
<input checked="" type="radio"/>	Complete	Requisition 7578, Office chair has been forwarded to Walker, Mr. Kenneth (Ken) for approval	BLEWIS	31-Mar-2003 15:51:28	None Expected		Notify Requestor of Forward

At the bottom of the page, there are navigation links: [Home](#) | [Status Monitor](#) | [Notifications](#) | [Return to Portal](#) | [Logout](#) | [Preferences](#) | [Help](#). The footer also includes "Copyright 2003 Oracle Corporation. All rights reserved." and a [Privacy Statement](#) link.

The page displays the workflow identifier as well as the following details for the selected workflow:

- Workflow Type – The workflow type.
- Status – The status of the workflow.
- Started – The start date and time for the workflow.
- Completed – The completion date and time for the workflow.

The Current Status region displays the notifications that have been sent by the workflow. For each notification, the list displays the status, subject, recipient, sent date, response received date, response value, and activity name.

- To send e-mail to the recipient of a notification, select the user link in the Notification Recipient column.
- If you have workflow administrator privileges, you can reassign a notification that is not yet complete. Select the notification you want to reassign and select the Reassign button. In the Reassign Notification page, select the new recipient for the notification and select the Apply button. You can also select the Cancel button to return to the previous page without reassigning the notification.

Note: When you reassign a notification from the Status Monitor, Oracle Workflow transfers complete ownership and responsibility for the notification to the new recipient. If you want to delegate authority to respond to the notification but retain ownership of the notification yourself, or if you want to enter comments to the new recipient, you must use the Worklist to reassign the notification. See: *To Reassign a Notification to Another User: page 3 – 47.*

Note: You cannot reassign a notification if the Expand Roles option is selected for the notification.

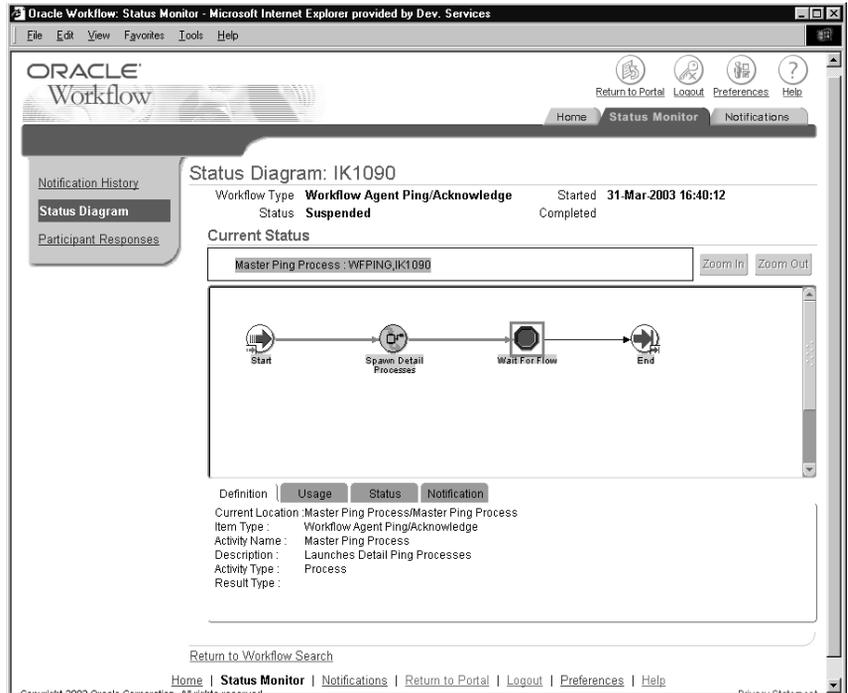
Additionally, you cannot reassign a voting notification that tallies the recipients' responses. See: *Voting Activity, Oracle Workflow Developer's Guide.*

- If you have workflow administrator privileges, you can cancel a workflow that is not yet complete. Select the Cancel Workflow button. In the Cancel page, select Apply. The Workflow Engine sets the status of the workflow to #FORCE, and all processing for the workflow is canceled and cannot be restarted. You can also select the Cancel button to return to the previous page without canceling the workflow.

You can also select the Return link to return to the previous page, or choose Status Diagram or Participant Responses in the side navigation to navigate to the corresponding Status Monitor page.

Viewing a Status Diagram

The Status Diagram page shows the process diagram for a workflow, including graphical cues about the status of the workflow and its activities.



The page displays the workflow identifier as well as the following details for the selected workflow:

- Workflow Type – The workflow type.
- Status – The status of the workflow.
- Started – The start date and time for the workflow.
- Completed – The completion date and time for the workflow.

The Current Status region displays the process title, diagram, and detail tabs for the workflow.

Process Title

The process title appears in the upper left of the Current Status region and displays the workflow process name, type, and identifier. If you drill down into a subprocess in the process diagram, the process title displays the subprocess name.

Process Diagram Window

The process diagram window is a scrolling canvas that displays the diagram of the workflow process or subprocess currently listed in the process title. This diagram is identical to the diagram created in Oracle Workflow Builder. Note, however, that you cannot use the Workflow Monitor to edit this diagram.

The process diagram window provides graphical cues about the status of the process and its activities.

- An activity icon may be highlighted with a colored box to indicate that it is in an "interesting" state. The following table shows what state each color indicates.

Color of Box	State	Possible Status Code
Red	Error	ERROR
Green	Active/In Progress	ACTIVE, NOTIFIED, DEFERRED
Yellow	Suspended	SUSPEND
<none>	Normal	COMPLETE, WAITING, NULL

Table 4 – 1 (Page 1 of 1)

- Any transition (arrow) that has been traversed appears as a thick green line, while an untraversed transition appears as a thin black line.
- Click an activity icon in the diagram to select it and update the detail tab window to display information about the activity.
- Click any empty space in the diagram to deselect the currently selected activity icon and to refresh the detail tab window to display information about the current process as a whole.
- Double-click an activity icon that represents a subprocess to drill down to the diagram for the subprocess. This action automatically updates the process title to reflect the name of the subprocess and updates the detail tab window to display information about the subprocess as a whole.

Alternatively, you can select the subprocess activity and choose Zoom In to drill down to the diagram for the subprocess. Choose Zoom Out to navigate back to the higher level process.

Detail Tab Window

The detail tab window, which appears below the process diagram, is a vertically scrollable display area that provides information about a selected process or activity. The information appears as follows for each tab.

Definition Tab

- Current Location – Process display name/activity display name
- Item Type – Workflow type display name
- Activity Name – Activity display name
- Description – Activity description
- Activity Type – Process, Notice, Event, or Function
- Result Type – Result type display name

Usage Tab

- Current Location – Process display name/activity display name
- Start/End – No, Start, or End
- Performer – Role name or item attribute internal name
- Timeout – Timeout value in minutes or item attribute internal name

Status Tab

- Current Location – Process display name/activity display name
- Status – Activity status
- Result – Activity result
- Begin Date – Date activity begins
- End Date – Date activity ends
- Due Date – Date activity is due to time out
- Assigned User – Role name or item attribute internal name
- Error Message – Error message (shown only if activity status is 'Error')

Notification Tab

- Current Location – Process display name/activity display name
- Recipient – Recipient of notification
- Status – Notification status

- Begin Date – Date notification is delivered
- End Date – Date notification is closed
- Due Date – Date activity is due to time out

Note: If the selected activity is a notification activity where Expand Roles is selected, but no response is required, then the recipient shown is simply the role, rather than the individual users in the role.

You can also select the Return link to return to the previous page, or choose Notification History or Participant Responses in the side navigation to navigate to the corresponding Status Monitor page.

Viewing Participant Responses

The Participant Responses page shows information about closed response-required notifications for a workflow. For example, you can use this page to view individual responses to a voting activity.



The page displays the workflow identifier as well as the following details for the selected workflow:

- Workflow Type – The workflow type.
- Status – The status of the workflow.
- Started – The start date and time for the workflow.
- Completed – The completion date and time for the workflow.

The Notification Responses region lists the closed response–required notifications for the workflow. For each notification, the list displays the notification subject, respondent, comment, and response value.

- To send e–mail to the respondent for a notification, select the user link in the Respondent column.
- To view details about a response, select the details icon in the View Response Details column.

You can also select the Return link to return to the previous page, or choose Notification History or Status Diagram in the side navigation to navigate to the corresponding Status Monitor page.

Note: The Participant Responses page lists only closed response–required notifications. To view information–only (FYI) notifications or unanswered response–required notifications, view the complete notification history for the workflow. See: Viewing Notification History: page 4 – 5.

Viewing Notification Response Details

The Notification Response Details page displays the following details about the selected response:

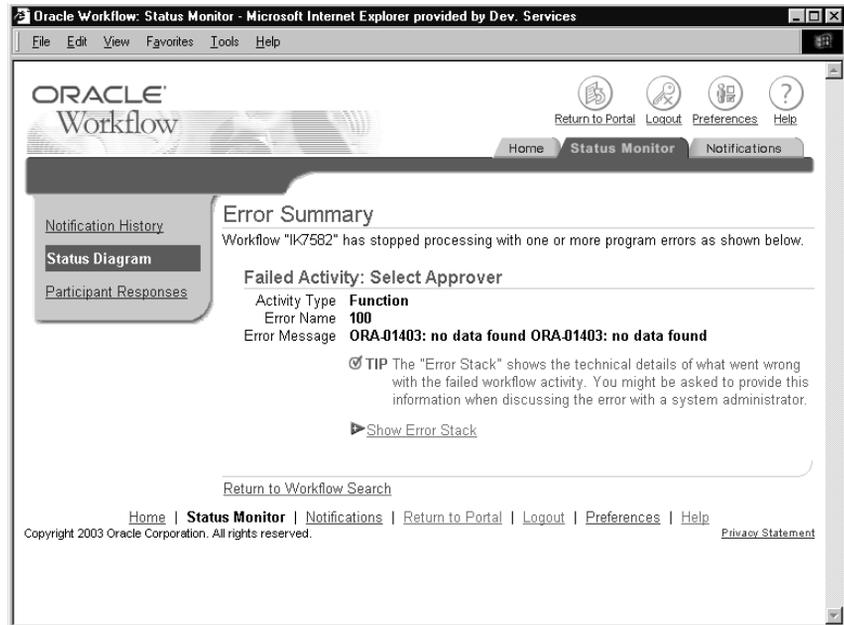
- Notification Subject – The subject line of the notification.
- Respondent – The user who responded to the notification. To send e–mail to the respondent, select the user link.
- Original Recipient – The user to whom the notification was originally sent. If the original recipient is different than the respondent, then the original recipient reassigned responsibility for replying to the respondent. To send e–mail to the original recipient, select the user link.
- Notification Sent – The date and time when the notification was sent.
- Response Received – The date and time when the response was received.
- Response – The response value that is the result of the notification.

The Additional Response Information region lists any further response values requested in the notification in addition to the result response.

Select the Return link to return to the previous page, or choose Notification History or Status Diagram in the side navigation to navigate to the corresponding Status Monitor page.

Viewing Error Information for a Workflow

The Error Summary page shows error information for an errored workflow.



The page displays the workflow identifier as well as the following details for the selected workflow:

- Failed Activity – The name of the activity that encountered an error.
- Activity Type – The activity type, either Function, Notification, Event, or Process.
- Error Name – The internal name of the error.
- Error Message – The error message describing the error.

You can optionally display the error stack, which provides context information to help an administrator locate the source of the error. To show the error stack if it is hidden, select the Show Error Stack link. To hide the error stack if it is shown, select the Hide Error Stack link.

Note: If you navigated to the Error Summary page from an error status link for a workflow, the page shows details for each errored activity within the workflow. If you navigated to the

page from an error status link for a single errored notification activity, the page shows details for only that activity.

You can also select the Return link to return to the previous page.

APPENDIX

A

Oracle Workflow User Navigation Paths

This appendix lists the navigation paths to Oracle Workflow user web pages in the seeded Oracle Workflow responsibilities for Oracle Applications.

Oracle Workflow User Navigation Paths

This table shows the navigation paths to Oracle Workflow user web pages in the seeded Oracle Workflow responsibilities for Oracle Applications. Your system administrator may have customized the responsibilities, menus, and navigation paths in your installation.

Web Page	Standard Navigation Path
Self-Service Home: page 2 – 8	Workflow User Web Applications: Home <i>or</i> Workflow User Web (New): Home
Advanced Worklist: page 3 – 38	Workflow User Web Applications: Advanced Worklist <i>or</i> Workflow User Web Applications: Notifications <i>or</i> Workflow User Web (New): Notifications <i>or</i> Workflow Administrator Web Applications: Notifications <i>or</i> Workflow Administrator Event Manager: Notifications <i>or</i> Workflow Administrator Web (New): Notifications
Worklist: page 3 – 41	Workflow User Web Applications: Worklist
Self-Service Status Monitor: page 4 – 2	Workflow User Web Applications: Status Monitor <i>or</i> Workflow User Web (New): Status Monitor

Table A – 1 (Page 1 of 1)

Note: Note: The Workflow Administrator Web (New) and Workflow User Web (New) responsibilities are provided for reference to highlight the Oracle Applications Framework-based functionality that has been added in Oracle Workflow. The same functionality is also available on the previously existing responsibilities, Workflow Administrator Web Applications, Workflow Administrator Event Manager, and Workflow User Web Applications.

Glossary

Access Level A numeric value ranging from 0 to 1000. Every workflow user operates at a specific access level. The access level defines whether the user can modify certain workflow data. You can only modify data that is protected at a level equal to or higher than your access level.

Activity A unit of work performed during a business process.

Activity Attribute A parameter that has been externalized for a function activity that controls how the function activity operates. You define an activity attribute by displaying the activity's Attributes properties page in the Activities window. You assign a value to an activity attribute by displaying the activity node's Attribute Values properties page in the Process window.

Agent A named point of communication within a system.

Agent Listener A type of service component that processes event messages on inbound agents.

Attribute See Activity Attribute, Item Type Attribute, or Message Attribute.

Background Engines A supplemental Workflow Engine that processes deferred or timed out activities.

Business Event See Event.

Cost A relative value that you can assign to a function or notification activity to inform the Workflow Engine how much processing is required to complete the activity. Assign a higher cost to longer running, complex activities. The Workflow Engine can be set to operate with a threshold cost. Any activity with a cost above the Workflow Engine threshold cost gets set to 'DEFERRED' and is not processed. A background engine can be set up to poll for and process deferred activities.

Directory Services A mapping of Oracle Workflow users and roles to a site's directory repository.

Event An occurrence in an internet or intranet application or program that might be significant to other objects in a system or to external agents.

Event Activity A business event modelled as an activity so that it can be included in a workflow process.

Event Data A set of additional details describing an event. The event data can be structured as an XML document. Together, the event name, event key, and event data fully communicate what occurred in the event.

Event Key A string that uniquely identifies an instance of an event. Together, the event name, event key, and event data fully communicate what occurred in the event.

Event Message A standard Workflow structure for communicating business events, defined by the datatype WF_EVENT_T. The event message contains the event data as well as several header properties, including the event name, event key, addressing attributes, and error information.

Event Subscription A registration indicating that a particular event is significant to a system and specifying the processing to perform when the triggering event occurs. Subscription processing can include calling custom code, sending the event message to a workflow process, or sending the event message to an agent.

External Functions Programs that are executed outside of the Oracle database server.

External Java Functions Java programs that are executed outside of the Oracle Database by the Java Function Activity Agent.

Function A PL/SQL stored procedure that can define business rules, perform automated tasks within an application, or retrieve application information. The stored procedure accepts standard arguments and returns a completion result.

Function Activity An automated unit of work that is defined by a PL/SQL stored procedure.

Generic Service Component Framework A facility that helps to simplify and automate the management of background Java services.

Item A specific process, document, or transaction that is managed by a workflow process. For example, the item managed by the Requisition Approval Process workflow is a specific requisition created by Oracle Internet Commerce's Web Requisitions page.

Item Attribute See Item Type Attribute.

Item Type A grouping of all items of a particular category that share the same set of item attributes. For example, PO Requisition is an item type used to group all requisitions created by Oracle Internet Commerce's Web Requisitions page. Item type is also used as a high level grouping for processes.

Item Type Attribute A feature associated with a particular item type, also known as an item attribute. An item type attribute is defined as a variable whose value can be looked up and set by the application that maintains the item. An item type attribute and its value is available to all activities in a process.

Lookup Code An internal name of a value defined in a lookup type.

Lookup Type A predefined list of values. Each value in a lookup type has an internal and a display name.

Message The information that is sent by a notification activity. A message must be defined before it can be associated with a notification activity. A message contains a subject, a priority, a body, and possibly one or more message attributes.

Message Attribute A variable that you define for a particular message to either provide information or prompt for a response when the message is sent in a notification. You can use a predefined item type attribute as a message attribute. Defined as a 'Send' source, a message attribute gets replaced with a runtime value when the message is sent. Defined as a 'Respond' source, a message attribute prompts a user for a response when the message is sent.

Node An instance of an activity in a process diagram as shown in the Process window.

Notification An instance of a message delivered to a user.

Notification Activity A unit of work that requires human intervention. A notification activity sends a message to a user containing the information necessary to complete the work.

Notification Mailer A type of service component that sends e-mail notifications to users through a mail application, and processes e-mail responses.

Notification Web Page A Web page that you can view from any Web browser to query and respond to workflow notifications.

Performer A user or role assigned to perform a human activity (notification). Notification activities that are included in a process must be assigned to a performer.

Process A set of activities that need to be performed to accomplish a business goal.

Process Definition A workflow process as defined in Oracle Workflow Builder.

Process Activity A process modelled as an activity so that it can be referenced by other processes.

Protection Level A numeric value ranging from 0 to 1000 that represents who the data is protected from for modification. When workflow data is defined, it can either be set to customizable (1000), meaning anyone can modify it or it can be assigned a protection level that is equal to the access level of the user defining the data. In the latter case, only users operating at an access level equal to or lower than the data's protection level can modify the data.

Result Code The internal name of a result value, as defined by the result type.

Result Type The name of the lookup type that contains an activity's possible result values.

Result Value The value returned by a completed activity.

Role One or more users grouped by a common responsibility or position.

Service Component Container An instance of a service or servlet that manages the running of the individual service components that belong to it. The container monitors the status of its components and handles control events for itself and for its components.

Service Component An instance of a Java program which has been defined according to the Generic Service Component Framework standards so that it can be managed through this framework.

Subscription See Event Subscription.

System A logically isolated software environment such as a host machine or database instance.

Timeout The amount of time during which a notification activity must be performed before the Workflow Engine transitions to an error process or an alternate activity if one is defined.

Transition The relationship that defines the completion of one activity and the activation of another activity within a process. In a process diagram, the arrow drawn between two activities represents a transition.

Workflow Definitions Loader A concurrent program that lets you upload and download workflow definitions between a flat file and a database.

Workflow Engine The Oracle Workflow component that implements a workflow process definition. The Workflow Engine manages the state of all activities for an item, automatically executes functions and sends notifications, maintains a history of completed activities, and detects error conditions and starts error processes. The Workflow Engine is implemented in server PL/SQL and activated when a call to an engine API is made.

Index

A

Advanced search, for notifications, 3–64
Advanced Worklist, 3–38
Attachments, Oracle Applications attachments,
3–43
Automatic Notification Handler, 3–30
Automatic notification routing rules, 3–51,
3–52
Automatic responses, 3–30
Automatic routing, 3–30

B

Business Event System, 1–4

D

Delegating notifications, 3–47
Detail Notification web page, 3–24
Direct Response e-mail, 3–3

E

E-mail notifications, 1–5
 example direct response instructions, 3–9
 summaries, 3–29
 templates for, 3–3
 with HTML attachments, 3–2
Electronic signatures, 3–46

F

Find Notifications web page, 3–20
FND_FNDWFNOT, 3–19

H

Header attributes, 3–43
Home page, 2–2
 self-service, 2–8

L

List of values, in a web interface, 3–29

M

Monitor, Self-Service, 4–2
Monitoring, work items, 1–5
More Information, for notifications, 3–50

N

Navigation paths, A – 2
Notification access keys, 3–4
Notification Details page, 3–42
Notification IDs, 3–4
Notification method, 3–2
Notification preference, 2–6
Notification summaries, via e-mail, 3–29
Notification Web page, 1–5
 reassigning notifications, 3–27

Notifications, 3–2
 advanced search, 3–64
 delegating, 3–47
 dependence on directory services, 3–2
 HTML-formatted e-mail, 3–11
 personalized views, 3–58
 plain text e-mail using direct response, 3–8
 plain text e-mail using templated response,
 3–5
 plain text e-mail with attachments, 3–15
 reassign in Notification Web page, 3–27
 reassign via e-mail, 3–17
 reassigning, 3–47
 requesting more information, 3–50
 responding from the Notification Details
 page, 3–42
 responding with Notification Web page, 3–27
 routing rules, 3–51, 3–52
 searching, 3–58
 simple search, 3–61
 via e-mail, 3–2
 via Notification Web page, 3–17
 viewing from a web browser for Oracle
 Applications, 3–38
 viewing from web browser, 3–17

Notifications Worklist. *See* Worklist web page

O

Oracle Applications Manager, 1–5
Oracle Workflow Builder, 1–3
Oracle Workflow home page, 2–2
 self-service, 2–8
Oracle Workflow Manager, 1–5

P

Password-based signatures, 3–46
Personal Worklist, 3–58
Personal worklist views
 creating, 3–69
 maintaining, 3–68
PL/SQL, 1–4
Preferred notification method, 3–2

R

Reassign notifications
 in Notification Web page, 3–27
 in Self-Service Monitor, 4–6
 via e-mail, 3–17
Reassign web page, 3–27
Reassigning notifications, 3–47
Requesting more information for notifications,
 3–50
Respond to notification
 HTML-formatted e-mail, 3–11
 plain text e-mail using direct response, 3–8
 plain text e-mail using templated response,
 3–5
 plain text e-mail with attachments, 3–15
 via Notification Web page, 3–17
Routing, automatic, 3–30
Routing rules, 3–52
 deleting, 3–37, 3–52
 for a role, 3–32
 listing, 3–31, 3–51
 overriding, 3–36, 3–56
 updating, 3–37, 3–52

S

Search, for notifications, 3–61, 3–64
Self-service home page, 2–8
Self-Service Monitor
 error summary, 4–12
 notification history, 4–5
 overview, 4–2
 participant responses, 4–10
 searching for workflows, 4–2
 status diagram, 4–6
Simple search, for notifications, 3–61
Status Monitor, Self-Service, 4–2

T

Templated Response e-mail, 3–3

U

URLs
 for Find Notifications Routing Rules web
 page, 3–32

- for Find Notifications web page, 3–18
- for Notifications Routing Rules web page, 3–31
- for Oracle Workflow home page, 2–2
- for Worklist web page, 3–18

User Preferences, web page, 2–4

User preferences

- document management home, 2–6
- language and territory, 2–6
- notification preference, 2–6

V

Vacation forwarding, 3–30

View notifications

- e-mail summary, 3–29

- electronic mail, 3–2

- Notification Web page, 3–17

W

Web home page, 2–2

- self-service, 2–8

Workflow definitions, loading, 1–4

Workflow Definitions Loader, 1–4

Workflow Designer. *See* Oracle Workflow Builder

Workflow Engine, 1–3

Workflow Monitor, Self-Service, 4–2

Worklist, for Oracle Applications, 3–41

Worklist web page, 3–22

Reader's Comment Form

Oracle Workflow User's Guide, Release 2.6.3 B10285-02

Oracle welcomes your comments and suggestions on the quality and usefulness of this publication. Your input is an important part of the information we use for revision.

- Did you find any errors?
- Is the information clearly presented?
- Do you need more information? If so, where?
- Are the examples correct? Do you need more examples?
- What features did you like most about this manual? What did you like least about it?

If you find any errors or have any other suggestions for improvement, please indicate the topic, chapter, and page number below:

Please send your comments to:

Oracle Applications Documentation Manager
Oracle Corporation
500 Oracle Parkway
Redwood Shores, CA 94065 USA
Phone: (650) 506-7000 Fax: (650) 506-7200

If you would like a reply, please give your name, address, and telephone number below:

Thank you for helping us improve our documentation.

