

**Oracle® Workflow**

Administrator's Guide

Release 2.6.4

**Part No. B15852-03**

July 2005

Contributing Author: Varsha Bhatia, George Buzsaki, John Cordes, Mark Craig, Avinash Dabholkar, Mark Fisher, Yongran Huang, Kevin Hudson, George Kellner, Sai Kilaru, Angela Kung, David Lam, Janet Lee, Jin Liu, Kenneth Ma, Steve Mayze, Santhana Natarajan, Rajesh Raheja, Varadarajan Rajaram, Tim Roveda, Robin Seiden, Vijay Shanmugam, Sachin Sharma, Sheryl Sheh, Allison Sparshott, Susan Stratton, Roshin Thomas, Robert Wunderlich

The Programs (which include both the software and documentation) contain proprietary information; 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. This document is not warranted to be 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.

If the Programs are delivered to the United States Government or anyone licensing or using the Programs on behalf of the United States Government, the following notice is applicable:

#### U.S. GOVERNMENT RIGHTS

Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the Programs, including documentation and technical data, shall be subject to the licensing restrictions set forth in the applicable Oracle license agreement, and, to the extent applicable, the additional rights set forth 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 we disclaim liability for any damages caused by such use of the Programs.

The Programs may provide links to Web sites and access to content, products, and services from third parties. Oracle is not responsible for the availability of, or any content provided on, third-party Web sites. You bear all risks associated with the use of such content. If you choose to purchase any products or services from a third party, the relationship is directly between you and the third party. Oracle is not responsible for: (a) the quality of third-party products or services; or (b) fulfilling any of the terms of the agreement with the third party, including delivery of products or services and warranty obligations related to purchased products or services. Oracle is not responsible for any loss or damage of any sort that you may incur from dealing with any third party.

Oracle, JD Edwards, PeopleSoft, and Retek are registered trademarks of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

---

# Contents

## Send Us Your Comments

## Preface

## 1 Overview of Oracle Workflow

Overview of Oracle Workflow for Administrators . . . . .	1-1
Major Features and Definitions. . . . .	1-2
Workflow Processes . . . . .	1-4

## 2 Setting Up Oracle Workflow

Overview of Setting Up . . . . .	2-1
Oracle Workflow Hardware and Software Requirements . . . . .	2-2
Overview of Required Setup Steps for the Standalone Version of Oracle Workflow . . . . .	2-4
Overview of Required Setup Steps for the Version of Oracle Workflow Embedded in Oracle Applications . . . . .	2-4
Optional Setup Steps. . . . .	2-5
Other Workflow Features . . . . .	2-6
Identifying the Version of Your Oracle Workflow Server . . . . .	2-6
Oracle Workflow Setup Checklist . . . . .	2-6
Step 1: Partitioning Workflow Tables . . . . .	2-9
Step 2: Setting Global User Preferences . . . . .	2-11
Step 3: Setting Up an Oracle Workflow Directory Service . . . . .	2-19
Step 4: Synchronizing Workflow Directory Services with Oracle Internet Directory. . . . .	2-40
Step 5: Setting Up Additional Languages . . . . .	2-46
Step 6: Setting the WF_RESOURCES Environment Variable . . . . .	2-49
Step 7: Setting Up Background Workflow Engines . . . . .	2-50
Step 8: Implementing Notification Mailers . . . . .	2-54
Step 9: Modifying Your Message Templates . . . . .	2-80
Step 10: Adding Worklist Functions to User Responsibilities. . . . .	2-132
Step 11: Setting the WF: Notification Reassign Mode Profile Option . . . . .	2-133
Step 12: Setting Up Vacation Rule Options . . . . .	2-134
Step 13: Setting Up for Electronic Signatures . . . . .	2-135
Step 14: Customizing the Logo on Oracle Workflow's Web Pages . . . . .	2-139
Step 15: Adding Custom Icons to Oracle Workflow . . . . .	2-140
Step 16: Setting Up the Java Function Activity Agent . . . . .	2-140

Step 17: Setting Up the Business Event System . . . . .	2-145
---	-------

### 3 Oracle Workflow Security

Oracle Workflow Security . . . . .	3-1
About Oracle Workflow Security . . . . .	3-1
Configuring Oracle Application Server Security Framework for Oracle Workflow. . . . .	3-4
Configuring Oracle Workflow Security . . . . .	3-5

### 4 Oracle Workflow Home Page

Accessing the Standalone Oracle Workflow Home Page . . . . .	4-1
Accessing the Oracle Workflow Administrator Home Page for Oracle Applications . . . . .	4-3
Defining Vacation Rules for Users in Oracle Applications . . . . .	4-5
Searching for Users' Notifications in Oracle Applications . . . . .	4-6

### 5 Monitoring Workflow Processes

Overview of Workflow Monitoring for Standalone Oracle Workflow . . . . .	5-1
Workflow Monitor. . . . .	5-2
Workflow Monitor Access . . . . .	5-6
Accessing the Administrator Monitor for Oracle Applications . . . . .	5-10
Viewing Workflows in the Status Monitor . . . . .	5-11
Viewing Child Workflows . . . . .	5-13
Viewing Activity History. . . . .	5-14
Viewing a Status Diagram . . . . .	5-16
Viewing Participant Responses . . . . .	5-18
Viewing Workflow Details . . . . .	5-19
Viewing Error Information for a Workflow . . . . .	5-20
Providing Access to the Status Monitor from Applications . . . . .	5-21
Standard Access . . . . .	5-23
Standard Access in Java . . . . .	5-24
Standard Access from Oracle E-Business Suite Forms . . . . .	5-25
Guest Access . . . . .	5-26
Guest Access in Java . . . . .	5-27
Guest Access in PL/SQL . . . . .	5-29
Guest Access from Notifications . . . . .	5-30
Guest Access from Oracle E-Business Suite Forms. . . . .	5-30
Testing Status Monitor Access . . . . .	5-33
Testing Standard Access . . . . .	5-34
Testing Guest Access . . . . .	5-36
Status Monitor Portlets . . . . .	5-37
Error Workflows Portlet. . . . .	5-38
Workflows Portlet . . . . .	5-38

### 6 Oracle Workflow Loaders

Overview of Oracle Workflow Access Protection . . . . .	6-1
---	-----

Setting Up a Default Access Level . . . . .	6-5
<b>Access Protection for Business Event System Data . . . . .</b>	<b>6-6</b>
<b>Using the Workflow Definitions Loader . . . . .</b>	<b>6-7</b>
<b>Using the Workflow XML Loader . . . . .</b>	<b>6-11</b>

## 7 Workflow Administration Scripts

<b>Workflow Administration SQL Scripts. . . . .</b>	<b>7-1</b>
FNDWFPR . . . . .	7-3
WFNLADD.sql . . . . .	7-4
Wfagtlst.sql . . . . .	7-4
Wfbkg.sql . . . . .	7-4
Wfbkgchk.sql . . . . .	7-5
Wfchact.sql . . . . .	7-5
Wfchacta.sql . . . . .	7-5
Wfchita.sql . . . . .	7-6
Wfchitt.sql . . . . .	7-6
Wfchluc.sql . . . . .	7-6
Wfchlut.sql . . . . .	7-6
Wfchmsg.sql . . . . .	7-6
Wfchmsga.sql . . . . .	7-7
Wfdirchk.sql . . . . .	7-7
Wfevtanq.sql . . . . .	7-7
Wfjvstop.sql . . . . .	7-8
Wfmlrdbg.sql . . . . .	7-8
Wfnlena.sql . . . . .	7-9
Wfntfsh.sql . . . . .	7-9
Wfprot.sql . . . . .	7-9
Wfqclean.sql . . . . .	7-9
Wfrefchk.sql . . . . .	7-10
Wfretry.sql . . . . .	7-10
Wfrmall.sql . . . . .	7-10
Wfrmita.sql . . . . .	7-10
Wfrmitms.sql . . . . .	7-11
Wfrmitt.sql . . . . .	7-11
Wfrmtime.sql . . . . .	7-11
Wfrun.sql . . . . .	7-11
Wfstat.sql . . . . .	7-11
Wfstatus.sql . . . . .	7-11
Wfstdchk.sql . . . . .	7-12
Wfver.sql . . . . .	7-12
Wfverchk.sql . . . . .	7-12
Wfverupd.sql . . . . .	7-12

## A Oracle Workflow Administrator Navigation Paths

<b>Oracle Workflow Administrator Navigation Paths. . . . .</b>	<b>A-1</b>
--	------------

**B Oracle Workflow Performance Concepts**

Oracle Workflow Performance Concepts . . . . .	B-1
Designing Workflow Processes for Performance . . . . .	B-1
Managing Runtime Data for Performance . . . . .	B-5

**C Oracle Workflow Profile Options**

Oracle Workflow Profile Options . . . . .	C-1
---	-----

**D Oracle Workflow Diagnostic Tests**

Oracle Workflow Diagnostic Tests . . . . .	D-1
Workflow Tests . . . . .	D-1
Mailer Tests . . . . .	D-7

**E Frequently Asked Questions for Standalone Oracle Workflow**

Frequently Asked Questions for Standalone Oracle Workflow . . . . .	E-1
---	-----

**Glossary**

**Index**

---

# Send Us Your Comments

## **Oracle Workflow Administrator's Guide, Release 2.6.4**

**Part No. B15852-03**

Oracle welcomes your comments and suggestions on the quality and usefulness of this publication. Your input is an important part of the information used 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?

If you find any errors or have any other suggestions for improvement, please indicate the title and part number of the documentation and the chapter, section, and page number (if available). You can send comments to us in the following ways:

- Electronic mail: [appsdoc\\_us@oracle.com](mailto:appsdoc_us@oracle.com)
- FAX: 650-506-7200 Attn: Oracle Applications Technology Group Documentation Manager
- Postal service:  
Oracle Applications Technology Group Documentation Manager  
Oracle Corporation  
500 Oracle Parkway  
Redwood Shores, CA 94065  
USA

If you would like a reply, please give your name, address, telephone number, and electronic mail address (optional).

If you have problems with the software, please contact your local Oracle Support Services.





---

# Preface

## Intended Audience

Welcome to Release 2.6.4 of the *Oracle Workflow Administrator'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 training classes available through Oracle University.

- The Oracle Applications graphical user interface.

To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

- Operating system concepts.
- Oracle Database, Oracle Application Server, and PL/SQL technology.

If you have never used these products, Oracle suggests you attend training classes available through Oracle University.

See Related Documents on page xi for more Oracle Applications product information.

## TTY Access to Oracle Support Services

Oracle provides dedicated Text Telephone (TTY) access to Oracle Support Services within the United States of America 24 hours a day, seven days a week. For TTY support, call 800.446.2398.

## 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. Accessibility 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 more information, visit the Oracle Accessibility Program Web site at <http://www.oracle.com/accessibility/>.

## Accessibility of Code Examples in Documentation

Screen readers 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, some screen readers 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.

## Structure

### **1 Overview of Oracle Workflow**

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

### **2 Setting Up Oracle Workflow**

This chapter describes the requirements for Oracle Workflow and the steps necessary to set up Oracle Workflow at your site.

### **3 Oracle Workflow Security**

This chapter describes the architecture and configuration of security for Oracle Workflow.

### **4 Oracle Workflow Home Page**

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

### **5 Monitoring Workflow Processes**

This chapter discusses how to monitor an instance of a workflow process.

### **6 Oracle Workflow Loaders**

This chapter describes access protection for workflow object definitions and how to load those definitions between a database and a flat file.

### **7 Workflow Administration Scripts**

This chapter describes the SQL scripts that workflow administrators can run against an Oracle Workflow server installation.

### **A Oracle Workflow Administrator Navigation Paths**

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

### **B Oracle Workflow Performance Concepts**

This appendix describes concepts and techniques that you can use to enhance performance when running Oracle Workflow.

### **C Oracle Workflow Profile Options**

This appendix lists the profile options that you can set to configure the version of Oracle Workflow embedded in Oracle Applications.

### **D Oracle Workflow Diagnostic Tests**

This appendix describes the diagnostic tests that workflow administrators can run to check the setup of Oracle Workflow in an Oracle Applications installation.

### **E Frequently Asked Questions for Standalone Oracle Workflow**

This appendix provides answers to frequently asked questions about installing and configuring the standalone version of Oracle Workflow.

## Glossary

## Related Documents

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).

- **PDF Documentation** - See the Oracle Applications Documentation Library CD for current PDF documentation for your product with each release. The Oracle Applications Documentation Library is also available on *OracleMetaLink* and is updated frequently.
- **Online Help** - Online help patches (HTML) are available on *OracleMetaLink*.
- **About Documents** - Refer to the About document for the mini-pack or family pack that you have installed to learn about feature updates, installation information, and new documentation or documentation patches that you can download. About documents are available on *OracleMetaLink*.

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 Guides

You may want to refer to other Oracle Workflow guides and Oracle Applications implementation documentation when you set up and use Oracle Workflow. Additionally, Oracle Workflow is used by other Oracle Applications products to provide embedded workflows and business events. Therefore, if you are using the version of Oracle Workflow embedded in Oracle Applications, you may want to refer to other products' guides to learn more about the workflows and business events they include.

You can read the guides online by choosing Library from the expandable menu on your Oracle Applications HTML help window, by reading from the Oracle Applications Documentation 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.

## **Oracle Workflow Documentation Set**

### ***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 User's Guide***

This guide describes how users can view and respond to workflow notifications and monitor the progress of their workflow processes.

### ***Oracle Workflow API Reference***

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

## **Guides Related to This Product**

### ***Oracle Assets User Guide***

In Oracle Assets, you can post capital project costs to become depreciable fixed assets. Refer to this guide to learn how to query mass additions imported from other products to Oracle Assets and to review asset information.

### ***Oracle General Ledger User Guide***

Use this manual when you plan and define your chart of accounts, accounting period types and accounting calendar, functional currency, and set of books. The manual also describes how to define journal entry sources and categories so you can create journal entries for your general ledger. If you use multiple currencies, use this manual when you define additional rate types, and enter daily rates. This manual also includes complete information on implementing Budgetary Control.

### ***Oracle HRMS Documentation Set***

This set of guides explains how to define your employees, so you can give them operating unit and job assignments. It also explains how to set up an organization (operating unit). Even if you do not install Oracle HRMS, you can set up employees and organizations using Oracle HRMS windows. Specifically, the following manuals will help you set up employees and operating units:

- ***Using Oracle HRMS - The Fundamentals***

This user guide explains how to set up and use enterprise modeling, organization management, and cost analysis.

- ***Managing People Using Oracle HRMS***

Use this guide to learn about entering employees.

### ***Oracle Payables User Guide***

Refer to this manual to learn how to use Invoice Import to create invoices in Oracle Payables from expense reports data in the Oracle Payables interface tables. This manual also explains how to define suppliers, and how to specify supplier and employee numbering schemes for invoices.

#### ***Oracle Projects Implementation Guide***

Use this manual as a guide for implementing Oracle Projects. This manual also includes appendixes covering function security, menus and responsibilities, and profile options.

#### ***Oracle Purchasing User Guide***

Use this guide to learn about entering and managing the requisitions and purchase orders that relate to your projects. This manual also explains how to create purchase orders from project-related requisitions in the AutoCreate Documents window.

#### ***Oracle Receivables User Guide***

Use this manual to learn more about Oracle Receivables invoice processing and invoice formatting, defining customers, importing transactions using AutoInvoice, and defining automatic accounting in Oracle Receivables.

#### ***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.

#### ***Using Oracle Time Management***

This guide provides information about capturing work patterns such as shift hours so that this information can be used by other applications such as Oracle General Ledger.

## **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 installing Oracle Applications.

#### ***Installing Oracle Applications***

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11i, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications and the Oracle 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 11i. 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 11i. You cannot upgrade to Release 11i directly from releases prior to 10.7.

### ***Maintaining Oracle Applications***

Use this guide to help you run the various AD utilities, such as AutoUpgrade, Auto Patch, 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.

## **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 11i. 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 Applications. This manual details additional steps and setup considerations for implementing Oracle Applications with this feature.

### ***Multiple Organizations in Oracle Applications***

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

### ***Oracle Applications Flexfields Guide***

This guide provides flexfields planning, setup, and reference information for the Oracle Applications implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This guide also provides information on creating custom reports on flexfields 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 forms so that they integrate with Oracle Applications.

### ***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 forms-based Oracle Applications products and how to apply this UI to the design of an application built using Oracle Forms.

### ***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 Message Reference Manual***

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

## **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's 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, 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 an Oracle Applications form 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.



---

# Overview of Oracle Workflow

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

This chapter covers the following topics:

- Overview of Oracle Workflow for Administrators

## Overview of Oracle Workflow for Administrators

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 you 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 your 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 1-4.

## **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 you 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 1-4.

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 you include your own PL/SQL procedures or external functions as activities in your 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.

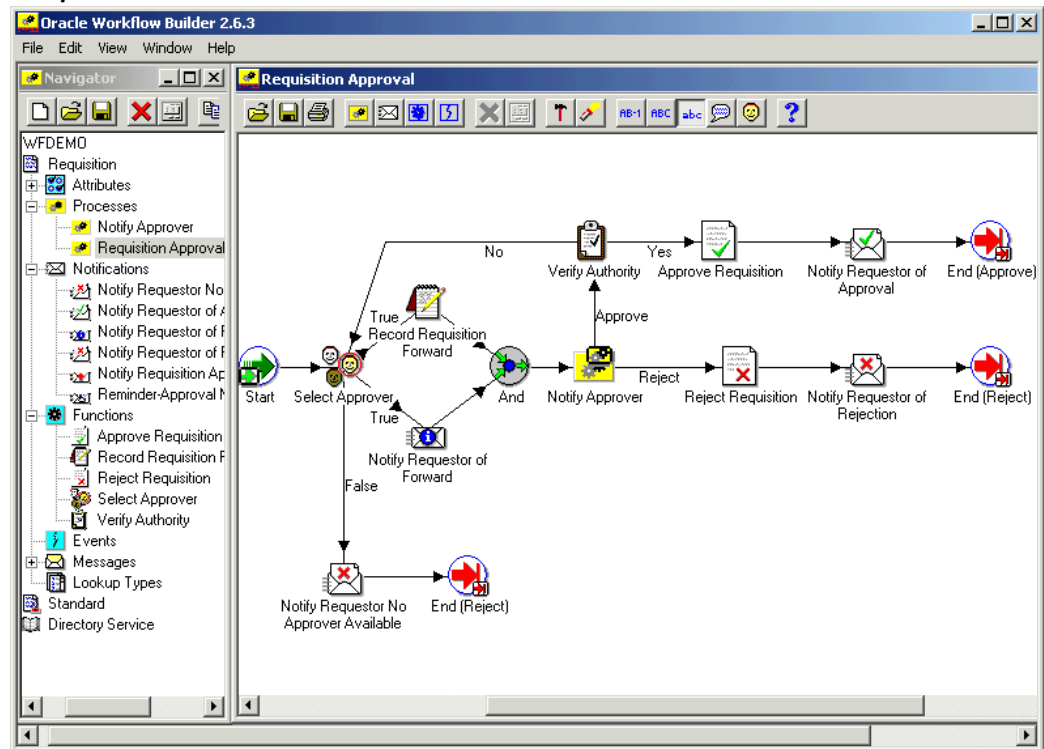
## **Workflow Processes**

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.

### Sample Workflow Process in Oracle Workflow Builder



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.



---

# Setting Up Oracle Workflow

This chapter describes the requirements for Oracle Workflow and the steps necessary to set up Oracle Workflow at your site.

This chapter covers the following topics:

- Overview of Setting Up
- Step 1: Partitioning Workflow Tables
- Step 2: Setting Global User Preferences
- Step 3: Setting Up an Oracle Workflow Directory Service
- Step 4: Synchronizing Workflow Directory Services with Oracle Internet Directory
- Step 5: Setting Up Additional Languages
- Step 6: Setting the WF\_RESOURCES Environment Variable
- Step 7: Setting Up Background Workflow Engines
- Step 8: Implementing Notification Mailers
- Step 9: Modifying Your Message Templates
- Step 10: Adding Worklist Functions to User Responsibilities
- Step 11: Setting the WF: Notification Reassign Mode Profile Option
- Step 12: Setting Up Vacation Rule Options
- Step 13: Setting Up for Electronic Signatures
- Step 14: Customizing the Logo on Oracle Workflow's Web Pages
- Step 15: Adding Custom Icons to Oracle Workflow
- Step 16: Setting Up the Java Function Activity Agent
- Step 17: Setting Up the Business Event System

## Overview of Setting Up

After you install Oracle Workflow, implement it for your site by setting up the preferences and components appropriate for your enterprise.

## Related Topics

Oracle Workflow Hardware and Software Requirements, page 2-2

Overview of Required Setup Steps for the Standalone Version of Oracle Workflow, page 2-4

Overview of Required Setup Steps for the Version of Oracle Workflow Embedded in Oracle Applications, page 2-4

Optional Setup Steps, page 2-5

Other Workflow Features, page 2-6

Identifying the Version of Your Oracle Workflow Server, page 2-6

Oracle Workflow Setup Checklist, page 2-6

## Oracle Workflow Hardware and Software Requirements

The components of Oracle Workflow require the following hardware and software configurations. Some of the requirements are different for standalone Oracle Workflow and Oracle Workflow embedded in Oracle Applications. Check the installation documentation for your installation of Oracle Workflow to determine the exact requirements for your version.

- Oracle Workflow Builder is installed using Oracle Universal Installer. The Oracle Workflow Builder installation includes the Oracle Net Services and Required Support Files which it requires. You should install Oracle Workflow Builder on an IBM, Compaq or 100% compatible personal computer with the following:
  - A Pentium processor or better
  - Clock speed of 66 Mhz or greater (90 Mhz or greater is recommended)
  - Network card
  - SVGA color monitor
  - Microsoft Windows 98, Windows 2000, Windows Server 2003, Windows XP, or Windows NT 4.0 or higher
  - At least 65 Mb of available disk space to install Oracle Workflow Builder, Oracle Net Services, and Required Support Files.
  - At least 32 Mb of memory, 64 Mb recommended

**Note:** Oracle Net Services require and only support the use of Microsoft's TCP/IP drivers.

- The Oracle Workflow Server requires the following:
  - Oracle8i Database Release 3 (8.1.7) or higher, Oracle9i Database, or Oracle Database 10g, Enterprise or Standard Edition

**Note:** To determine which database versions are supported by your version of Oracle Workflow, please refer to the installation documentation for your installation.

- At least 40 Mb of available disk space for Oracle Workflow Server once it is installed in your Oracle Home
- At least 128 Mb of memory, 256 Mb recommended
- Oracle Net Services, corresponding to the version of your Oracle Database



- SQL\*Plus, corresponding to the version of your Oracle Database

**Note:** While the version of Oracle Workflow offered to Oracle8i Database Standard Edition customers is exactly the same as the version offered to Oracle8i Database Enterprise Edition customers, it is important to note that Oracle Workflow leverages Oracle8i Database functionality. Consequently, using an Oracle8i Database Standard Edition database limits some of the features available for use by the Oracle Workflow Business Event System.

For example:

- You cannot create any additional queues in Oracle8i Database Standard Edition beyond the default queues provided by Oracle Workflow. If you require additional queues, you should choose Oracle8i Database Enterprise Edition.
- Oracle Advanced Queuing propagation in Oracle8i Database Standard Edition does not support propagating messages outside the local database. If you require messages to be propagated to other systems, you should choose Oracle8i Database Enterprise Edition.

In Oracle9i Database and higher, however, these restrictions no longer apply. Exactly the same functionality is available with Oracle Workflow in an Oracle9i Database and higher, Standard Edition, as in an Oracle9i Database and higher, Enterprise Edition.

- To send and receive e-mail notifications, you must have an SMTP mail server set up for outbound messages and an IMAP4 compliant mail server set up for inbound messages.
- To send and respond to e-mail notifications with HTML attachments, your e-mail application should support HTML attachments and you should have a Web browser application that supports JavaScript and Frames to view the attachment.
- The Oracle Workflow Web pages require Oracle HTTP Server and mod\_plsql to be installed on a server machine. The Oracle HTTP Server and mod\_plsql components are included with the Oracle Database in Oracle8i Database Release 3 (8.1.7) and higher, as well as with Oracle Application Server.

To view notifications you need a Web browser application that supports JavaScript and Frames. To view the Workflow Monitor you need a Web browser that supports Java Development Kit (JDK) Version 1.1.8 or higher and Abstract Windowing Toolkit (AWT), such as Netscape Communicator version 4.76 or a higher version of 4.7x, or Microsoft Internet Explorer version 5.0x or 5.5x.

- To sign notification responses with certificate-based digital signatures in Oracle Applications, you must use a PC with Microsoft Windows 98, Windows 2000, Windows XP, or Windows NT 4.0 or higher. Additionally, you must access the notifications using Microsoft Internet Explorer version 5.0x, version 5.5x, or higher, or Netscape Communicator version 4.76 or a higher version of 4.7x.

- To run external Java function activities in the standalone version of Oracle Workflow, you must have Java Development Kit (JDK) Version 1.4 installed.
- To use the Workflow XML Loader in the standalone version of Oracle Workflow, you must have Java Development Kit (JDK) Version 1.4 installed. To use the Workflow XML Loader in the version of Oracle Workflow embedded in Oracle Applications, you must have Java Development Kit (JDK) Version 1.3 installed.
- To extract the HTML help for the standalone version of Oracle Workflow, you need an unzip utility.
- To implement Oracle Internet Directory integration, you must have Oracle Internet Directory installed. To implement single sign-on integration, you must install Oracle Workflow shipped with Oracle Application Server, you must implement Oracle Internet Directory integration, and you must have Oracle Application Server Single Sign-On installed and have mod\_osso installed with Oracle HTTP Server.

**Note:** To implement single sign-on integration, you must use a version of the Oracle Database that is certified with your version of Oracle Application Server Single Sign-On.

## Overview of Required Setup Steps for the Standalone Version of Oracle Workflow

1. Set up the default Oracle Workflow user preferences for your entire enterprise using the Global Preferences Web page. The Global Preferences Web page also lets you define your workflow administrator role and your Workflow Web agent. See: Setting Global User Preferences, page 2-11.
2. Ensure that a directory service is set up to provide information about the individuals and roles in your organization who may utilize Oracle Workflow functionality and receive workflow notifications. Oracle Workflow provides two predefined directory services from which you can choose. See: Setting Up an Oracle Workflow Directory Service, page 2-19.
3. Define an environment variable called WF\_RESOURCES if your Workflow server is installed on a UNIX platform. See: Setting the WF\_RESOURCES Environment Variable, page 2-49.
4. Set up background Workflow Engines to control the load and throughput of the primary Workflow Engine on your system. You can specify the cost threshold level of your primary and background engines to determine the activities an engine processes and the activities an engine defers. See: Setting Up Background Workflow Engines, page 2-50.
5. Set up the Business Event System to communicate business events between systems using event subscription processing and Workflow process event activities. See: Setting Up the Business Event System, page 2-145.

## Overview of Required Setup Steps for the Version of Oracle Workflow Embedded in Oracle Applications

1. Set up the default Oracle Workflow user preferences for your entire enterprise using the Workflow Configuration page. The Workflow Configuration page also lets you define your workflow administrator role. See: Setting Global User Preferences, page 2-11.

2. Ensure that a directory service is set up to provide information about the individuals and roles in your organization who may utilize Oracle Workflow functionality and receive workflow notifications. In an Oracle Applications installation, directory service views for users and roles from the unified Oracle Applications environment are automatically implemented for you. See: Setting Up an Oracle Workflow Directory Service, page 2-19.
3. Set up background Workflow Engines to control the load and throughput of the primary Workflow Engine on your system. You can specify the cost threshold level of your primary and background engines to determine the activities an engine processes and the activities an engine defers. See: Setting Up Background Workflow Engines, page 2-50.
4. Set up the Business Event System to communicate business events between systems using event subscription processing and Workflow process event activities. See: Setting Up the Business Event System, page 2-145.

**Important:** Although your Oracle Workflow installation automatically sets up the following for you, you may want to refer to their appropriate sections for additional background information:

- WF\_LANGUAGES view, page 2-46
- Path to the language-dependent resources file, page 2-49

## Optional Setup Steps

1. You can partition the WF\_ITEM\_ACTIVITY\_STATUSES, WF\_ITEM\_ACTIVITY\_STATUSES\_H, WF\_ITEM\_ATTRIBUTE\_VALUES, and WF\_ITEMS tables for performance gain. See: Partitioning Workflow Tables, page 2-9.
2. If you are using the standalone version of Oracle Workflow, you can synchronize the user information in your Workflow directory service with Oracle Internet Directory. Additionally, if you have installed Oracle Workflow shipped with Oracle Application Server, you can also use Oracle Internet Directory integration to implement single sign-on integration. See: Synchronizing Workflow Directory Services with Oracle Internet Directory, page 2-40.
3. Set up additional languages if you want to use Oracle Workflow in languages other than English. See: Setting Up Additional Languages, page 2-46.
4. Set up one or more notification mailers if you want to allow your users to receive notifications by e-mail. See: Implementing Notification Mailers, page 2-54.
5. You can modify the templates for your electronic mail notifications. See: Modifying Your Message Templates, page 2-80.
6. If you are using the version of Oracle Workflow embedded in Oracle Applications, you can give users access to the Advanced Worklist and Personal Worklist Web pages from any responsibility you choose. See: Adding Worklist Functions to User Responsibilities, page 2-132.
7. If you are using the version of Oracle Workflow embedded in Oracle Applications, you can use the WF: Notification Reassign Mode profile option to control which reassign modes are available to users from the Notification Details page. See: Setting the WF: Notification Reassign Mode Profile Option, page 2-133.
8. If you are using the version of Oracle Workflow embedded in Oracle Applications, you can control the item types for which users can define vacation

rules, using the WF: Routing Rule Item Types lookup type and the WF: Vacation Rules - Allow All profile option. See: Setting Up Vacation Rule Options, page 2-134.

9. If you are using the version of Oracle Workflow embedded in Oracle Applications, you can set up users to enable electronic signatures in notification responses. See: Setting Up for Electronic Signatures, page 2-135.
10. Customize the company logo that appears in Oracle Workflow's Web pages. See: Customizing the Logo on Oracle Workflow's Web Pages, page 2-139.
11. You can include additional icons to your Oracle Workflow Icons subdirectory to customize the diagrammatic representation of your workflow processes. Use custom symbols for each activity you define. See: Adding Custom Icons to Oracle Workflow, page 2-140.
12. Set up the Java Function Activity Agent if you are using the standalone version of Oracle Workflow and you want to run external Java function activities. See: Setting Up the Java Function Activity Agent, page 2-140.

## Other Workflow Features

Before deploying Oracle Workflow and custom process definitions to other branches of your enterprise, you can protect your data from further modification by determining the level of access your users have to the data. See: Overview of Oracle Workflow Access Protection, page 6-1.

You can also use the Workflow Definitions Loader to load workflow process definitions from flat files to the database without using Oracle Workflow Builder. See: Using the Workflow Definitions Loader, page 6-7.

If you are using the Business Event System, you can use the Workflow XML Loader to load XML definitions for Business Event System objects between a database and a flat file. See: Using the Workflow XML Loader, page 6-11.

For details about configuring Oracle Workflow security, see: Oracle Workflow Security, page 3-1.

## Identifying the Version of Your Oracle Workflow Server

If you ever need to determine the version of the Oracle Workflow server you are running, you can connect to your Oracle Workflow database account using SQL\*Plus and run a script called `wfver.sql`. See: `wfver.sql`, page 7-12.

In addition, all Oracle Workflow modules, such as the Workflow Definitions Loader, Oracle Workflow Builder, notification mailers, and the Workflow Monitor, automatically verify that the module is compatible with the version of the Oracle Workflow server that it is operating against. This version compatibility check helps to prevent problems such as running Oracle Workflow Builder 2.6.3 against an Oracle Workflow 2.0.3 database.

## Oracle Workflow Setup Checklist

The following table lists Oracle Workflow setup steps. The table shows whether each step is required or optional and whether the step applies to the standalone or embedded version of Oracle Workflow or both. You need to perform optional steps only if you plan to use the related feature or complete certain business functions.

**Note:** For the latest documentation updates, product alerts, technical notes, and troubleshooting tips, please refer to the Oracle Workflow area on *OracleMetaLink*.

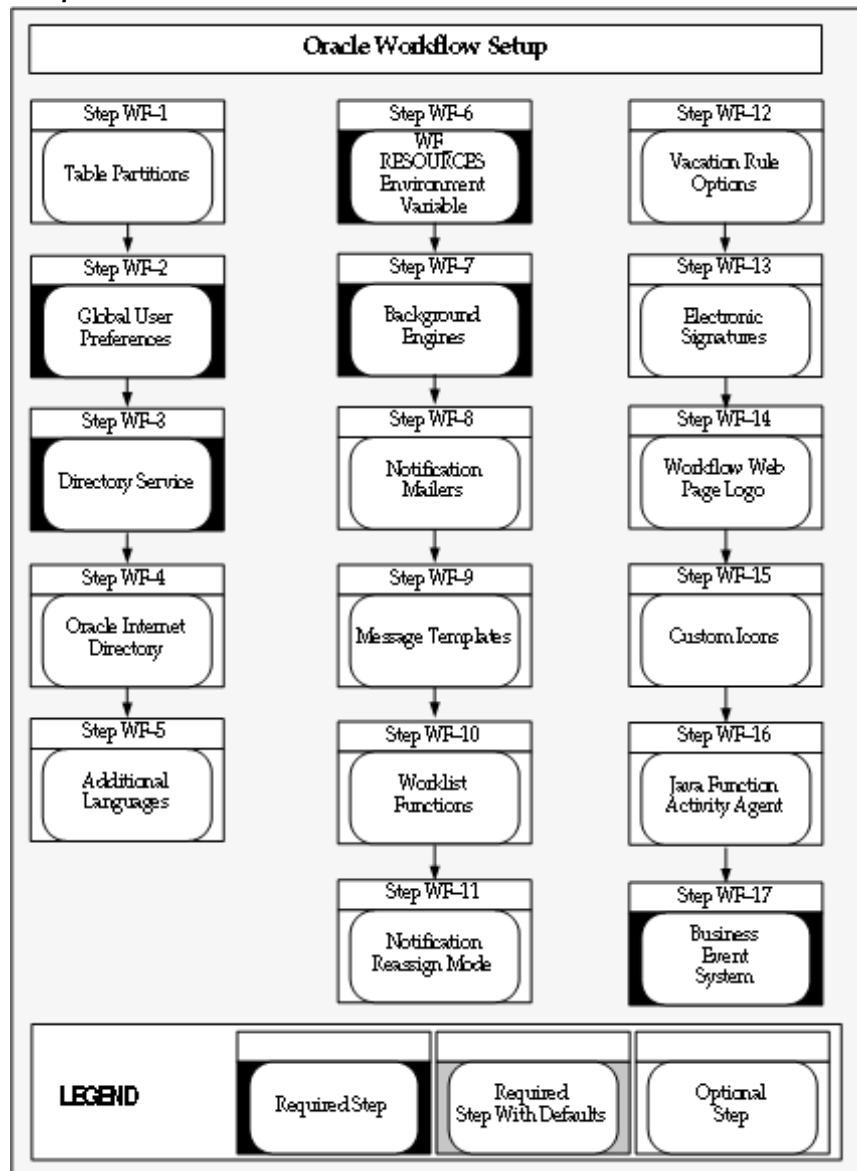
**Setup Checklist**

Step Number	Requirement	Step	Workflow Version
Step 1	Optional	Partitioning Workflow Tables, page 2-9	Both
Step 2	Required	Setting Global User Preferences, page 2-11	Both
Step 3	Required	Setting Up an Oracle Workflow Directory Service, page 2-19	Both
Step 4	Optional	Synchronizing Workflow Directory Services with Oracle Internet Directory, page 2-40	Standalone
Step 5	Optional	Setting Up Additional Languages, page 2-46	Both
Step 6	Required	Setting the WF_RESOURCES Environment Variable, page 2-49	Standalone
Step 7	Required	Setting Up Background Workflow Engines, page 2-50	Both
Step 8	Optional	Implementing Notification Mailers, page 2-54	Both
Step 9	Optional	Modifying Your Message Templates, page 2-80	Both
Step 10	Optional	Adding Worklist Functions to User Responsibilities, page 2-132	Embedded
Step 11	Optional	Setting the WF: Notification Reassign Mode Profile Option, page 2-133	Embedded
Step 12	Optional	Setting Up Vacation Rule Options, page 2-134	Embedded
Step 13	Optional	Setting Up for Electronic Signatures, page 2-135	Embedded

Step Number	Requirement	Step	Workflow Version
Step 14	Optional	Customizing the Logo on Oracle Workflow's Web Pages, page 2-139	Both
Step 15	Optional	Adding Custom Icons to Oracle Workflow, page 2-140	Both
Step 16	Optional	Setting Up the Java Function Activity Agent, page 2-140	Standalone
Step 17	Required	Setting Up the Business Event System, page 2-145	Both

The following flowchart shows the Oracle Workflow setup steps in a graphical format, indicating which steps are required and which are optional.

**Setup Flowchart**



## Step 1: Partitioning Workflow Tables

Partitioning addresses key issues in supporting very large tables and indexes by letting you decompose them into smaller and more manageable pieces called partitions. SQL queries and DML statements do not need to be modified in order to access partitioned tables. However, once partitions are defined, DDL statements can access and manipulate individual partitions rather than entire tables or indexes. In this way, partitioning can simplify the manageability of large database objects. Also, partitioning is entirely transparent to applications.

You can optionally run a script to partition certain Workflow tables that store runtime status data. For the version of Oracle Workflow embedded in Oracle Applications, the script is called `wfupartb.sql`; for the standalone version of Oracle Workflow, the script is called `wfupart.sql`. This step is highly recommended for performance gain.

The script partitions four Workflow tables and recreates the associated indexes. The following table shows the Workflow tables and indexes on which the script runs.

**Partitioned Tables and Associated Indexes**

Table	Indexes
WF_ITEM_ACTIVITY_STATUSES	WF_ITEM_ACTIVITY_STATUSES_PK, WF_ITEM_ACTIVITY_STATUSES_N1, and WF_ITEM_ACTIVITY_STATUSES_N2
WF_ITEM_ACTIVITY_STATUSES_H	WF_ITEM_ACTIVITY_STATUSES_H_N1 and WF_ITEM_ACTIVITY_STATUSES_H_N2
WF_ITEM_ATTRIBUTE_VALUES	WF_ITEM_ATTRIBUTE_VALUES_PK
WF_ITEMS	WF_ITEMS_PK, WF_ITEMS_N1, WF_ITEMS_N2, and WF_ITEMS_N3

Before running the partitioning script, you should back up these four tables so that you can restore them in case the script fails.

To run the script, you must have sufficient free space on the table and index tablespaces. During the creation of the partitioned tables, the script requires slightly more disk space than the underlying tables, in the same tablespace where the underlying tables are located. Similarly, sufficient free space is required for the index tablespace.

Additionally, you should allow sufficient time for the script to run. The amount of time needed depends on the amount of data in the tables. When the tables already contain existing data, such as after an upgrade from a previous release, the script requires more time than it does when the tables are empty, such as after a fresh installation of Oracle Workflow. To minimize the time required, run the script as early as possible in your setup process.

**Important:** If you are running the partitioning script through Oracle Net Services, then you must set the TWO\_TASK variable before you begin.

For Oracle Workflow embedded in Oracle Applications, the wfupartb.sql script is located in the admin/sql subdirectory under \$FND\_TOP. Use the script as follows:

```
sqlplus <apps_user>/<apps_passwd> @wfupartb <fnd_user>
<fnd_passwd> <apps_user> <apps_passwd>
```

For example:

```
sqlplus apps/apps @wfupartb applsys apps apps apps
```

For standalone Oracle Workflow, the wfupart.sql script is located in the wf/admin/sql subdirectory in your Oracle Home. Use the script as follows:

```
sqlplus <wf_user>/<wf_passwd> @wfupart <wf_user> <wf_passwd>
```

For example:

```
sqlplus owf_mgr/owf_mgr @wfupart owf_mgr owf_mgr
```



If the partitioning script fails, you must perform any necessary cleanup manually. Since the script's operations are DDL operations running in `nologging` mode, rollback is not possible.

## Related Topics

Partitioning for Performance, page B-5

## Step 2: Setting Global User Preferences

Users can control how they interact with Oracle Workflow by specifying user preferences. As a workflow administrator, you also have access to globally set default user preference values for the entire enterprise, using the Global Preferences page in standalone Oracle Workflow or the Workflow Configuration page in Oracle Applications. An individual user can override a default user preference at any time by modifying his or her preference setting, using the User Preferences Web page in standalone Oracle Workflow or the Preferences page in Oracle Applications.

See: Setting User Preferences, *Oracle Workflow User's Guide* and Set Preferences, *Oracle Applications User's Guide*.

### To Set Global Preferences for Standalone Oracle Workflow:

1. Use a Web browser to connect to the Oracle Workflow home page, and then choose the Global Preferences link:

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

Alternatively, you can connect directly to the Global Preferences Web page:

```
<webagent>/wf_pref.edit?edit_defaults=Y
```

`<webagent>` represents the base URL of the Web agent you configured for Oracle Workflow in your Web server.

**Important:** 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.

**Note:** You must have workflow administrator privileges to access the Global Preferences page. In standalone Oracle Workflow, workflow administrator privileges are initially assigned to all users by default. You can change that assignment in this page.

2. The Global Preferences Web page displays a summary of your current global preferences, except for the LDAP password which is not displayed for security reasons. Choose Update to modify these preferences.
3. In the Workflow Administrator field, use the list of values to select the role to which you want to assign workflow administrator privileges. Any user associated with this role can run the Oracle Workflow Find Processes Web page, which provides full access to the Workflow Monitor administration features. In addition, any user in the administration role can view any other user's notifications, launch test and demonstration processes, and access the Event Manager Web pages. See: Setting Up an Oracle Workflow Directory Service, page 2-19.

If you want all users and roles to have workflow administrator privileges, such as in a development environment, enter an asterisk (\*) in the Workflow Administrator field.

**Note:** To find out which role currently has workflow administrator privileges, without accessing the Global Preferences page, you can use the following command:

```
select text
from wf_resources
where name = 'WF_ADMIN_ROLE';
```

After installing Oracle Workflow, you should change the Workflow Administrator preference from the default setting to the role that you want to have administrator privileges. For the standalone version of Oracle Workflow, the default setting after installation is an asterisk (\*). You can log in as any user to access the Global Preferences page and specify the preferences you want.

4. In the Workflow Web Agent field, enter the base URL of the Oracle Web agent you defined for Oracle Workflow in Oracle HTTP Server.

**Note:** The list of values fields that are implemented in many of Oracle Workflow's Web pages will not function properly unless you specify the base URL of your Oracle Workflow Web agent in this field.

The base URL should look like this if you are using Oracle HTTP Server as your Web server:

```
http://<server.com:portID>/pls/<DAD_name>
```

<server.com:portID> represents the server and TCP/IP port number on which your Web listener accepts requests, and <DAD\_name> represents the name of the Database Access Descriptor (DAD) configured for the Oracle Workflow database schema.

See your Oracle HTTP Server documentation for more information.

5. The Local System field displays the system name for the database where this installation of Oracle Workflow is located. Oracle Workflow automatically creates the system definition for this database in the Event Manager during installation. The Business Event System treats this system as the local system. See: *Systems, Oracle Workflow Developer's Guide*.

**Note:** The Local System setting is specific to this installation of Oracle Workflow and is not included when Business Event System data is replicated to other systems.

6. In the System Status field, use the list of values to select the Business Event System status that you want to assign to the local system.
  - Enabled - Subscriptions are executed on all events.
  - Local Only - Subscriptions are executed only on events raised on the local system.
  - External Only - Subscriptions are executed only on events received by inbound agents on the local system.

- Disabled - No subscriptions are executed on any events.  
  
**Note:** Oracle Workflow sets the system status to Enabled by default. After you finish setting up the Business Event System, you can change the setting to the status you want for event processing.  
  
**Note:** The System Status setting is specific to this installation of Oracle Workflow and is not included when Business Event System data is replicated to other systems.
7. If you are implementing Oracle Internet Directory synchronization, specify the Lightweight Directory Access Protocol (LDAP) server information for the LDAP directory to which you want to connect.
    - LDAP Host - The host on which the LDAP directory resides.
    - LDAP Port - The port on the host.
  8. If you are implementing Oracle Internet Directory synchronization, specify the LDAP user account used to connect to the LDAP server. This LDAP user account must have write privileges.
    - LDAP User Name - The LDAP user. This user name is required to bind to the LDAP directory. For example:  
`cn=orcladmin`
    - Old LDAP Password - Enter your current LDAP password. Oracle Workflow validates this password before letting you change it.
    - New LDAP Password - Enter the new LDAP password you want to use. The password must be at least five characters long.
    - Repeat LDAP Password - Enter your new LDAP password again in this field to confirm it. You must enter exactly the same value that you entered in the New LDAP Password field.  
  
**Note:** LDAP password values are masked as asterisks in the display and are stored in encrypted form.
  9. If you are implementing Oracle Internet Directory synchronization, specify the directories for the change log and the user records.
    - LDAP Changelog Base Directory - The LDAP node under which change logs are located. For example:  
`cn=changelog`
    - LDAP User Base Directory - The LDAP node under which user records can be found. For example:  
`cn=Base, cn=OracleSchemaVersion`
  10. 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 users' notification sessions.

11. In the Date Format field, specify an Oracle Database-compliant date format that defines the default date format for the workflow database sessions of all users. 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.

12. Leave the Document Home Node field blank. This functionality is reserved for future use.
13. In the 'Send me electronic mail notifications' field, use the list of values to select a notification preference:
  - HTML mail with attachments - Send notifications as HTML e-mail with attached links to the Notification Details page. Users must read their mail using an HTML e-mail viewer.
  - Plain text mail with HTML attachments - Send 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 notifications as plain text e-mail.
  - Plain text summary mail - Send a summary of all notifications as plain text e-mail. Users must use the Worklist Web page to take action on individual notifications.
  - Do not send me mail - Do not send the notifications as e-mail. Users must view the notifications and take action from the Worklist Web page.
  - HTML mail - Send 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. Users must read their mail using an HTML e-mail viewer.

**Note:** Oracle Workflow also uses a notification preference called Disabled, which is set automatically at the user preference level for a user with an invalid e-mail address. Do not set the global notification preference to this value.

The "HTML summary mail" preference is not applicable for standalone Oracle Workflow. This notification preference is currently only available with Oracle Workflow embedded in Oracle Applications.

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

**Note:** These global language, territory, document home node, and notification preferences are saved to the Oracle Workflow Preferences table for a special user name called `-WF_DEFAULT-`. The workflow

administrator role, workflow Web agent, local system, and LDAP information is saved to the Workflow Resources table.

**Important:** The Language, Territory, and Notification preference settings in the Global Preferences and User Preferences Web pages are valid only if your directory service views map the Language, Territory, and Notification\_Preference columns to the Oracle Workflow preferences table. If you map to some other preference source or set a hard-coded value to these columns, any changes you make to the preferences via the preferences Web pages are ignored. See: Setting Up an Oracle Workflow Directory Service, page 2-19.

### To Set Global Preferences for Oracle Workflow Embedded in Oracle Applications:

1. Use a Web browser to navigate to the Workflow Configuration page, using a responsibility and navigation path specified by your system administrator. See: Oracle Workflow Administrator Navigation Paths, page A-1.

**Note:** You must have workflow administrator privileges to set global workflow preferences in the Workflow Configuration page. If you do not have administrator privileges, you can view global workflow preferences, but you cannot modify them. In Oracle Applications, workflow administrator privileges are initially assigned to the SYSADMIN user by default. You can change that assignment in this page.

2. In the Workflow System Administrator field, select the role to which you want to assign workflow administrator privileges. Any user associated with this role can set global workflow preferences in this page, view workflows owned by any user and perform administrative operations in the Status Monitor, run test workflows in the Developer Studio, and maintain Business Event System objects and raise test events in the Event Manager. See: Setting Up an Oracle Workflow Directory Service, page 2-19.

If you want all users and roles to have workflow administrator privileges, such as in a development environment, enter an asterisk (\*) in the Workflow System Administrator field.

**Note:** To find out which role currently has workflow administrator privileges, without accessing the Workflow Configuration page, you can use the following command:

```
select text
from wf_resources
where name = 'WF_ADMIN_ROLE';
```

After installing Oracle Workflow, you should change the Workflow Administrator preference from the default setting to the role that you want to have administrator privileges. For the version of Oracle Workflow embedded in Oracle Applications, the default setting after installation is SYSADMIN. You must log in as the SYSADMIN user to access the Workflow Configuration page and specify the preferences you want.

**Note:** The `SYSADMIN` role is different than the role associated with the System Administrator responsibility in Oracle Applications. If you want to assign workflow administrator privileges to this or any other Oracle Applications responsibility, you must set the Workflow System Administrator preference to the internal name of the workflow role associated with that responsibility.

You can query the `WF_ROLES` view to find the role name for a responsibility. For example, to find the role names for various administrator responsibilities in Oracle Applications, use the following command:

```
select name, display_name
from wf_roles
where display_name like '%Admin%';
```

If you set the Workflow System Administrator preference to the role name of a responsibility, then any Oracle Applications user with that responsibility will have workflow administrator privileges.

3. If you are integrating with Oracle Internet Directory, specify the Lightweight Directory Access Protocol (LDAP) server information for the LDAP directory to which you will connect. If you already configured these parameters while installing Oracle Application Server with Oracle E-Business Suite, Oracle Workflow displays those values here. For more information, see: *Installing Oracle Application Server 10g with Oracle E-Business Suite Release 11i* (Oracle*MetaLink* note 233436.1) and *Integrating Oracle E-Business Suite Release 11i with Oracle Internet Directory and Oracle Single Sign-On* (Oracle*MetaLink* note 261914.1).

- Host - The host on which the LDAP directory resides.
- Port - The port on the host.
- Username - The LDAP user account used to connect to the LDAP server. This user name must have write privileges and is required to bind to the LDAP directory. For example:  
`cn=orcladmin`
- Old Password - Enter your current LDAP password. Oracle Workflow validates this password before letting you change it.
- New Password - Enter the new LDAP password you want to use. The password must be at least five characters long.
- Repeat Password - Enter your new LDAP password again in this field to confirm it. You must enter exactly the same value that you entered in the New LDAP Password field.

**Note:** LDAP password values are masked as asterisks in the display and are stored in encrypted form.

- Change Log Base Directory - The LDAP node under which change logs are located. For example:

```
cn=changelog
```

- User Base Directory - The LDAP node under which user records can be found. For example:  
`cn=Users,dc=oracle,dc=com`
4. Specify details about the local system that identifies this installation of Oracle Workflow in the Business Event System. See: Systems, *Oracle Workflow Developer's Guide*.
- System Name - The system name for the database where this installation of Oracle Workflow is located. Oracle Workflow automatically creates the system definition for this database in the Event Manager during installation.
  - Status - Select the execution status for the local system.
    - Enabled - Subscriptions are executed on all events. Oracle Workflow sets the system status to Enabled by default.
    - Local Only - Subscriptions are executed only on events raised on the local system.
    - External Only - Subscriptions are executed only on events received by inbound agents on the local system.
    - Disabled - No subscriptions are executed on any events.

**Note:** The local system settings are specific to this installation of Oracle Workflow and are not included when Business Event System data is replicated to other systems.
5. Specify default workflow preferences for your users.
- Notification Style - Specify whether Oracle Workflow should send e-mail notifications to users, and if so, in what format. A user can override this default setting by specifying a different notification style in his or her individual Oracle E-Business Suite preferences.
    - HTML mail with attachments - Send notifications as HTML-formatted e-mail with attached links to the Notification Details page. Users must read their e-mail using an HTML e-mail client.
    - Plain text mail with HTML attachments - Send 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 notifications as plain text e-mail.
    - Plain text summary mail - Send a summary of all notifications as plain text e-mail. Users must use the Worklist Web pages to view and take action on individual notifications.
    - Do not send me mail - Do not send the notifications as e-mail. Users must use the Worklist Web pages to view and take action on their notifications.
    - HTML mail - Send notifications as HTML-formatted 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. Users must read their e-mail using an HTML e-mail client.

- HTML summary mail - Send a summary of all notifications as HTML-formatted e-mail, with a link to the Worklist page as well as links to each notification in the Notification Details page. Users must use the Worklist Web pages to view and take action on individual notifications.

**Note:** To send e-mail notifications, you must configure and run a notification mailer. Additionally, users who are to receive e-mail notifications must have an e-mail address defined. You can run a diagnostic test through Oracle Diagnostics to check that all users with a notification preference to receive e-mail have an e-mail address defined. See: *Implementing Notification Mailers*, page 2-54, *Setting Up an Oracle Workflow Directory Service*, page 2-19, and *Oracle Workflow Diagnostic Tests*, page D-1.

Users can always access their notifications through the Worklist Web pages, even if their notification preference also includes e-mail notifications.

**Note:** Oracle Workflow also uses a notification preference called Disabled, which is set automatically at the user preference level for a user with an invalid e-mail address. Do not set the global notification preference to this value.

- Browser Signing DLL Location - The location of the `Capicom.dll` file that is used for Web page operations with encryption in the Microsoft Internet Explorer browser. This preference is required only if you plan to use certificate-based digital signatures to confirm notification responses, and your users access Oracle Applications with Microsoft Internet Explorer.

By default, this preference is set to a URL at which the `Capicom.dll` file can be downloaded from Microsoft's Web site. In most cases, you do not need to change this setting. However, you can update this preference if the location of the `Capicom.dll` file changes, or if you choose to store a copy of the file on your local network and point to that location instead.

For more information about setting up for certificate-based signatures, see: *Loading Certificates for Digital Signatures*, page 2-135.

6. Review details about the JInitiator plugin in your Oracle Applications installation. Oracle Workflow uses JInitiator to launch Oracle Applications forms linked to notifications.

- Class ID - The class identifier for this version of JInitiator.
- Download Location - The location where the JInitiator executable is staged for download to users' client machines.
- Version - The JInitiator version number.

For more information, refer to *OracleMetaLink* note 162488.1, "Complete Guide to JInitiator for Oracle's E-Business Suite: 11.5.x (11i)."

**Note:** The global notification and DLL location preferences are saved to the Oracle Workflow preferences table for a special user name called `-WF_DEFAULT-`. The workflow administrator role, LDAP, local system, and JInitiator information is saved to the Oracle Workflow resources table.



## Step 3: Setting Up an Oracle Workflow Directory Service

Oracle Workflow requires a directory service to provide information about the individuals and roles in your organization who may utilize Oracle Workflow functionality and receive workflow notifications. Oracle Workflow references this user and role information through the following views.

- WF\_USERS - Individual users.
- WF\_ROLES - Roles, which can have one or more users as members.
- WF\_USER\_ROLES - Associations of users with the roles of which they are members.

**Note:** A role can contain only individual users as its members. It cannot contain another role. However, in Oracle Applications only, roles can be related to each other in a hierarchy so that users assigned to one role automatically inherit membership in its superior roles as well.

- WF\_USER\_ROLE\_ASSIGNMENTS\_V - Assignments of users to roles, both direct and inherited through role hierarchy relationships. This view is used only in Oracle Applications.

See: Workflow Directory Service Views, page 2-30.

Oracle Workflow provides predefined directory services for you that are implemented by default during installation.

- If you are using the standalone version of Oracle Workflow, you can choose one of two predefined directory services.
  - During installation, you can choose to integrate with Oracle Internet Directory as your directory repository. In this case, directory service views that support Oracle Internet Directory integration are automatically implemented for you. See: Integrating an Oracle Workflow Directory Service with Oracle Internet Directory, page 2-21 and Synchronizing Workflow Directory Services with Oracle Internet Directory, page 2-40.
  - If you do not choose to integrate with Oracle Internet Directory, directory service views that use Oracle Database users and roles as your directory repository are automatically implemented for you by default. You should modify the default views to add e-mail addresses for these users if you want them to be able to receive e-mail notifications. You should also grant the wf\_plsql\_ui database role to your database users so that they can access the Oracle Workflow Web pages. See: Integrating an Oracle Workflow Directory Service with Oracle Database Users, page 2-22.
- If you are using the version of Oracle Workflow embedded in Oracle Applications, directory service views for users and roles from the unified Oracle Applications environment are automatically implemented for you. See: Setting Up a Directory Service for Oracle Workflow Embedded in Oracle Applications, page 2-23.

You can also create your own directory service by defining custom views with the required columns. However, note that only the predefined directory services provided by Oracle Workflow are supported by Oracle. See: Oracle Workflow Support Policy, *Oracle Workflow Developer's Guide*.

Oracle Workflow provides local directory repository tables called WF\_LOCAL\_ROLES and WF\_LOCAL\_USER\_ROLES. These tables should always be included in any implementation of the WF\_USERS, WF\_ROLES, and WF\_USER\_ROLES views.

- WF\_LOCAL\_ROLES stores role information, including a user flag to mark those roles that also represent individual users. This table contains columns similar to those required in the WF\_USERS and WF\_ROLES views.
- WF\_LOCAL\_USER\_ROLES stores information about the associations of users with roles. This table contains columns similar to those required in the WF\_USER\_ROLES view.

Oracle Workflow also provides tables to support extended directory service features.

- WF\_LOCAL\_ROLES\_TL stores translated display name and description values for multiple language support (MLS) in the WF\_USERS and WF\_ROLES views.
- WF\_ROLE\_HIERARCHIES stores information about the hierarchical relationships between roles in Oracle Applications.
- WF\_USER\_ROLE\_ASSIGNMENTS stores information about the direct and inherited assignments of users to roles in Oracle Applications.

For the standalone version of Oracle Workflow, if you are integrating with Oracle Internet Directory, the Workflow local tables store user information that is retrieved from and synchronized with Oracle Internet Directory, as well as Workflow role information that is entered and stored locally. If you are integrating with Oracle Database users or a custom directory service repository, you can use these tables to store ad hoc users and roles not included in your existing tables. You can create such ad hoc users and roles in the Workflow local tables by calling the appropriate Workflow directory service PL/SQL APIs.

**Note:** If you implement Oracle Internet Directory integration, you must not create ad hoc users in the Workflow local tables, because you risk discrepancies in your user information and unpredictable results if you use any tool other than Oracle Internet Directory to maintain users after integrating with Oracle Internet Directory. You can still use ad hoc roles, however, since Workflow roles are not maintained through Oracle Internet Directory. See: *Synchronizing Workflow Directory Services with Oracle Internet Directory*, page 2-40.

For Oracle Workflow embedded in Oracle Applications, the Workflow local tables now store denormalized user and role information originating from various other Oracle Applications modules, so that the directory service views can access this information with good performance. You can also use these tables to store ad hoc users and roles by calling the appropriate Workflow directory service PL/SQL APIs.

In both standalone Oracle Workflow and Oracle Applications, you should periodically purge ad hoc users and roles from the Workflow local tables after they have expired in order to improve performance. See: *Directory, Oracle Workflow API Reference*.

See: *Workflow Directory Service APIs, Oracle Workflow API Reference*, *Ad Hoc Users and Roles, Oracle Workflow Developer's Guide*, and *Oracle Workflow Security*, page 3-1.

### **Setting Up a Directory Service for Standalone Oracle Workflow:**

If you are using the standalone version of Oracle Workflow, you can choose to implement either one of the two predefined directory services. Oracle Workflow provides scripts that

you can run to implement these directory service environments, creating view definitions for the WF\_USERS, WF\_ROLES, and WF\_USER\_ROLES views. See: Workflow Directory Service Views, page 2-30.

- You can integrate your Workflow directory service with Oracle Internet Directory as your directory repository. See: Integrating Oracle Workflow Directory Services with Oracle Internet Directory, page 2-21 and Synchronizing Workflow Directory Services with Oracle Internet Directory, page 2-40.
- You can also implement a directory service that is integrated with Oracle Database users. See: Integrating Oracle Workflow Directory Services with Oracle Database Users, page 2-22.

**Note:** Additionally, you can create your own directory service by defining custom views based on the database tables that make up your directory repository, provided that you define the required columns and also map to the WF\_LOCAL\_ROLES and WF\_LOCAL\_USER\_ROLES tables for users and roles that are not stored in your repository. If you choose to do so, you can either create new view definitions, or you can edit and run a copy of one of the provided scripts. However, note that only the predefined directory service views provided by Oracle Workflow are supported by Oracle. See: Oracle Workflow Support Policy, *Oracle Workflow Developer's Guide*.

### Integrating an Oracle Workflow Directory Service with Oracle Internet Directory

If you are using the standalone version of Oracle Workflow, you can integrate your Workflow directory service with Oracle Internet Directory as your directory repository. In this case, Oracle Workflow provides a directory service implementation that maps the directory service views only to the Workflow local tables, because only the users in the WF\_LOCAL\_ROLES table with their user flag set to Y will be synchronized with Oracle Internet Directory. (Only users are maintained through Oracle Internet Directory, not Workflow roles.) After implementing Oracle Internet Directory integration, you maintain your user information only through Oracle Internet Directory. See: Synchronizing Workflow Directory Services with Oracle Internet Directory, page 2-40.

You can also use this directory service implementation if your users and roles are not stored in any existing directory repository, and you want to enter all your user and role information directly in the Workflow local tables. In this case the WF\_LOCAL\_ROLES, WF\_LOCAL\_ROLES\_TL, and WF\_LOCAL\_USER\_ROLES tables become your primary directory repository tables.

Oracle Workflow provides a script named `wfdircsv.sql` which you can run to set up the views mapped only to the Workflow local tables. The `wfdircsv.sql` script is located in the `ORACLE_HOME/wf/sql` directory on your server. This script creates three views, WF\_USERS, WF\_ROLES, and WF\_USER\_ROLES. See: Workflow Directory Service Views, page 2-30.

The originating system in the WF\_USERS view is called WF\_LOCAL\_USERS, and the originating system ID is 0.

The WF\_ROLES view includes all users and roles defined in WF\_LOCAL\_ROLES, regardless of the user flag. The originating system is WF\_LOCAL\_ROLES and the originating system ID is 0.

The WF\_USER\_ROLES view consists of the names and originating system information of both users and roles in WF\_USERS and WF\_ROLES, associating users with the roles of which they are members.

**Note:** If you do not want to implement Oracle Internet Directory integration, but you choose to define custom views, you can use the `wfdircsv.sql` script to begin your custom definitions by creating a copy of this script and editing it to incorporate your own directory repository tables in addition to the Workflow local tables. However, note that only the predefined directory service views provided by Oracle Workflow are supported by Oracle. See: Oracle Workflow Support Policy, *Oracle Workflow Developer's Guide*.

If you implement Oracle Internet Directory integration, you must not customize the view definitions to incorporate any tables other than the Workflow local tables, because only the users in the WF\_LOCAL\_ROLES table with their user flag set to Y will be synchronized with Oracle Internet Directory.

### Integrating an Oracle Workflow Directory Service with Oracle Database Users

If you are using the standalone version of Oracle Workflow, you can map your directory service to the native users and roles in the Oracle Database. In this case you base your views on the tables DBA\_USERS, DBA\_ROLES, and WF\_LOCAL\_ROLES.

Oracle Workflow provides a script named `wfdirouv.sql` which you can use to set up the views. The `wfdirouv.sql` script is located in the `ORACLE_HOME/wf/sql` directory. This script is automatically run by the Oracle Workflow Configuration Assistant when you install the standalone version of Oracle Workflow. The script creates the three directory service views, WF\_USERS, WF\_ROLES, and WF\_USER\_ROLES. See: Workflow Directory Service Views, page 2-30.

The WF\_USERS view creates a workflow user for each DBA user and any users stored in WF\_LOCAL\_ROLES. For each DBA user, the originating system is called ORACLE, and the originating system ID is the USERNAME column in DBA\_USERS. The default notification preference for each DBA user is MAILHTML.

The WF\_ROLES view includes all users in the WF\_USERS view, all roles defined in the WF\_LOCAL\_ROLES table, and all roles in DBA\_ROLES, where `role_name` begins with WF. For each DBA role, the originating system is ORACLE and the originating system ID is the ROLE column in DBA\_ROLES. The default notification preference for each DBA role is MAILHTML.

The WF\_USER\_ROLES view consists of the names and originating system information of both users and roles in WF\_USERS and WF\_ROLES, associating users with the roles of which they are members.

The `wfdirouv.sql` script sets each native Oracle user's e-mail address to the user's respective username. If you want users to be able to receive e-mail notifications, as a minimal setup step, you should edit the `wfdirouv.sql` script to either link your native Oracle users to an existing mail directory store through the WF\_ROLES view definition, or, if the usernames and e-mail account names match, then simply add the domain for your organization, such as '@oracle.com', to the usernames in the WF\_USERS view definition. Typically, the columns that you change are EMAIL\_ADDRESS in WF\_USERS and EMAIL\_ADDRESS in WF\_ROLES.

Additionally, you should grant each database user who is a Workflow user the `wf_plsql_ui` database role. This role provides users the privileges to access the Oracle Workflow Web pages. Use the `GRANT SQL` statement to grant the role to users. For example:

```
grant wf_plsql_ui to username;
```

See: `GRANT`, *Oracle Database SQL Reference*.

## Setting Up a Directory Service for Oracle Workflow Embedded in Oracle Applications:

In Oracle Applications, Oracle Workflow uses a directory service model in which denormalized information is maintained in the Workflow local tables for performance gain. The Workflow local tables store user and role information originating from various other Oracle Applications modules, as well as ad hoc users and roles, so that the `WF_USERS`, `WF_ROLES`, `WF_USER_ROLES`, and `WF_USER_ROLE_ASSIGNMENTS_V` views can access this information with good performance. You should maintain synchronization between the user and role information stored in application tables by the source modules and the information stored in the Workflow local tables.

### Directory Service Views for Oracle Applications

The predefined `WF_USERS`, `WF_ROLES`, `WF_USER_ROLES`, and `WF_USER_ROLE_ASSIGNMENTS_V` directory service views for Oracle Workflow embedded in Oracle Applications are now based solely on the Workflow local tables where the denormalized information is stored. These view definitions are automatically created for you during installation. See: Workflow Directory Service Views, page 2-30.

- `WF_USERS` is based on `WF_LOCAL_ROLES` where the user flag is set to Y and on `WF_LOCAL_ROLES_TL`.
- `WF_ROLES` is based on `WF_LOCAL_ROLES` and on `WF_LOCAL_ROLES_TL`.
- `WF_USER_ROLES` is based on `WF_LOCAL_USER_ROLES`.
- `WF_USER_ROLE_ASSIGNMENTS_V` is based on `WF_USER_ROLE_ASSIGNMENTS`.

**Note:** You can customize your directory service by creating your own custom view definitions, provided that you define the required columns and map to the Workflow local tables. However, note that only the predefined directory service views provided by Oracle Workflow are supported by Oracle. See: Oracle Workflow Support Policy, *Oracle Workflow Developer's Guide*.

In Oracle Applications, the only roles in `WF_LOCAL_ROLES` that are marked as individual users with the user flag set to Y are roles that represent Oracle Applications users, originating from the `FND_USER` table, roles that represent Oracle Trading Community Architecture (TCA) person parties, roles that represent TCA contacts (relationship parties), or roles that represent ad hoc users. Records originating from other application tables are treated solely as roles, with the user flag set to N. The `WF_LOCAL_USER_ROLES` table is used to associate Oracle Applications users, TCA person parties, and TCA contacts with roles defined by other applications.

**Note:** An Oracle Applications user may be associated with an Oracle Human Resources person. In this case, some person information is combined into the user's record in WF\_LOCAL\_ROLES. In such a combined record, the originating system is changed from FND\_USR to PER, and the display name is taken from Oracle Human Resources, while the internal name is the Oracle Applications user name from FND\_USER, and the user flag is still set to Y.

Each Oracle Human Resources person is also represented in WF\_LOCAL\_ROLES as a role with the originating system PER\_ROLE and the user flag set to N. This record remains unaffected whether the person is linked to an Oracle Applications user or not.

The following table summarizes the different ways in which Oracle Applications users and Oracle Human Resources people are stored in WF\_LOCAL\_ROLES.

**Oracle Applications Users and Oracle Human Resources People in WF\_LOCAL\_ROLES**

Type of Role	Orig_System	User_Flag
Oracle Applications user, not linked to an Oracle Human Resources person	FND_USR	Y
Oracle Applications user linked to an Oracle Human Resources person	PER	Y
Oracle Human Resources person	PER_ROLE	N

To link an Oracle Applications user to an Oracle Human Resources person, navigate to the Users window in Oracle Applications and select the appropriate person name in the Person field for that user. See: *Users Window, Oracle Applications System Administrator's Guide*.

You should only link an Oracle Human Resources person to one Oracle Applications user. If a person is linked to more than one user, notifications for that person may become inaccessible, and workflow processes may be halted while waiting for those notifications to be completed. Additionally, assigning a person to multiple users may cause errors in other Oracle Applications modules as well. For this reason, you must not link an Oracle Human Resources person to more than one Oracle Applications user.

The WF\_LOCAL\_ROLES and WF\_LOCAL\_USER\_ROLES tables are partitioned by the originating system within Oracle Applications that was the source of the denormalized information. This partitioning provides faster data access and also allows each originating system to be synchronized with the Workflow local tables individually. Each table also includes a separate partition that contains ad hoc users and roles as well as data from any system that does not have its own partition.

The partition information for each originating system is stored in the WF\_DIRECTORY\_PARTITIONS table. There are partitions for the following systems:

- WF\_LOCAL\_ROLES - Ad hoc users and roles, as well as data from any originating system that does not have its own partition
- FND\_USR - FND users, which may or may not be linked to Oracle Human Resources people
- FND\_RESP - FND responsibilities
- PER\_ROLE - HR people
- POS - HR positions
- AMV\_APPR - MarketView approvals
- AMV\_CHN - MarketView channels
- ENG\_LIST - Engineering approval list
- HZ\_GROUP - TCA groups
- HZ\_PARTY - TCA person parties and contacts
- GBX - Federal HR group boxes
- HTB\_SEC - This partition does not participate in bulk synchronization.
- PQH\_ROLES - Position Control roles
- UMX - User Management roles. This partition does not participate in bulk synchronization.

**Note:** Normally each partition contains only records that originate from the corresponding system. However, the FND\_USR partition can contain both roles with an originating system value of FND\_USR, which are unlinked Oracle Applications users, and roles with an originating system value of PER, which are Oracle Applications users that are linked to Oracle Human Resources people.

See: Ad Hoc Users and Roles, *Oracle Workflow Developer's Guide*.

You can run a diagnostic test through Oracle Diagnostics to check that there are no duplicate roles in the WF\_LOCAL\_ROLES table. See: Oracle Workflow Diagnostic Tests, page D-1.

### **Synchronizing Workflow User and Role Information**

For each Oracle Applications module that is a source of Oracle Workflow user and role information, the information stored in the source application tables must be synchronized with the denormalized information in the Workflow local tables. The Workflow local synchronization APIs are used to perform this synchronization.

## Incremental Synchronization

Oracle Workflow automatically performs an initial synchronization of the user and role information in all the related originating systems during installation. Subsequently, you must continue synchronizing the user and role information from the source modules with the Workflow local tables. For each Oracle Applications module that stores user and role information in its application tables, a patch will be made available to automatically synchronize that information with the information in the Workflow local tables on an incremental basis, using the Workflow local synchronization APIs. For details on the patches that are currently available, please refer to Oracle*MetaLink* note 171703.1, *Implementing Oracle Workflow Directory Service Synchronization*.

## Bulk Synchronization

Until these incremental synchronization patches are released, you can run a concurrent program named Synchronize WF LOCAL Tables to perform synchronization in bulk, periodically refreshing the information in the Workflow local tables for the affected modules. This concurrent program is provided as an interim method to synchronize the Workflow local tables with the user and role information stored in the product application tables until each affected product performs the synchronization automatically.

Oracle Workflow provides a request set named Synchronize Workflow LOCAL Tables that contains ten instances of the Synchronize WF Local Tables program, one for each originating system. You can use this request set to submit requests for all the originating systems at once. Note that because this program is incompatible with itself, each request is defined as a separate stage and the stages will run sequentially. By default, this request set is scheduled to run once a day to provide a minimal level of synchronization. You can modify the schedule for the request set to perform synchronization more frequently.

You only need to run the bulk synchronization program for products for which you do not have an incremental synchronization patch installed. After applying the patch for a product, you no longer need to run the program for originating systems owned by that product.

- After applying the patch for a product, remove the program instance for each of that product's originating systems from the Synchronize Workflow LOCAL Tables request set. See: Defining Request Sets, *Oracle Applications System Administrator's Guide*.
- Also, do not submit any further single requests for the Synchronize WF LOCAL Tables program for that product's originating systems.

**Note:** You can still use the bulk synchronization program to synchronize the product's data for troubleshooting and diagnostic purposes, if necessary.

**Note:** Products that use role hierarchies do not participate in bulk synchronization. These products must perform incremental synchronization.



### **To submit the Synchronize Workflow LOCAL Tables request set**

1. Navigate to the Submit Requests form in Oracle Applications (System Administrator: Requests > Run). See: Running Reports and Programs, *Oracle Applications User's Guide*.
2. Choose to run a request set and select Synchronize Workflow LOCAL Tables as the request set to run.
3. Enter the values you want for the following parameters.
  - Parallel Processes - Enter the number of parallel processes to run. The default value for this parameter is 1. However, if your hardware resources allow, you can optionally set this parameter to a higher value in order to parallelize the queries during execution of the program.
  - Logging - Select the logging mode you want. This mode determines whether redo log data is generated for database operations performed by the bulk synchronization process. The default value for this parameter is LOGGING, which generates redo log data normally. You can optionally set the logging mode to NOLOGGING to suppress redo log data, obtaining a performance gain. Without this redo log data, no media recovery is possible for the Workflow directory tables and indexes, requiring that you re-run the bulk synchronization process in the event of a media recovery scenario. One additional scenario that would require the process to be re-run is when you open a standby database, whose maintenance also depends on redo log data.
4. Select the print and run options you want to define the schedule for this request set, and choose Submit to submit the requests.

### **To submit a single request for the Synchronize WF LOCAL Tables concurrent program**

1. Navigate to the Submit Requests form in Oracle Applications (System Administrator: Requests > Run). See: Running Reports and Programs, *Oracle Applications User's Guide*.
2. Choose to run a single request and select the Synchronize WF LOCAL Tables concurrent program as the request to run.
3. In the Parameters window, enter the values you want for the following parameters:
  - Orig System - Select the name of the originating system whose user and role information you want to synchronize with the WF\_LOCAL tables. These system names are stored in the FND\_WF\_ORIG\_SYSTEMS lookup type. You can select the following systems:
    - AMV\_APPR - MarketView Approvals
    - AMV\_CHN - MarketView Channels
    - ENG\_LIST - Engineering Approval List
    - FND\_RESP - FND Responsibilities
    - FND\_USR - FND Users

- GBX - Federal HR Group Boxes
  - HZ\_GROUP - TCA Groups
  - HZ\_PARTY - TCA Parties
  - PER\_ROLE - HR People
  - POS - HR Positions
  - PQH\_ROLES - Position Control Roles
  - Parallel Processes - Enter the number of parallel processes to run. The default value for this parameter is 1. However, if your hardware resources allow, you can optionally set this parameter to a higher value in order to parallelize the queries during execution of the program.
  - Logging - Select the logging mode you want. This mode determines whether redo log data is generated for database operations performed by the bulk synchronization process. The default value for this parameter is `LOGGING`, which generates redo log data normally. You can optionally set the logging mode to `NOLOGGING` to suppress redo log data, obtaining a performance gain. Without this redo log data, no media recovery is possible for the Workflow directory tables and indexes, requiring that you re-run the bulk synchronization process in the event of a media recovery scenario. One additional scenario that would require the process to be re-run is when you open a standby database, whose maintenance also depends on redo log data.
4. Select the print and run options you want to define the schedule for this request, and choose Submit to submit the request. You can submit multiple requests for this program to perform synchronization for different originating systems at different frequencies. However, note that because this program is incompatible with itself, only one request for the program can run at a time.

**Note:** Additionally, you must not run bulk synchronization using APIs or scripts from SQL\*Plus while you are running the Synchronize WF LOCAL Tables concurrent program or the Synchronize Workflow LOCAL Tables request set, as the two processes will interfere with each other.

### How Bulk Synchronization Is Performed

The bulk synchronization program retrieves user and role information from an originating system through views that present the information that was formerly included in the previous implementation of the Workflow directory service views. Each originating system provides two new views, one that contains the same columns as `WF_ROLES` and one that contains the same columns as `WF_USER_ROLES`.

**Note:** Originating systems that use role hierarchies do not participate in bulk synchronization. These originating systems must perform incremental synchronization.

For backward compatibility, the originating systems' synchronization views must present exactly the same user and role information that was included for that system in the previous implementation of the Workflow directory service views. The information must be presented in the format required by Oracle Workflow, with no duplicates. For example, the internal name for a user or role must be sourced from a column that is no longer than 320 characters. It is recommended that internal names be all uppercase. If the source table in the originating system does not have a column that meets these criteria, the internal name should be defined to be `<orig_system>:<orig_system_id>` instead, so that Oracle Workflow can reference the original base table where users or roles are stored and a unique user or role in that table.

**Note:** If internal names in all uppercase are used, the names should be initially entered in the database in all uppercase. Forcing the names to uppercase in the view definition results in poor performance when accessing these views.

**Note:** You can customize these originating system synchronization view definitions to specify the data you want to include in bulk synchronization, provided that your customized views meet the requirements listed above. However, note that the originating systems that have implemented incremental synchronization will also be propagating user and role information to the Workflow local tables automatically, so the synchronization views used for bulk synchronization are not the only source of data for Oracle Workflow. Also note that only the predefined synchronization views provided by Oracle Applications are supported by Oracle. See: Oracle Workflow Support Policy, *Oracle Workflow Developer's Guide*.

When you run the bulk synchronization program for a particular originating system, the program extracts the role and user/role association information from that system's synchronization views and loads the information into staging tables. The program then performs a partition exchange between the staging tables and the WF\_LOCAL\_ROLES, WF\_LOCAL\_ROLES\_TL, WF\_LOCAL\_USER\_ROLES, and WF\_USER\_ROLE\_ASSIGNMENTS tables to update the partitions for that system in the Workflow local tables. Finally, the staging tables are truncated.

**Note:** The bulk synchronization program does not store or modify any information in the WF\_LOCAL\_ROLES partitions within the WF\_LOCAL\_ROLES and WF\_LOCAL\_USER\_ROLES tables that contain ad hoc users and roles.

## Role Hierarchies

In Oracle Applications, roles can be related to each other in a hierarchy so that users assigned to one role automatically inherit membership in its superior roles as well. Role hierarchies enable role-based access control in Oracle Applications.

For example, a company could define a role hierarchy with three roles: sales manager, sales representative, and employee. A user with the sales manager role automatically inherits the sales representative role, and a user with the sales representative role automatically inherits the employee role. If user A is assigned directly to the sales representative role, then user A will also have an inherited assignment to the employee role. If user B is assigned directly to the sales manager role, user B will also have inherited assignments to both the sales representative role and the employee role.

Oracle Workflow stores hierarchical relationships between roles in the WF\_ROLE\_HIERARCHIES table. Oracle Workflow also stores denormalized information about direct and inherited assignments of users to roles in the WF\_USER\_ROLE\_ASSIGNMENTS table for performance gain. If a user is associated with a certain role through more than one direct or inherited assignment, the WF\_USER\_ROLE\_ASSIGNMENTS table tracks which assignments are currently valid and expires the user/role association only when all assignments have ended.

**Note:** Originating systems that use role hierarchies do not participate in bulk synchronization. These originating systems must perform incremental synchronization.

### Workflow Directory Service Views:

Oracle Workflow relies on views named WF\_USERS, WF\_ROLES, WF\_USER\_ROLES, and, in Oracle Applications only, WF\_USER\_ROLE\_ASSIGNMENTS\_V, to reference user and role information. Other views provide further access to Workflow directory service data, including WF\_ALL\_ROLES\_VL, WF\_ALL\_USER\_ROLES, and, in Oracle Applications only, WF\_ALL\_USER\_ROLE\_ASSIGNMENTS.

If you are using the standalone version of Oracle Workflow, you can choose to implement definitions for these views from one of two predefined directory services provided by Oracle Workflow, which let you either integrate with Oracle Internet Directory as your directory repository or use Oracle Database users and roles for your directory service. If you are using the version of Oracle Workflow embedded in Oracle Applications, directory service views for the unified Oracle Applications environment are automatically defined for you during installation.

**Note:** An expiration date can be assigned to each role in WF\_LOCAL\_ROLES, each user/role association in WF\_LOCAL\_USER\_ROLES, and each user/role assignment in WF\_ROLE\_HIERARCHIES. After that date, an expired role is no longer included in the predefined WF\_USERS and WF\_ROLES view, an expired user/role association is no longer included in the predefined WF\_USER\_ROLES view, and an expired user/role assignment is no longer included in the WF\_USER\_ROLE\_ASSIGNMENTS\_V view.

However, note that although the expired rows no longer appear in these views, they still exist in the Workflow local tables. You should periodically purge expired ad hoc users and roles using the WF\_PURGE.Directory() API in order to improve performance. See: *Directory, Oracle Workflow API Reference*.

You can also create your own directory service by defining custom views with the required columns. However, note that only the predefined directory services provided

by Oracle Workflow are supported by Oracle. See: Oracle Workflow Support Policy, *Oracle Workflow Developer's Guide*.

If you create your own custom view definitions:

- Each individual user identified by WF\_USERS must also appear in the WF\_ROLES view as a role.
- You should set the user flag in the underlying tables to Y for all the roles that also represent individual users, and set the user flag to N for all other roles.
- You should include the WF\_LOCAL\_ROLES and WF\_LOCAL\_USER\_ROLES tables in the view definitions. You can optionally also include the WF\_LOCAL\_ROLES\_TL table for multiple language support.
- You should avoid selecting from DUAL to incorporate additional users and roles into the directory service views as this allows you to violate the unique constraint on certain columns of the views and reduces performance with unnecessary joins between the 'select from DUAL' statements.
- To take advantage of unique indexes when querying users, make sure you initially enter the usernames in your database in uppercase only. Forcing the usernames to uppercase in your view definition results in poor performance when accessing these views.
- You should run the script wfdirchk.sql to validate your directory service data model. This script is located on your server in the `ORACLE_HOME/wf/admin/sql` directory for the standalone version of Oracle Workflow or in the `$FND_TOP/sql` directory for the version of Oracle Workflow embedded in Oracle Applications. See: Wfdirchk.sql, page 7-7.

**Note:** Avoid making a join to a view that contains a union, as this results in poor database performance. The Oracle Database is unable to preserve the indexes in that view when you make such a join. The workflow directory service views you create will most likely contain unions; therefore you should not join to them directly. If you need to retrieve data from any of the three directory services views, use the appropriate directory services API. See: Workflow Directory Service APIs, *Oracle Workflow API Reference*.

## WF\_USERS

The WF\_USERS view references information about the individuals in your organization who may utilize Oracle Workflow functionality or receive workflow notifications.

**Note:** In WF\_LOCAL\_ROLES, a role that is an individual user has the user flag set to Y.

**Note:** For Oracle Applications, this view now includes only Oracle Applications users originating from the FND\_USER table, TCA person parties, TCA contacts, and ad hoc users, although an Oracle Applications user record may also include information from Oracle Human Resources if the user is linked to an Oracle Human Resources person.

The WF\_USERS view must contain the following required columns:

- **Name** - The internal name of the user as referenced by the Workflow Engine and Notification System. For example, an internal name for a user can be MBEECH or 009, where 009 represents the user's employee ID.

**Important:** If you define custom views, the Name column must be sourced from a column that is no longer than 320 characters, and it is recommended that the internal name be all uppercase. If your source table does not have a column that meets these criteria, DO NOT use string functions to force these restrictions. Instead, define the Name column to be `<orig_system>:<orig_system_id>` so that Oracle Workflow can reference the original base table where users are stored and a unique user in that table. For example, `PER_PEOPLE:009` could represent a user whose employee ID is 009 and whose record is stored in a personnel table called `PER_PEOPLE`.

- **Display\_Name** - The display name of the user. An example of a display name can be 'Beech, Matthew'.
- **Description** - An optional description of the user.
- **Notification\_Preference** - The method by which this user prefers to receive notifications. A value of `MAILTEXT`, `MAILHTML`, `MAILHTM2`, or `MAILATTH` allows users to receive and respond to notifications by plain text e-mail, HTML-formatted e-mail with attachments, HTML-formatted e-mail without attachments, or by plain text e-mail with HTML attachments, respectively. A value of `QUERY` allows users to query notifications from the Worklist Web page. A value of `DISABLED` indicates that the e-mail address on record for the user is invalid, so no e-mail notifications will be sent; meanwhile the user can only query notifications from the Worklist Web page. Finally, a value of `SUMMARY` or, for Oracle Applications only, `SUMHTML`, allows users to receive periodic e-mail summaries of their open notifications. However, to respond to the individual notifications, they must view the notification in the Worklist Web pages. See: Overview of Notification Handling, *Oracle Workflow User's Guide* and Notification Preferences, page 2-65.

**Note:** A notification preference of `MAILTEXT`, `MAILHTML`, `MAILHTM2`, or `MAILATTH` also allows users to view their notifications in the Worklist Web pages.

**Note:** In Oracle Applications, if no notification preference is provided by the originating system, the notification preference is set to `MAILHTML` by default.

**Note:** If you define custom views, you can map the `Notification_Preference` column over the Oracle Workflow preferences table using the statement below. The benefit of doing so is that you can then globally set the default notification preference for all users in your enterprise using the Global Preferences page in standalone Oracle Workflow or the Workflow Configuration page in Oracle Applications, and let individual users override that default value by changing

their notification preference in the User Preferences page in standalone Oracle Workflow or the Preferences page in Oracle Applications. See: Setting Global User Preferences, page 2-11, Setting User Preferences, *Oracle Workflow User's Guide*, and `get_pref`, *Oracle Workflow Developer's Guide*.

```
NVL(wf_pref.get_pref(USR.USER_NAME,'MAILTYPE'),
'MAILHTML')
```

- **Language** - The value of the database `NLS_LANGUAGE` initialization parameter that specifies the default language-dependent behavior of the user's notification session. The Language column is required and cannot be left null. Refer to your Oracle Database user's guide or installation manual for the list of supported language conventions.

**Note:** In Oracle Applications, for roles that are Oracle Applications users marked with an originating system of `FND_USR` or `PER`, Oracle Workflow uses the `GetRoleInfo()` procedure to find the language for a user, rather than querying this column in the directory service views. `GetRoleInfo()` by default retrieves the language value from the ICX: Language profile option for that Oracle Applications user.

However, if the `WF_PREFERENCE` resource token is defined and set to `FND`, then the `GetRoleInfo()` procedure obtains the language value from the Oracle Workflow preferences table instead.

The `WF_PREFERENCE` resource token is not used in the standalone version of Oracle Workflow.

**Note:** If you define custom views, and, if you are using Oracle Applications, the `WF_PREFERENCE` resource token is set to `FND`, then you can map the Language column over the Oracle Workflow preferences table using the statement below. The benefit of doing so is that you can then globally set the default language for all users in your enterprise and let individual users override that default value by changing their language preference. See: Setting Global User Preferences, page 2-11, Setting User Preferences, *Oracle Workflow User's Guide*, and `get_pref`, *Oracle Workflow Developer's Guide*.

```
NVL(wf_pref.get_pref(USR.USER_NAME,'LANGUAGE'),
<default_language>)
```

**Important:** Make sure that the e-mail templates used by notification mailers to send notifications have been translated by Oracle to the language you wish to set. The standard e-mail templates are delivered in a file called `wfmail.wft` under the subdirectory `$ORACLE_HOME/wf/res/<lang>` for the standalone version of Oracle Workflow or `$FND_TOP/import/<lang>` for the version of Oracle Workflow embedded in Oracle Applications. You can

check the appropriate language subdirectory to verify if the templates have been translated to the language you wish to set. See: *Modifying Your Message Templates*, page 2-80.

- **Territory** - The value of the database `NLS_TERRITORY` initialization parameter that specifies the default territory-dependent formatting used in the user's notification session. The Territory column is required and cannot be left null. Refer to your Oracle Database user's guide or installation manual for the list of supported territory conventions.

**Note:** In Oracle Applications, for roles that are Oracle Applications users marked with an originating system of `FND_USR` or `PER`, Oracle Workflow uses the `GetRoleInfo()` procedure to find the territory for a user, rather than querying this column in the directory service views. `GetRoleInfo()` by default retrieves the territory value from the ICX: Territory profile option for that Oracle Applications user.

However, if the `WF_PREFERENCE` resource token is defined and set to `FND`, then the `GetRoleInfo()` procedure obtains the territory value from the Oracle Workflow preferences table instead.

The `WF_PREFERENCE` resource token is not used in the standalone version of Oracle Workflow.

**Note:** If you define custom views, and, if you are using Oracle Applications, the `WF_PREFERENCE` resource token is set to `FND`, then you can map the `Territory` column over the Oracle Workflow preferences table using the statement below. The benefit of doing so is that you can then globally set the default territory for all users in your enterprise and let individual users override that default value by changing their territory preference. See: *Setting Global User Preferences*, page 2-11, *Setting User Preferences*, *Oracle Workflow User's Guide*, and *get\_pref*, *Oracle Workflow Developer's Guide*.

```
NVL(wf_pref.get_pref(USR.USER_NAME,'TERRITORY'),  
<default_territory>)
```

- **Email\_Address** - A valid electronic mail address for this user or a mail distribution list defined by your electronic mail system.
- **Fax** - A fax number for the user.
- **Orig\_System** - A code that you assign to originating system, which is the directory repository that this view is ultimately based on. For example, if this view is based on the personnel data stored in a Human Resource Management System, `Orig_System` can be defined as `PER`.
- **Orig\_System\_ID** - The primary key that identifies the user in this repository system. For example, `Orig_System_ID` can be defined as the value stored in a column called `PERSON_ID` in a Human Resources database table called `PER_PEOPLE`.



- **Parent\_Orig\_System** - An optional code for the originating system of an entity that you want to mark as being related to this user. For example, a supplier could be marked as the parent of a supplier site.
- **Parent\_Orig\_System\_ID** - The primary key that identifies the parent entity in the parent originating system.

**Note:** If no parent information is provided, the **Parent\_Orig\_System** and **Parent\_Orig\_System\_ID** default to the user's own **Orig\_System** and **Orig\_System\_ID**, respectively.

- **Start\_Date** - The date at which the user becomes valid in the directory service.
- **Status** - The availability of the user to participate in a workflow process. The possible statuses are: active (**ACTIVE**), unavailable for an extended period (**EXTLEAVE**), permanently unavailable (**INACTIVE**), and temporarily unavailable (**TMPLEAVE**). These statuses are also stored in the lookup type called **WFSTD\_AVAILABILITY\_STATUS**.
- **Expiration\_Date** - The date at which the user is no longer valid in the directory service. After this date, the user will no longer appear in the seeded **WF\_USERS** view.
- **Owner\_Tag** - A code to identify the program or application that owns the information for this user.

## **WF\_ROLES**

The **WF\_ROLES** view references information about all the roles in your organization who may utilize Oracle Workflow functionality or receive workflow notifications. This view must contain the following required columns pertaining to the roles in your repository. Those columns that are preceded by an asterisk (\*) are similar to the corresponding columns described for the **WF\_USERS** view.

**Important:** Each user identified by **WF\_USERS** must also appear in the **WF\_ROLES** view as a role. This is a requirement for Oracle Workflow.

**Note:** If a user is a member of a role and the user information such as language and notification preference is different from the role information, the Expand Roles option for a notification addressed to the role determines whether the user information or the role information takes precedence. If the Expand Roles option is not checked and the Notification System delivers the notification to the role, the role information will override the user information. If Expand Roles is checked, however, then each user in the role will receive a separate copy of the notification, and the user information will override the role information.

If a user has a notification preference of **SUMMARY** or **SUMHTML**, and the user is also a member of a multi-user role with a different notification preference such as **MAILHTML**, the Notification System will use the Expand Roles setting to determine whether to deliver the notification according to the role or user notification preference. However, even if Expand Roles is not checked and the notification preference of the role takes precedence, the notification

will still appear in the user's summary message because the notification is part of the user's worklist.

- Name - The internal name of the role as referenced by the Workflow Engine and Notification System.

**Important:** If you define custom views, the Name column must be sourced from a column that is no longer than 320 characters, and it is recommended that the internal name be all uppercase. If your source table does not have a column that meets these criteria, DO NOT use string functions to force these restrictions. Instead, define the Name column to be `<orig_system>:<orig_system_id>` so that Oracle Workflow can reference the original base table where roles are stored and a unique role in that table. For example, "PER\_POSITION:009" could represent a position whose ID is 009 and whose record is stored in the personnel table called PER\_POSITION.

- \*Display\_Name
- \*Description
- \*Notification\_Preference
- \*Language
- \*Territory
- Email\_Address - If the e-mail address is null for a given role, notification mailers send an individual e-mail to each user within the role.
- \*Fax
- \*Orig\_System
- \*Orig\_System\_ID
- \*Parent\_Orig\_System
- \*Parent\_Orig\_System\_ID
- \*Start\_Date
- \*Status
- Expiration\_Date - The date at which the role is no longer valid in the directory service. After this date, the role will no longer appear in the seeded WF\_ROLES view.
- \*Owner\_Tag

### WF\_USER\_ROLES

The WF\_USER\_ROLES view is an intersection of the users and roles in WF\_USERS and WF\_ROLES, showing which users are members of which roles.

**Note:** A role can contain only individual users as its members. It cannot contain another role. However, in Oracle Applications roles can be related to each other in a hierarchy so that users assigned

to one role automatically inherit membership in its superior roles as well.

The WF\_USER\_ROLES view must contain the following required columns:

- User\_Name - The internal name of the user as listed in the view WF\_USERS.
- Role\_Name - The internal name of the role as listed in the view WF\_ROLES.
- User\_Orig\_System - A code that you assign to the user directory repository as listed in the view WF\_USERS.
- User\_Orig\_System\_ID - The primary key that identifies the user in the user directory repository as listed in the view WF\_USERS.
- Role\_Orig\_System - A code that you assign to the role directory repository as listed in the view WF\_ROLES.
- Role\_Orig\_System\_ID - The primary key that identifies the role in the role directory repository as listed in the view WF\_ROLES.
- Start\_Date - The date at which the association of this user with this role becomes valid in the directory service.
- Expiration\_Date - The date at which the association of this user with this role is no longer valid in the directory service. After this date, the user and role association will no longer appear in the seeded WF\_USER\_ROLES view.
- Assignment\_Type - A code indicating how the user was assigned to membership in this role. This column is used only in Oracle Applications.
  - D - The user was directly assigned to this role.
  - I - The user inherited this role through membership in another role.
  - B - The user has both direct and inherited assignments to this role.
- Parent\_Orig\_System - An optional code for the originating system of an entity that you want to mark as being related to this user/role association.
- Parent\_Orig\_System\_ID - The primary key that identifies the parent entity in the parent originating system.

#### **WF\_USER\_ROLE\_ASSIGNMENTS\_V**

The WF\_USER\_ROLE\_ASSIGNMENTS\_V view is an intersection of the users and roles in WF\_USERS and WF\_ROLES, that tracks how assignments of users to roles are made directly or inherited through role hierarchy relationships. The view shows only currently active assignments. This view is used only in Oracle Applications.

The WF\_USER\_ROLE\_ASSIGNMENTS\_V view contains the following columns:

- User\_Name - The internal name of the user as listed in the view WF\_USERS.
- Role\_Name - The internal name of the role as listed in the view WF\_ROLES.
- Assigning\_Role - The role from which the user is inheriting assignment to this role.
- Start\_Date - The date at which the assignment of this user to this role becomes valid in the directory service.
- End\_Date - The date at which the assignment of this user to this role is no longer valid in the directory service.

- **Assignment\_Type** - The way in which the user was assigned to membership in this role, either `DIRECT` or `INHERITED`.

### **WF\_ALL\_ROLES\_VL**

The `WF_ALL_ROLES_VL` view contains role information similar to the `WF_ROLES` view. However, `WF_ALL_ROLES_VL` includes all roles, whether not yet valid, currently valid, or expired.

The `WF_ALL_ROLES_VL` view contains the following columns:

- **Name** - The internal name of the role.
- **Display\_Name** - The display name of the role.
- **Description** - An optional description of the role.
- **Notification\_Preference** - The method by which this role prefers to receive notifications.
- **Language** - The value of the database `NLS_LANGUAGE` initialization parameter that specifies the default language-dependent behavior of the role's notification session.
- **Territory** - The value of the database `NLS_TERRITORY` initialization parameter that specifies the default territory-dependent formatting used in the role's notification session.
- **Email\_Address** - A valid electronic mail address for this role.
- **Fax** - A fax number for the role.
- **Orig\_System** - A code that you assign to originating system on which this view is ultimately based.
- **Orig\_System\_ID** - The primary key that identifies the role in the originating system.
- **Start\_Date** - The date at which the role becomes valid in the directory service.
- **Status** - The availability of the role to participate in a workflow process. The possible statuses are: active (`ACTIVE`), unavailable for an extended period (`EXTLEAVE`), permanently unavailable (`INACTIVE`), and temporarily unavailable (`TMPLEAVE`). These statuses are also stored in the lookup type called `WFSTD_AVAILABILITY_STATUS`.
- **Expiration\_Date** - The date at which the role is no longer valid in the directory service.
- **Owner\_Tag** - A code to identify the program or application that owns the information for this role.
- **Created\_By** - Standard Who column.
- **Creation\_Date** - Standard Who column.
- **Last\_Updated\_By** - Standard Who column.
- **Last\_Update\_Date** - Standard Who column.
- **Last\_Update\_Login** - Standard Who column.

## **WF\_ALL\_USER\_ROLES**

The WF\_ALL\_USER\_ROLES view contains user/role association information similar to the WF\_USER\_ROLES view. However, WF\_ALL\_USER\_ROLES includes all user/role associations, whether not yet valid, currently valid, or expired.

The WF\_ALL\_USER\_ROLES view contains the following columns:

- User\_Name - The internal name of the user.
- Role\_Name - The internal name of the role .
- User\_Orig\_System - A code that you assign to the user directory repository.
- User\_Orig\_System\_ID - The primary key that identifies the user in the user originating system.
- Role\_Orig\_System - A code that you assign to the role directory repository.
- Role\_Orig\_System\_ID - The primary key that identifies the role in the role originating system.
- Parent\_Orig\_System - An optional code for the originating system of an entity that you want to mark as being related to this user/role association.
- Parent\_Orig\_System\_ID - The primary key that identifies the parent entity in the parent originating system.
- Assignment\_Type - A code indicating how the user was assigned to membership in this role. This column is used only in Oracle Applications.
  - D - The user was directly assigned to this role.
  - I - The user inherited this role through membership in another role.
  - B - The user has both direct and inherited assignments to this role.
- Start\_Date - The date at which the association of this user with this role becomes valid in the directory service.
- Expiration\_Date - The date at which the association of this user with this role is no longer valid in the directory service.
- Owner\_Tag - A code to identify the program or application that owns the information for the association of this user with this role.
- Created\_By - Standard Who column.
- Creation\_Date - Standard Who column.
- Last\_Updated\_By - Standard Who column.
- Last\_Update\_Date - Standard Who column.
- Last\_Update\_Login - Standard Who column.

## **WF\_ALL\_USER\_ROLE\_ASSIGNMENTS**

The WF\_ALL\_USER\_ROLE\_ASSIGNMENTS view contains information about how assignments of users to roles are made directly or inherited through role hierarchy relationships, similar to the WF\_USER\_ROLE\_ASSIGNMENTS\_V view. However, WF\_ALL\_USER\_ROLE\_ASSIGNMENTS includes all user/role assignments, whether not yet valid, currently valid, or expired. This view is used only in Oracle Applications.

The WF\_ALL\_USER\_ROLE\_ASSIGNMENTS view contains the following columns:

- User\_Name - The internal name of the user.
- Role\_Name - The internal name of the role .
- Assigning\_Role - The role from which the user is inheriting assignment to this role.
- Start\_Date - The date at which the assignment of this user to this role becomes valid in the directory service.
- End\_Date - The date at which the assignment of this user to this role is no longer valid in the directory service.
- Assignment\_Type - The way in which the user was assigned to membership in this role, either `DIRECT` or `INHERITED`.
- Created\_By - Standard Who column.
- Creation\_Date - Standard Who column.
- Last\_Updated\_By - Standard Who column.
- Last\_Update\_Date - Standard Who column.
- Last\_Update\_Login - Standard Who column.

## Step 4: Synchronizing Workflow Directory Services with Oracle Internet Directory

If you are using the standalone version of Oracle Workflow, you can synchronize the user information in your Workflow directory service with Oracle Internet Directory using Lightweight Directory Access Protocol (LDAP). This integration is recommended because it enables you to manage and publish user information in a central location which various systems can reference.

Synchronization with Oracle Internet Directory enables Oracle Workflow to do the following:

- Assign ownership of work items and send notifications to users defined in Oracle Internet Directory.
- Synchronize with other external user directories that are synchronized with Oracle Internet Directory.
- Participate in single sign-on through LDAP external authentication with Oracle Application Server Single Sign-On Server, if you have installed Oracle Application Server. With single sign-on, a user who is logged into any participating Oracle Application Server component is automatically authenticated when accessing any other participating component and does not need to log in again.

**Important:** To implement single sign-on integration, you must install Oracle Workflow shipped with Oracle Application Server, and you must use a version of the Oracle Database that is certified with your version of Oracle Application Server.

For more information about leveraging the Oracle Identity Management infrastructure, see: Oracle Workflow Security, page 3-1.

## Oracle Internet Directory:

Oracle Internet Directory is a general purpose directory service that enables fast retrieval and centralized management of information about dispersed users and network resources. It combines Lightweight Directory Access Protocol (LDAP) Version 3 with the high performance, scalability, robustness, and availability of the Oracle Database.

LDAP is a standard, extensible directory access protocol. It is a common language that LDAP clients and servers use to communicate. LDAP was conceived as an internet-ready, lightweight implementation of the International Standardization Organization (ISO) X.500 standard for directory services. It requires a minimal amount of networking software on the client side, which makes it particularly attractive for internet-based, thin client applications.

The advantages of Oracle Internet Directory include:

- Scalability - Oracle Internet Directory exploits the strengths of the Oracle Database, enabling support for terabytes of directory information. In addition, such technologies as multithreaded LDAP servers and database connection pooling allow it to support thousands of concurrent clients with subsecond search response times.

Oracle Internet Directory also provides data management tools, such as Oracle Directory Manager and a variety of command-line tools, for manipulating large volumes of LDAP data.

- High availability - Oracle Internet Directory is designed to meet the needs of a variety of important applications. For example, it supports full, multimaster replication between directory servers: If one server in a replication community becomes unavailable, then a user can access the data from another server. Information about changes made to directory data on a server is stored in special tables on the Oracle Database. These are replicated throughout the directory environment by Oracle Replication, a robust replication mechanism.

Oracle Internet Directory also takes advantage of all the availability features of the Oracle Database. Because directory information is stored securely in the Oracle Database, it is protected by the backup capabilities of the database. Additionally, the Oracle Database, running with large datastores and heavy loads, can recover from system failures quickly.

- Security - Oracle Internet Directory offers comprehensive and flexible access control. An administrator can grant or restrict access to a specific directory object or to an entire directory subtree. Moreover, Oracle Internet Directory implements three levels of user authentication: anonymous, password-based, and certificate-based using Secure Socket Layer (SSL) Version 3 for authenticated access and data privacy.
- Synchronization with other directories - Oracle Internet Directory includes the Oracle Directory Integration platform that enables you to synchronize with other enterprise repositories, including third-party LDAP directories.

Oracle Application Server Single Sign-On uses Oracle Internet Directory to store user entries. It maps users for any partner application to user entries in Oracle Internet Directory entries, and authenticates them by using LDAP mechanisms.

See: *Oracle Internet Directory Administrator's Guide*.

## Oracle Application Server Single Sign-On:

Oracle Application Server Single Sign-On is a component of Oracle Application Server that provides a framework for secure single sign-on, allowing users to log in to multiple Web-based applications by entering a user name and password only once.

**Important:** To implement single sign-on integration for Oracle Workflow, you must install Oracle Workflow shipped with Oracle Application Server, and you must use a version of the Oracle Database that is certified with your version of Oracle Application Server.

Oracle Application Server Single Sign-On provides the following benefits:

- Ease of administration and reduced administrative costs, because user names and passwords can be stored and maintained outside of any particular application and shared across the enterprise
- Convenient login experience, because users do not need to maintain a separate username and password for each application they access
- Increased security, because when the password is only required once, users are less likely to use simple, easy-to-remember passwords or write them down

The core of the Oracle Application Server Single Sign-On technology is the Login Server. The Login Server authenticates users and passes their identities to the partner applications that are integrated with it.

Partner applications support a single sign-on mechanism that enables them to accept a user's username and password as validated by the Login Server. A partner application delegates its authentication to the Login Server. If a partner application is registered with the Login Server, users can log into it using the single sign-on mechanism.

With `mod_osso`, an Oracle module that enables single sign-on, Oracle HTTP Server becomes a partner application of the Login Server. Oracle Workflow uses Oracle HTTP Server as its Web server. If you implement Oracle Internet Directory/Single Sign-On integration, Oracle Workflow participates in single sign-on by using `mod_osso` to authenticate access to its secured Web pages.

When a user first tries to access a secured Workflow Web page, the Workflow security package `WFA_SEC` checks the CGI environment variable `REMOTE_USER` for user information. If the user is not already logged in to Oracle Workflow or another Oracle Application Server Single Sign-On participating application, the user will be prompted to log in before the page appears.

**Note:** The `WFA_SEC` package is loaded as a post-install configuration step if you choose to implement Oracle Internet Directory/Single Sign-On integration. For more information, see your installation documentation.

To set the variable `REMOTE_USER`, Oracle HTTP Server internally calls to `mod_osso`. Acting as an Oracle Application Server Single Sign-On partner application, `mod_osso` transparently redirects the user to the Login Server to obtain authentication credentials, if no application cookie is present.

The Login Server performs the following steps:

- Prompts the user for the user name and password, if no login cookie is present.
- Authenticates the user by means of the user name and password, using external repository authentication that relies on an LDAP-compliant directory, specifically



Oracle Internet Directory. The Login Server binds to Oracle Internet Directory and then looks up the user credentials stored in the directory.

- Stores an encrypted login cookie on the authenticated client.
- Transparently redirects the user to the partner application, `mod_osso`, by using a URL with an encrypted parameter containing the user's identity.

Oracle HTTP Server with `mod_osso` then performs the following steps:

- Decrypts the parameter.
- Identifies the user.
- Establishes its own session management (for example, determining what, if any, access privileges to grant to the user).
- Sets a partner application cookie so that subsequent user access does not require a redirect to the Login Server.
- Presents the requested application page to the user.

If, during the same session, the user again seeks access to the same or to a different partner application, the Login Server does not prompt the user for a username and password. Instead, the Login Server obtains the information from the login cookie that is already on the client browser. The login cookie provides the Login Server with the user's identity and indicates that authentication has already been performed. If there is no login cookie, the Login Server presents the user with a login page.

To guard against eavesdropping, the Login Server can send the login cookie to the client browser over an encrypted SSL channel.

The login cookie expires with the session, either at the end of a time interval specified by the administrator, or when the user exits the browser. The login cookie is never written to disk.

**Note:** To log out of a partner application and log in as another user, the user must also log out of the Login Server session. Otherwise, the authentication request returns the partner application to the logged in state of the previous user.

See: *Oracle Application Server Single Sign-On Administrator's Guide* and *Oracle Identity Management Application Developer's Guide*.

## Oracle Internet Directory Synchronization:

Oracle Workflow provides APIs to synchronize the user information in your Workflow directory service with Oracle Internet Directory. These APIs are defined in a PL/SQL package called `WF_LDAP`. See: *Workflow LDAP APIs*, *Oracle Workflow API Reference*.

**Note:** Oracle Internet Directory integration includes only individual users, not user groups. Workflow roles are not maintained through Oracle Internet Directory.

## To Synchronize Workflow Directory Services with Oracle Internet Directory

1. During installation, use the Workflow Configuration Assistant to choose to integrate with Oracle Internet Directory. You enter LDAP preferences in the Workflow Configuration Assistant, which are then stored as global workflow preferences. After installation, you can use the Global Preferences page to

verify that the following preferences are set to the appropriate information for your Oracle Internet Directory installation, and optionally modify these settings. See: Setting Global User Preferences, page 2-11.

- LDAP Host
- LDAP Port
- LDAP User Name
- LDAP Password
- LDAP Changelog Base Directory
- LDAP User Base Directory

**Note:** If you choose to integrate with Oracle Internet Directory during installation, Workflow directory service views that support this integration are automatically implemented for you. See: Integrating Oracle Workflow Directory Services with Oracle Internet Directory, page 2-21.

2. Ensure that the PL/SQL package named DBMS\_LDAP is loaded in your database. This package contains the functions and procedures which can be used to access data from LDAP servers and is required for LDAP synchronization.

For standalone Oracle Workflow, if you choose to integrate with Oracle Internet Directory by entering LDAP preferences in the Workflow Configuration Assistant, this package should be loaded as a pre-installation step. For more information, see the installation documentation for the software with which you installed Oracle Workflow.

3. For single sign-on integration, ensure that the Database Access Descriptor for Oracle Workflow is protected in the mod\_osso configuration file. For standalone Oracle Workflow with Oracle Application Server, if you choose to integrate with Oracle Internet Directory by entering LDAP preferences in the Workflow Configuration Assistant, mod\_osso configuration is automatically performed for you during installation. For more information, see the installation documentation for the software with which you installed Oracle Workflow.

**Important:** To implement single sign-on integration, you must install Oracle Workflow shipped with Oracle Application Server, and you must use a version of the Oracle Database that is certified with your version of Oracle Application Server.

4. If you choose to integrate with Oracle Internet Directory by entering LDAP preferences in the Workflow Configuration Assistant, the Workflow Configuration Assistant performs an initial synchronization for you by running the `WF_LDAP.Synch_all( )` API. This function retrieves all the existing user information from Oracle Internet Directory, based on the LDAP directory information specified in the global workflow preferences, and raises the `oracle.apps.global.user.change` event. Predefined subscriptions to this event create new users in the `WF_LOCAL_ROLES` table if necessary and load the user information into the `WF_LOCAL_ROLES` table.

Because `WF_LDAP.Synch_all( )` retrieves information for all users stored in Oracle Internet Directory, this function should be used only once during setup. If

necessary, however, you can also run *WF\_LDAP.Synch\_all( )* as required for recovery or cleanup.

5. Subsequently, you must maintain the synchronization between your Workflow directory service and Oracle Internet Directory by retrieving and loading only changed Oracle Internet Directory user information. It is recommended that you update the user information every ten minutes.

You can use either *WF\_LDAP.Synch\_changes( )* or *WF\_LDAP.Schedule\_changes( )* to retrieve changed user information from Oracle Internet Directory. *WF\_LDAP.Synch\_changes( )* identifies LDAP user changes in Oracle Internet Directory, including creation, modification, and deletion, by querying the LDAP change log records. The function connects to Oracle Internet Directory based on the LDAP directory information specified in the global workflow preferences. If there is a change, the function retrieves the user information from Oracle Internet Directory and raises the `oracle.apps.global.user.change` event. Predefined subscriptions to this event create new users in the *WF\_LOCAL\_ROLES* table if necessary and load the user information into the table. You can use *WF\_LDAP.Synch\_changes( )* to perform a single update.

To continue updating user information periodically, use *WF\_LDAP.Schedule\_changes( )*. This procedure submits a database job using the *DBMS\_JOB* utility to run *WF\_LDAP.Synch\_changes( )* repeatedly at an interval that you specify. The default interval, which is also the recommended frequency to check for updates, is ten minutes.

You can create a script to run *WF\_LDAP.Schedule\_changes( )*. For example, to run the API at an interval of ten minutes, create a SQL file with the following commands:

```
declare
begin
    wf_ldap.schedule_changes(0,0,10);
end;
/
```

Then run SQL\*Plus and load your new script to the database.

**Note:** You must terminate the running of any *WF\_LDAP* APIs before changing your LDAP setup, such as by migrating to a different LDAP server.

**Important:** If you implement Oracle Internet Directory integration, you must maintain your users only through Oracle Internet Directory. You must not create ad hoc users in the *WF\_LOCAL\_ROLES* table, because you risk discrepancies in your user information and unpredictable results if you use any tool other than Oracle Internet Directory to maintain users after integrating with Oracle Internet Directory. Consequently, if you implement Oracle Internet Directory integration, you must not use the *CreateAdHocUser( )*, *SetAdHocUserStatus( )*, *SetAdHocUserExpiration( )*, or *SetAdHocUserAttr( )* APIs in the *WF\_DIRECTORY* package.

You can still use ad hoc roles, however, since Workflow roles are not maintained through Oracle Internet Directory.

See: Setting Global User Preferences, page 2-11, Workflow LDAP APIs, *Oracle Workflow API Reference*, User Entry Has Changed Event, *Oracle Workflow Developer's Guide*, Managing Job Queues, *Oracle Administrator's Guide*, and Workflow Directory Service APIs, *Oracle Workflow API Reference*.

## Step 5: Setting Up Additional Languages

The Oracle Workflow Web pages, your workflow definitions, and workflow notifications can be translated to the languages defined in your Oracle installation. Some of the steps for setting up other languages in addition to English differ for the standalone and embedded versions of Oracle Workflow.

**Note:** You can only display languages that require a multibyte character set if your database uses a character set that supports these languages, such as UTF8. For more information, see: Choosing a Character Set, *Oracle Database Globalization Support Guide*.

### WF\_LANGUAGES View:

To support additional languages, Oracle Workflow uses a view called WF\_LANGUAGES that identifies the languages defined in your Oracle installation. This view is automatically created during installation for both the standalone and the embedded versions of Oracle Workflow. Oracle Workflow uses the WF\_LANGUAGES view to create, in its translatable tables, a row for each language that maps to a row found in the corresponding non-translated base table.

The WF\_LANGUAGES view includes the following columns:

- Code - The language code.
- Display\_Name - The display name of the language.
- NLS\_Language - The value of the Oracle NLS\_LANGUAGE initialization parameter that specifies the default language-dependent behavior of a session.
- NLS\_Territory - The value of the Oracle NLS\_TERRITORY initialization parameter that specifies the default territory-dependant date and numeric formatting of a session.
- NLS\_Codeset - The character set for the language.
- Installed\_Flag - Flag to indicate if the language is installed and available for use.

See: *Oracle Database Globalization Support Guide*.

### To Display Oracle Workflow Web Pages in Other Languages:

- For Oracle Workflow embedded in Oracle Applications, you select and install additional languages as part of the Oracle Applications installation. Users can set their language preference to an installed language through the Personal Homepage in order to view Oracle Applications screens in that language. See: Selecting NLS Settings, *Installing Oracle Applications* and Set Preferences, *Oracle Applications User's Guide*.
- For the standalone version of Oracle Workflow, the server installation and upgrade are available only in English. To support access to Oracle Workflow Web pages in another language, you must load that language after the installation using the

Oracle Workflow Configuration Assistant. See the installation documentation for your release and platform.

The Oracle Workflow Configuration Assistant performs the following tasks to set up a language:

- Runs the script `wfnlena.sql` to enable the language. See: `wfnlena.sql`, page 7-9.
- Runs the script `WFNLADD.sql` to create rows for the enabled language in each workflow object translation table. See: `WFNLADD.sql`, page 7-4.
- Loads translated resource files for the user interface using the Workflow Resource Generator, translated versions of the standard and demonstration workflow definitions using the Workflow Definitions Loader, and translated Business Event System object definitions using the Workflow XML Loader.

If you have multiple languages loaded for Oracle Workflow, as a workflow administrator, you can specify the default language that your users' Web sessions display by setting the Language preference in the Global Preferences page. Individual users can override the default language by setting the Language preference in the User Preferences page. See: *Setting Global User Preferences*, page 2-11 and *Setting User Preferences*, *Oracle Workflow User's Guide*.

**Note:** To display Oracle Workflow Web pages properly, the character sets on the database tier and middle tier must match. The NLS\_LANG value specified in the Database Access Descriptor (DAD) for Oracle Workflow in Oracle HTTP Server should be set to the database character set, using the following format:

`.CHARSET`

Note that it is important to include the period (.) before the character set name in the NLS\_LANG value. For more information, see the installation documentation for your release and platform.

### To Create and View Workflow Definitions in Other Languages using Oracle Workflow Builder:

1. Set the NLS\_LANG environment variable for the new language, territory, and encoded character set that you want to use for the workflow definition. For example, for Windows NT, run the `regedit32` command and locate the NLS\_LANG setting under the `HKEY_LOCAL_MACHINE/SOFTWARE/ORACLE` hierarchy. Double click on NLS\_LANG. Then set the variable to the new value and save your work. Specify the value for NLS\_LANG in the following format:

`LANGUAGE_TERRITORY.CHARSET`

For more information about setting NLS\_LANG, see: *Globalization Support*, *Oracle Database Installation Guide*.

2. Start Oracle Workflow Builder. Create a translated version of your workflow definition and save it as a flat file (`.wft`), or open and view a workflow definition that is already translated.

**Note:** Although you can enter and view property values for your workflow definitions in other languages, the Oracle Workflow Builder user interface is still displayed in English.

### To Load Workflow Definitions in Other Languages to a Database:

1. Ensure that the WF\_LANGUAGES view has been created in your workflow server. This view is automatically created during installation.
2. Ensure that the language you want is set up in the database.
  - For Oracle Workflow embedded in Oracle Applications, you select and install additional languages as part of the Oracle Applications installation. See: *Selecting NLS Settings, Installing Oracle Applications*.
  - For standalone Oracle Workflow, the server installation automatically adds all available languages to your workflow database. See the installation documentation for your release and platform.
  - For standalone Oracle Workflow, the server installation and upgrade are available only in English. To support access to workflow definitions in another language, you must load that language after the installation using the Oracle Workflow Configuration Assistant. See the installation documentation for your release and platform.
3. Load the translated workflow definition to your workflow database using either the Workflow Definitions Loader or the Workflow Builder.
  - Before running the Workflow Definitions Loader program, you must set the NLS\_LANG environment variable to the appropriate territory and character set for the workflow definition you want to load. The character set must match the character set encoding used to create the workflow definition file, which is determined by the NLS\_LANG value that was set on the client PC before the .wft file was created in the Workflow Builder. For example, if the .wft file was created in the Japanese native character set encoding JA16SJIS, then you must specify JA16SJIS in the character set portion of NLS\_LANG before loading the file, and you cannot specify a different character set such as UTF8.

To set NLS\_LANG before running the Workflow Definitions Loader, use the following format:

```
_TERRITORY.CHARSET
```

Note that it is important to include the underscore ( `_` ) before the territory name and the period ( `.` ) between the territory name and the character set name in the NLS\_LANG value. For example, if the .wft file was created in the Japanese native character set encoding JA16SJIS, set NLS\_LANG to the following value:

```
_JAPAN.JA16SJIS.
```

You do not need to include the language in this NLS\_LANG value because the Workflow Definitions Loader uses the language specified within the .wft file to determine the language to load. See: *Using the Workflow Definitions Loader*, page 6-7.

**Note:** If you create all your translated workflow definition files in Unicode encoding, you can simply set NLS\_LANG to `.UTF8` before loading these files. In this case you will not need to reset NLS\_LANG for translated files in different languages, because the `.UTF8` character set applies to all the files in Unicode encoding.

- Before using the Workflow Builder to save a translated workflow definition to the database, you must set the NLS\_LANG environment variable to the appropriate language, territory, and character set. If you are saving several workflow definitions in different languages, you must reset NLS\_LANG for each language. See: Opening and Saving Item Types, *Oracle Workflow Developer's Guide*.

**Note:** The translated versions of Oracle Workflow's standard and demonstration workflow definitions are provided in native character set encoding, not in UTF8.

### To Send E-mail Notifications in Other Languages:

1. Determine whether Oracle has translated the e-mail notification templates to the language you wish to set by checking for the file containing the templates in the appropriate language subdirectory, `ORACLE_HOME/wf/res/<lang>` for the standalone version of Oracle Workflow or `$FND_TOP/import/<lang>` for the version of Oracle Workflow embedded in Oracle Applications. The standard templates are delivered in a file called `wfmail.wft`. See: Modifying Your Message Templates, page 2-80.
2. If the e-mail templates are available for the desired language, Oracle Workflow uses the language preference for the notification recipient to determine the language for an e-mail notification.
  - Oracle Applications users can set their language preference in the Preferences page. This preference is also stored in the ICX: Language profile option. See: Set Preferences, *Oracle Applications User's Guide*.

**Note:** In Oracle Applications, users can select a session-level language in the login window, which overrides their user-level language preference for that session. However, Oracle Workflow still uses the user-level language preference to determine the language in which e-mail notifications are sent.

- For standalone Oracle Workflow, as the workflow administrator, you can specify the default language setting in the Global Preferences page. Individual users can override the default language setting by specifying their own preferred language in the User Preferences page. See: Setting Global User Preferences, page 2-11 and Setting User Preferences, *Oracle Workflow User's Guide*.

## Step 6: Setting the WF\_RESOURCES Environment Variable

If you are using the standalone version of Oracle Workflow and your Workflow server is installed on a UNIX platform, you must set an environment variable called `WF_RESOURCES` to point to the language-dependent Oracle Workflow resource file (`wf<language>.res`). The resource file generally resides in the `ORACLE_HOME/wf/res` directory.

**Important:** Do not enclose environment variable values in double quotes (" ") as this is not supported.

You do not need to set this environment variable if your Workflow server is installed on the Windows platform. The Workflow server installation on Windows

automatically sets a `WF_RESOURCES` environment variable that identifies the path of the `wf<language>.res` file.

You also do not need to set this environment variable if you are using the version of Oracle Workflow embedded in Oracle Applications. For Oracle Applications, the path of the language-dependent Oracle Workflow resource file is `$FND_TOP/$APPLRSC/wf<language>.res`.

## Step 7: Setting Up Background Workflow Engines

When the Workflow Engine initiates and performs a process, it completes all necessary activities before continuing to the next eligible activity. In some cases, an activity can require a large amount of processing resource or time to complete. Oracle Workflow lets you manage the load on the Workflow Engine by setting up supplemental engines to run these costly activities as background tasks. In these cases, the costly activity is *deferred* by the Workflow Engine and run later by a background engine. The main Workflow Engine can then continue to the next available activity, which may occur on some other parallel branch of the process. A workflow process can also include a Wait activity, which defers the continuation of a process until a later time. This type of deferred activity is also completed by a background engine.

A background engine must also be set up to handle timed out notification activities. When the Workflow Engine comes across a notification activity that requires a response, it calls the Notification System to send the notification to the appropriate performer, and then sets the notification activity to a status of 'NOTIFIED' until the performer completes the notification activity. Meanwhile, a background engine set up to handle timed out activities periodically checks for 'NOTIFIED' activities and whether these activities have time out values specified. If a 'NOTIFIED' activity does have a time out value, and the current date and time exceeds that time out value, the background engine marks that activity as timed out and calls the Workflow Engine. The Workflow Engine then resumes by trying to execute a `<Timeout>` transition activity.

Additionally, a background engine must be set up to handle stuck processes. A process is identified as stuck when it has a status of `ACTIVE`, but cannot progress any further. For example, a process could become stuck in the following situations:

- A thread within a process leads to an activity that is not defined as an End activity but has no other activity modeled after it, and no other activity is active.
- A process with only one thread loops back, but the pivot activity of the loop has the On Revisit property set to `Ignore`.
- An activity returns a result for which no eligible transition exists. For instance, if the function for a function activity returns an unexpected result value, and no default transition is modeled after that activity, the process cannot continue.

The background engine sets the status of a stuck process to `ERROR: #STUCK` and executes the error process defined for it.

The following table lists the standard queues used in background engine processing.



### **Background Engine Queues**

Queue Table	Queue Name	Payload Type	Retention Time	Description
WF_DEFERRED_QUEUE_M	WF_DEFERRED_QUEUE_M	SYSTEM. WF_PAYLOAD_T	0 days	Standard background deferred queue
WF_OUTBOUND_QUEUE	WF_OUTBOUND_QUEUE	SYSTEM. WF_PAYLOAD_T	0 days	Standard background outbound queue
WF_INBOUND_QUEUE	WF_INBOUND_QUEUE	SYSTEM. WF_PAYLOAD_T	0 days	Standard background inbound queue

**Note:** These queues are also used by the Java Function Activity Agent. See: Setting Up the Java Function Activity Agent, page 2-140 and Workflow Queue APIs, *Oracle Workflow API Reference*.

You can define and start up as many background engines as you like to check for deferred and timed out activities.

Background engines can be restricted to handle activities associated with specific item types, and within specific cost ranges. A background engine runs until it completes all eligible activities at the time it was initiated.

Generally, you should set the background engine up to run periodically by either using a script or database job to restart the background engine periodically (for the standalone version of Oracle Workflow), or scheduling the Background Process concurrent program to resubmit periodically (for the version of Oracle Workflow embedded in Oracle Applications).

Ensure that you have at least one background engine that can check for timed out activities, one that can process deferred activities, and one that can handle stuck processes. At a minimum, you need to set up one background engine that can handle both timed out and deferred activities as well as stuck processes. However, for performance reasons we recommend that you run three separate background engines at different intervals.

- Run a background engine to handle only deferred activities every 5 to 60 minutes.
- Run a background engine to handle only timed out activities every 1 to 24 hours as needed.
- Run a background engine to handle only stuck processes once a week to once a month, when the load on the system is low.

### **To Start a Background Engine:**

If you are using the standalone version of Oracle Workflow, then use the `WF_ENGINE.BACKGROUND()` API to start up a background engine. Sample scripts that repeatedly run the background engine are provided with the standalone version of Oracle Workflow. You can also use the procedures in the `DBMS_JOB` or `DBMS_SCHEDULER` packages to schedule and manage the background engine as a database job. See: Background, *Oracle Workflow API Reference* and Managing Job Queues, *Oracle Database Administrator's Guide* or Using the Scheduler, *Oracle Database Administrator's Guide*.

Additionally, in standalone Oracle Workflow, you can use the Oracle Workflow Manager component available through Oracle Enterprise Manager to submit and manage Workflow background engine database jobs. For more information, please refer to the Oracle Workflow Manager online help.

If you are using the version of Oracle Workflow embedded in Oracle Applications, you can start a background engine by submitting the Background Process concurrent program using the Submit Requests form. See: *To Schedule Background Engines*, page 2-52.

Additionally, in Oracle Applications, you can use the Oracle Workflow Manager component of Oracle Applications Manager to submit and manage the Workflow Background Process concurrent program. For more information, please refer to the Oracle Applications Manager online help.

**Note:** Make sure you have at least one background engine that can check for timed out activities, one that can process deferred activities, and one that can handle stuck processes. At a minimum, you need to set up one background engine that can handle both timed out and deferred activities as well as stuck processes.

### **To Schedule Background Engines:**

If you are using the version of Oracle Workflow embedded in Oracle Applications, you can submit the background engine procedure as a concurrent program to schedule different background engines to run at different times. Use the Submit Requests window in Oracle Applications to submit the Workflow Background Process. See: *Overview of Concurrent Programs and Requests, Oracle Applications System Administrator's Guide*.

**Note:** If you require a larger rollback segment for the Workflow Background Process than the default, you can use the Concurrent Programs window in the System Administrator responsibility to specify the rollback segment that you want. This rollback segment will be used instead of the default and will be used up until the first commit.

Query the Workflow Background Process concurrent program (FNDWFBG) in the Concurrent Programs window, and choose the Session Control button. Then in the Session Control window, enter the rollback segment you want in the Rollback Segment field, and save your work. See: *Concurrent Programs Window, Oracle Applications System Administrator's Guide*.

### **To Run a Workflow Background Process as a Concurrent Program**

1. Navigate to the Submit Requests form.
2. Submit the Workflow Background Process concurrent program as a request. See: *Running Reports and Programs, Oracle Applications User's Guide*.
3. In the Parameters window, enter values for the following parameters:

#### **Item Type**

Specify an item type to restrict this engine to activities associated with that item type. If you do not specify an item type, the engine processes any deferred activity regardless of its item type.

**Minimum Threshold**

Specify the minimum cost that an activity must have for this background engine to execute it, in hundredths of a second.

**Maximum Threshold**

Specify the maximum cost that an activity can have for this background engine to execute it, in hundredths of a second.

By using Minimum Threshold and Maximum Threshold you can create multiple background engines to handle very specific types of activities. The default values for these arguments are null so that the background engine runs activities regardless of cost.

**Process Deferred**

Specify whether this background engine checks for deferred activities. Setting this parameter to 'Yes' allows the engine to check for deferred activities.

**Process Timeout**

Specify whether this background engine checks for activities that have timed out. Setting this parameter to 'Yes' allows the engine to check for timed out activities.

**Process Stuck**

Specify whether this background engine checks for stuck processes. Setting this parameter to 'Yes' allows the engine to check for stuck processes.

**Note:** Make sure you have at least one background engine that can check for timed out activities, one that can process deferred activities, and one that can handle stuck processes.

4. Choose OK to close the Parameters window.
5. When you finish modifying the run options to define the schedule for the background engine, choose Submit to submit the request.

**To Set Engine Thresholds:**

To set the thresholds of background engines, specify the minimum threshold and maximum threshold arguments when starting the engine. The background engine then only processes activities with costs within your specifications.

The Workflow Engine threshold is set to 50 as a default. Activities with a cost higher than 50 are deferred for background engines to process.

In some cases, you may want to force the engine to defer an activity although the activity's cost is less than fifty. You can do this by altering the Workflow Engine threshold in the PL/SQL stored procedure for a function activity.

The engine threshold is set in an externalized constant called `THRESHOLD`. Include the following line in your PL/SQL procedure to set the Workflow Engine threshold to a different value:

```
WF_ENGINE.THRESHOLD := n;
```

You should reset the threshold value afterwards in SQL\*Plus or in the next function activity so that other activities are processed as expected.

## Related Topics

Activity Cost, *Oracle Workflow Developer's Guide*

Timeout Transitions, *Oracle Workflow Developer's Guide*

Deferring Activities, page B-5

Wait Activity, *Oracle Workflow Developer's Guide*

## Step 8: Implementing Notification Mailers

A notification mailer is a Java program that performs e-mail send and response processing for the Oracle Workflow Notification System, using the JavaMail API. You need to implement one or more notification mailers only if you want to have your workflow users receive their notifications by e-mail, as well as from the Worklist Web pages.

See: Reviewing Notifications via Electronic Mail, *Oracle Workflow User's Guide* and Defining Rules for Automatic Notification Processing, *Oracle Workflow User's Guide*.

### Managing Notification Mailers:

The notification mailer program is defined as a service component type in the Generic Service Component Framework. This framework helps to simplify and automate the management of background Java services. For more information about managing service components, please refer to the Oracle Applications Manager online help or the Oracle Enterprise Manager online help.

Oracle Workflow provides one seeded notification mailer service component, called Workflow Notification Mailer. Most of the configuration parameters for this mailer are set to default values. You can enter the remaining required parameters using the Oracle Workflow Configuration Assistant for the standalone version of Oracle Workflow. For Oracle Applications, you can enter several of the remaining required parameters using AutoConfig and then simply enter the e-mail inbox password after installation in order to complete the configuration of the Workflow Notification Mailer. If the mail servers and Business Event System components used by the notification mailers are set up, and the service component container to which the Workflow Notification Mailer belongs is started, the seeded notification mailer automatically starts running once its configuration is complete. Alternatively, if you only want to send outbound messages and do not need to receive inbound messages, you only need to set the inbound thread count to zero and enter placeholder values for the inbound configuration parameters after installation.

You cannot delete the seeded Workflow Notification Mailer or edit its name, assigned agents, correlation ID value, or container. However, if necessary you can optionally update other configuration parameters, schedule control events, or manually choose control commands to start, stop, suspend, resume, or refresh this notification mailer.

You can also optionally create additional notification mailer service components. For example, you can create a notification mailer that processes only messages that belong to a particular workflow item type. You can also configure any notification mailer service component to process only inbound messages, or only outbound messages.

You associate inbound and outbound mailers with each other by assigning them the same mailer node name. You can optionally assign the same node name to multiple outbound mailers, but you must not assign the same node name to more than one mailer that performs inbound processing.

- If you create an outbound-only mailer, but you still want to perform response processing for e-mail responses to the outbound messages it sends, you should create exactly one other mailer with the same node name that does perform inbound message processing. Otherwise, there will be no inbound mailer that can process incoming responses to outbound messages sent by this outbound mailer.
- If you only want to implement outbound message processing, without inbound e-mail response processing, then you can configure an outbound-only mailer without creating a corresponding inbound mailer. In this case you should configure the mailer to use message templates for response-required notifications that do not request a response by e-mail, but instead direct recipients to respond from the Notification Details Web page. For example, you can configure the mailer to send response-required notifications using the Workflow View From UI message template, which is an alternative template provided by Oracle Workflow in the System: Mailer item type, or create your own custom message templates. The outbound-only mailer can still use the standard message templates to send outbound summary notifications or For Your Information (FYI) notifications that do not require a response.
- If you create an inbound-only mailer, you should create at least one outbound mailer with the same node name. Otherwise, no inbound response messages will be marked with that node name and this inbound mailer will have no messages to process.

**Note:** The node name for each node must be unique. However, multiple outbound mailers and one inbound mailer can share the same node. The maximum length for a node name is eight characters, and the node name cannot include any spaces or any of the following characters: left bracket ([), right bracket (]), slash (/), or at sign (@).

Service components must be hosted by a service component container. If you create custom notification mailer service components, you can assign them to the seeded container for notification mailers.

- In Oracle Applications, a service component container is implemented as a Generic Service Management (GSM) service. The seeded container for notification mailers is named `Workflow Mailer Service`.
- In standalone Oracle Workflow, a service component container is implemented as a servlet within an OC4J instance. The seeded container for notification mailers is named `WFMLRSVC`, within an OC4J instance named `OC4J_Workflow_Component_Container`.

In Oracle Applications only, based on the volume to be handled by the seeded container, you can also choose to create your own custom containers as GSM services in Oracle Applications Manager. If you create a custom GSM service in OAM, you can copy the service parameters from the seeded Workflow Mailer Service to your new service in order to specify how to run the new service. For more information about notification mailer configuration options, please refer to the Oracle Applications Manager online help or the Oracle Enterprise Manager online help.

### Setting Up Notification Mailers:

Currently, Oracle Workflow supports the Simple Mail Transfer Protocol (SMTP) for outbound messages and the Internet Message Access Protocol (IMAP) for inbound messages. You must have an SMTP server set up in order to send Oracle Workflow notification e-mail messages, and an IMAP server set up if you want to receive

e-mail notification responses. Users can receive e-mail notifications using various e-mail clients, although notifications may be displayed differently in different clients, depending on the features each client supports.

**Note:** Oracle Workflow supports IMAP version 4 (IMAP4) compliant mail servers. Ensure that your mail server uses this IMAP version. For more information, see the *JavaMail API Design Specification*: <http://java.sun.com/products/javamail/JavaMail-1.2.pdf>

**Note:** If you have certain types of software installed, you may already have the necessary mail server functionality available. For example, products such as Oracle Email, Microsoft Exchange, or Lotus Notes include IMAP services. You can use a UNIX server as an SMTP server by configuring the Sendmail program.

Additionally, you can choose to use IMAP server software that is available for download from some sources. For example, the University of Washington offers the UW IMAP Server as a public service, and Carnegie Mellon University offers the Cyrus IMAP Server. You might choose this option if your enterprise uses UNIX Sendmail e-mail accounts, for instance. For more information, see: <http://www.washington.edu/imap/>, <http://asg.web.cmu.edu/cyrus/>, and <http://www.imap.org/>.

**Note:** Third party software products are mentioned as examples only. Oracle makes no recommendation or endorsement of these third party software products.

If you are using the version of Oracle Workflow embedded in Oracle Applications, you should use the Oracle Workflow Manager component of Oracle Applications Manager (OAM) to configure and run notification mailers. For more information, please refer to the Oracle Applications Manager online help.

If you are using the standalone version of Oracle Workflow, you should use the standalone Oracle Workflow Manager component available through Oracle Enterprise Manager to configure and run notification mailers. For more information, please refer to the Oracle Enterprise Manager online help.

To set up a notification mailer, you must perform the following steps.

#### **To Set Up a Notification Mailer**

1. Set up an SMTP mail server to send outbound messages.
2. Set up an IMAP4 compliant mail server if you want to receive inbound messages.
3. If you want to receive inbound messages, set up an e-mail account for the notification mailer on your IMAP mail server, and set up three folders within that account: one to use as an inbox, one to store processed messages, and one to store discarded messages. The default values for these folders in the notification mailer configuration wizard are `INBOX`, `PROCESS`, and `DISCARD`. To avoid having to change these configuration parameters, name the folders within your account with these default names. Use your e-mail client to create these folders. A notification mailer may not be able to access folders that were created using command line tools outside the e-mail client.

4. You can enter the following configuration parameters for the seeded Workflow Notification Mailer service component during installation.
  - In Oracle Applications, you can use AutoConfig to enter these parameters. For more information about running AutoConfig, see *OracleMetaLink* note 165195.1 and AutoConfig, *Oracle Applications AD Utilities Reference Guide*.
    - SMTP server
    - IMAP server (if you want to receive inbound messages)
    - Inbox username (if you want to receive inbound messages)
    - Reply to e-mail address (if you want to receive inbound messages)
    - HTML agent name (defaults to the value you enter for the Applications Servlet Agent parameter)
  - In the standalone version of Oracle Workflow, you can use the Oracle Workflow Configuration Assistant to enter these parameters. See the installation documentation for your release and platform.
    - SMTP server
    - IMAP server (if you want to receive inbound messages)
    - Inbox username (if you want to receive inbound messages)
    - Inbox password (if you want to receive inbound messages)
    - Reply to e-mail address (if you want to receive inbound messages)
    - Processed folder (if you want to receive inbound messages)
    - Discard folder (if you want to receive inbound messages)

**Note:** When you enter the SMTP Server and IMAP Server parameters, specify the actual host name for each server. Do not use `localhost` as the setting for these parameters. You can optionally specify the port number to use on each server. Note, however, that notification mailers do not support SSL (Secure Socket Layer) connections to these servers. If you do not specify a port number, the notification mailer uses port 143 on the IMAP server and port 25 on the SMTP server by default. Specify each server in the following format:

`<server_name>[:<port_number>]`
5. Ensure that the Business Event System status is set to `Enabled` in the global workflow preferences, and that the `JOB_QUEUE_PROCESSES` and `AQ_TM_PROCESSES` database initialization parameters, which are required for the Business Event System, are set to appropriate values. The Business Event System status is set to `Enabled` by default, and usually you do not need to change this status. If notification processing is not being completed, however, you should check this preference value.
6. **(Recommended)** In Oracle Applications, you can optionally set the WF: Workflow Mailer Framework Web Agent profile option to the host and port of the Web server that notification mailers should use to generate the content for Oracle Applications Framework regions that are embedded in notifications. If

this profile option is not set, notification mailers will use the same Web agent specified in the Application Framework Agent profile option. However, if necessary for load balancing purposes, you can optionally specify a different Web agent for notification mailers to use. The WF: Workflow Mailer Framework Web Agent profile option should be set at site level. See: Overview of Setting User Profiles, *Oracle Applications System Administrator's Guide*.

7. Before a service component can run, the container which manages it must first be started. The seeded Workflow Notification Mailer service component belongs to a container named `Workflow Mailer Service` in Oracle Applications or `WFMLRSVC` in standalone Oracle Workflow. The seeded agent listener service components that are also required for notification mailer processing belong to a container named `Workflow Agent Listener Service` in Oracle Applications or `WFALSNRSVC` in standalone Oracle Workflow. You should ensure that these two containers are running, using Oracle Applications Manager for the version of Oracle Workflow embedded in Oracle Applications, or Oracle Enterprise Manager for the standalone version of Oracle Workflow. If you create your own custom containers in OAM for custom service components, ensure that those containers are running as well.

**Note:** In Oracle Applications, you can run a diagnostic test to verify the GSM services for Oracle Workflow. See: Oracle Workflow Diagnostic Tests, page D-1.

8. When the Workflow Agent Listener Service or `WFALSNRSVC` container is running, it automatically starts seeded agent listener service components named Workflow Deferred Notification Agent Listener, Workflow Error Agent Listener, and Workflow Inbound Notifications Agent Listener, which are required for notification mailer processing. Ensure that these agent listeners are running.
9. Use the notification mailer configuration wizard to configure your notification mailer service component. If you entered configuration parameters for the seeded Workflow Notification Mailer in the Oracle Workflow Configuration Assistant for standalone Oracle Workflow, you can skip this step. If you entered configuration parameters for the seeded Workflow Notification Mailer in AutoConfig for Oracle Applications, you only need to enter the password for the e-mail inbox in order to complete the configuration for that mailer and begin running it.

If you did not enter parameters for the seeded mailer during installation, then in order to complete the configuration for that mailer you need to enter only the SMTP server, IMAP server, e-mail inbox username, e-mail inbox password, processed folder, discard folder, reply to e-mail address, and for Oracle Applications only, the HTML agent name. All other configuration parameters for the seeded Workflow Notification Mailer are initially set to default values and do not need to be changed, although you can optionally do so if you choose.

**Note:** The IMAP server, e-mail inbox username, e-mail inbox password, and reply to e-mail address are required only if you want to receive inbound messages. Alternatively, if you only want to send outbound messages and do not need to receive inbound messages, you only need to set the inbound thread count to 0 after installation and enter placeholder values for



the inbound configuration parameters in order to complete the configuration of the Workflow Notification Mailer.

10. **(Optional)** By default, the seeded Workflow Notification Mailer has a Launch Summary Notifications event scheduled to send summary notifications once a day. You can optionally use the notification mailer configuration wizard to modify the start time and interval for this event's schedule, or to schedule the Launch Summary Notifications event at the interval you choose for any notification mailer service component. When this event is processed, a summary notification is sent to each role with a notification preference of SUMMARY or SUMHTML, listing all the notifications that are currently open for that role.
11. **(Optional)** In Oracle Applications, you can optionally use the WF: Mailer Cancellation Email profile option to determine whether notification mailers send cancellation messages when previously sent notifications are canceled. Set this profile option to Enabled if you want to send cancellation messages, or to Disabled if you do not want to send cancellation messages. The WF: Mailer Cancellation Email profile option must be set at site level. The default value is Enabled. See: *Overview of Setting User Profiles, Oracle Applications System Administrator's Guide*.
12. **(Optional)** By default, notification mailers require a response format for plain text notifications called the templated response method. If you want to use the direct response method instead, you can run a script named `afsvcpup.sql` to set the internal mailer parameter named `DIRECT_RESPONSE` to Y.
  - With the templated response method, a notification mailer sends plain text notifications requiring a templated response to users with a notification preference of MAILTEXT or MAILATTH. Users must reply using a template of response prompts and enter their response values between the quotes following each prompt.
  - With the direct response method, a notification mailer sends plain text notifications requiring a direct response to users with a notification preference of MAILTEXT or MAILATTH. Users must enter their response values directly as the first lines of a reply.

**Note:** Responses that are generated automatically from an HTML-formatted notification or attachment must always use a response template, regardless of which response method you select.

By default, the `DIRECT_RESPONSE` parameter is set to N, for the templated response method. To change this setting, run the `afsvcpup.sql` script located in the `$FND_TOP/sql` directory for Oracle Applications or the `ORACLE_HOME/wf/admin` directory for standalone Oracle Workflow. Use the script as follows:

```
sqlplus <user/pwd> @afsvcpup
```

At the prompts, enter the component ID for your notification mailer service component, the parameter ID for the `DIRECT_RESPONSE` parameter, and the value Y. You can find the IDs to enter in the lists displayed by the script, which show first the service components defined in your installation of Oracle Workflow and then the parameters defined for the specified service

component. You can also find the component ID for a notification mailer in the Define page of the configuration wizard.

13. **(Optional)** By default, notification mailers use the standard Workflow Open Mail (More Information Request) message in the System: Mailer item type as the template for requests for more information about a notification from one user to another user. However, if you use an e-mail application such as Microsoft Outlook Express that cannot process the response link included in that template, you can set an internal mailer parameter named `OPEN_MORE_INFO` to use the alternative template named Workflow Open Mail (More Information Request for Outlook Express) instead. In particular, if you set the Open Notification parameter in the notification mailer configuration wizard to use the Workflow Open Mail for Outlook Express message, then you should also set the `OPEN_MORE_INFO` parameter to use the Workflow Open Mail (More Information Request for Outlook Express) message. See: Workflow Open Mail (More Information Request for Outlook Express) Message, page 2-126.

By default, the `OPEN_MORE_INFO` parameter is set to the value `WFMAIL:OPEN_MORE_INFO`, which is the internal name for the Workflow Open Mail (More Information Request) message in the System: Mailer item type. To change this setting, run the `afsvcpup.sql` script located in the `$FND_TOP/sql` directory for Oracle Applications or the `ORACLE_HOME/wf/admin` directory for standalone Oracle Workflow. Use the script as follows:

```
sqlplus <user/pwd> @afsvcpup
```

At the prompts, enter the component ID for your notification mailer service component, the parameter ID for the `OPEN_MORE_INFO` parameter, and the value `WFMAIL:OPEN_MORE_INFO_OUTLOOK`, which is the internal name for the Workflow Open Mail (More Information Request for Outlook Express) message. You can find the IDs to enter in the lists displayed by the script, which show first the service components defined in your installation of Oracle Workflow and then the parameters defined for the specified service component. You can also find the component ID for a notification mailer in the Define page of the configuration wizard.

14. **(Optional)** The seeded Workflow Notification Mailer uses the Automatic startup mode by default and will be started automatically when you complete its configuration. If you select the Manual startup mode for a notification mailer service component, use the Service Components page in Oracle Workflow Manager to start that notification mailer. You can also use this page to manage any notification mailer service component.

### Outbound Notification Mailer Processing:

When the Workflow Engine determines that a notification message must be sent, it raises an event in the Business Event System called `oracle.apps.wf.notification.send`. Oracle Workflow provides a seeded subscription to this event, which is defined to be deferred immediately so that the workflow process that owns the notification can continue. The event is placed on the standard `WF_DEFERRED` agent. Oracle Workflow provides a seeded agent listener named Workflow Deferred Notification Agent Listener that runs on this agent to continue notification processing. This agent listener is dedicated solely to processing deferred notification events.

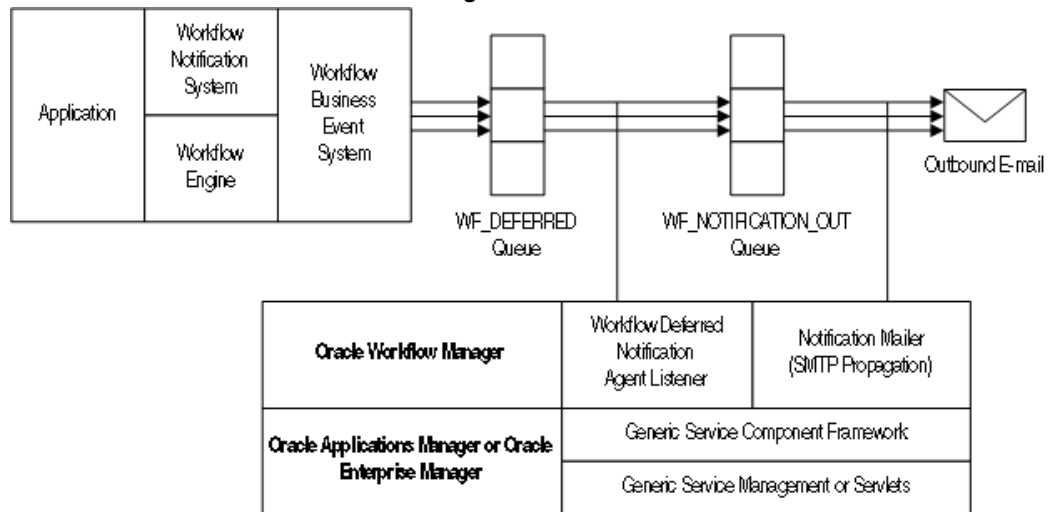
When the event is dequeued from WF\_DEFERRED and the subscription is processed, the subscription requires the event data for the event, causing the generate function for the event to be executed. The generate function for this event performs the following actions:

- Resolves the notification recipient role to a single e-mail address, which itself can be a mail list.
- Checks the notification preference of the recipient to determine whether an e-mail notification is required, and in what type of format.
- Switches its database session to the recipient role's preferred language and territory as defined in the directory service.
- Generates an XML representation of the notification message and any optional attachments using the appropriate message template.

Finally, the subscription places the event message on the standard WF\_NOTIFICATION\_OUT agent.

A notification mailer service component polls the WF\_NOTIFICATION\_OUT agent for messages that must be sent by e-mail. When the notification mailer dequeues a message from this agent, it uses a Java-based notification formatter to convert the XML representation of the notification into a MIME (Multi-purpose Internet Mail Extensions) encoded message and sends the message by the Simple Mail Transfer Protocol (SMTP).

#### Outbound Notification Mailer Processing



The e-mail notifications are based on message templates defined in Oracle Workflow Builder. Oracle Workflow provides a set of standard templates in the System: Mailer item type, which are used by default. It is not recommended to modify the standard templates. However, you can customize the message templates used to send your e-mail notifications by creating your own custom message templates in the System: Mailer item type using the Workflow Builder, and assigning these templates to a particular notification mailer service component in the mailer configuration parameters. The templates assigned to a mailer override the default System: Mailer templates. See: *Modifying Your Message Templates*, page 2-80.

Additionally, you can create your own custom message templates in a custom item type using the Workflow Builder, and assign these templates to a particular notification in

a workflow process by defining special message attributes. In this case the templates assigned to the notification override both the templates assigned to a mailer and the default System: Mailer templates. See: *Modifying Your Message Templates*, page 2-80 and *Notification Mailer Message Template Attributes*, *Oracle Workflow Developer's Guide*.

If the notification mailer cannot deliver an e-mail notification because the recipient's e-mail address is invalid, it performs the following actions:

- Sets the mail status of the notification to `FAILED`. This mail status indicates that an exception prevented this e-mail notification from being delivered but does not prevent the mailer from processing other notifications.
- Adds the e-mail address to its invalid e-mail address list. To avoid unnecessary processing, each notification mailer stores a list of e-mail addresses to which it could not deliver messages, and does not attempt to send any further messages to those addresses. Instead, for any subsequent notifications to the listed addresses, the notification mailer simply sets the mail status directly to `FAILED`.

**Note:** Each notification mailer can store up to 100 e-mail addresses in its invalid e-mail address list. If the notification mailer encounters additional invalid addresses when the list is already full, the notification mailer removes the oldest addresses from the list and adds the new addresses in their place. Also, the notification mailer clears the list by removing all addresses whenever you stop and restart the mailer.

- Changes the notification preference of the recipient to `DISABLED`. To further help avoid unnecessary processing, if a recipient has a notification preference of `DISABLED`, Oracle Workflow does not generate a complete XML representation of any notifications to that recipient, and a notification mailer does not attempt to send e-mail notifications to that recipient. Instead, the notification mailer simply sets the mail status of the notifications directly to `FAILED`. The change in notification preference also indicates to the user that e-mail notifications cannot be delivered. The user must correct the invalid e-mail address and then reset the notification preference in order to receive e-mail notifications.

In Oracle Applications, after correcting invalid e-mail addresses and resetting `DISABLED` notification preferences, you can run the Resend Failed Workflow Notifications concurrent program to retry open notifications that previously could not be sent. See: *Handling Mailer Errors*, page 2-77.

### **Inbound Notification Mailer Processing:**

Notification mailers can also process e-mail responses from users, using the Internet Message Access Protocol (IMAP). A notification mailer uses a Java-based e-mail parser to interpret the text of each message and create an XML representation of it.

A notification mailer uses three folders in your response mail account for response processing: one to receive incoming messages, one to store processed messages, and one to store discarded messages.

A notification mailer does the following to process response messages:

- Logs into its IMAP e-mail account.

- Checks the inbox folder for messages. If a message exists, the notification mailer reads the message, checking for the notification ID (NID) and node identifier in the NID line.
- If the message is not a notification response, meaning it does not contain an NID line, the notification mailer moves the message to the discard folder and treats it as an unsolicited message. For the first unsolicited message from a particular e-mail address, the notification mailer also sends a warning message back to the sender of the message.

However, to avoid sending unnecessary warnings due to bounced or auto-reply messages, each mailer node stores a list of e-mail addresses from which it has received unsolicited mail, and does not send any further warning messages to those addresses. Instead, if the node receives a second unsolicited message from a particular address, the notification mailer discards the message and raises the `oracle.apps.wf.mailer.unsolicited` event. You can optionally define a subscription to this event if you want to perform some other action in response to the second unsolicited message. For all subsequent unsolicited messages, the notification mailer simply discards the message.

**Note:** Each mailer node can store up to 100 e-mail addresses in its warned list. If the node receives unsolicited messages from additional addresses when the list is already full, the notification mailer removes the oldest addresses from the list and adds the new addresses in their place. Also, the notification mailer clears the list by removing all addresses when you start the mailer for the first time, and again whenever you stop and restart its container. In these cases, the mailer may send another warning message if it receives further unsolicited e-mail from an address that is no longer on the warned list.

- If the message is a notification response, but for the wrong node, the notification mailer leaves the message in the inbox.
- If the message is a notification response for the current node, meaning it contains an NID line including the node identifier of the current node, the notification mailer processes the message.

The notification mailer performs the following steps for messages that belong to its node.

- Retrieves the notification ID.
- Checks to see if the message bounced by referring to the tags specified in the configuration parameters, if any. If the message bounced, the notification mailer reroutes it or updates the notification's status and stops any further processing, depending on the specifications of the tag list.
- Checks the Oracle Workflow database for this notification based on the NID line.
  - If the notification does not exist, meaning the notification ID or the access key in the NID line is invalid, the notification mailer moves the message to the discard folder. If the NID line is incorrectly formatted, the notification mailer moves the message to the discard folder and treats it as an unsolicited message.
  - If the notification exists, but is closed or canceled, the notification mailer moves the message to the discard folder and sends a Workflow Closed Mail or Workflow Canceled Mail message to the recipient role, respectively.

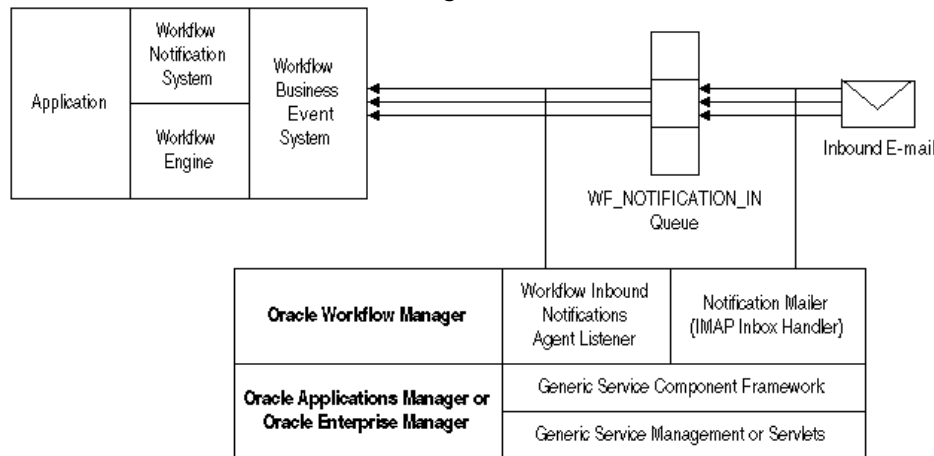
- If the notification exists and is open, the notification mailer generates an XML representation of the message and places it on the standard WF\_NOTIFICATION\_IN agent as an event called `oracle.apps.wf.notification.receive.message`. The notification mailer then moves the e-mail message to the processed folder.

**Note:** If the character encoding of the response message is not compatible with the database codeset, the notification mailer may not be able to parse the response and recognize the response values. Ensure that the character encoding of messages in your mail client is compatible with the codeset of your database.

Finally, if there are no more unprocessed messages in the inbox, the notification mailer logs out of the e-mail account.

Oracle Workflow provides a seeded agent listener named Workflow Inbound Notifications Agent Listener that runs on the WF\_NOTIFICATION\_IN agent to continue notification processing for the valid response messages placed on that agent. When an event message is dequeued from WF\_NOTIFICATION\_IN, Oracle Workflow executes a seeded subscription that calls the appropriate notification response function. This function verifies the response values with the definition of the notification message's response attributes in the database. If a response value is invalid, or if no response value is included, the notification response function causes the notification mailer to send a Workflow Invalid Mail message to the recipient role. If the responses are valid, the notification response function records the response and completes the notification.

#### ***Inbound Notification Mailer Processing***



See: Workflow Warning Mail Message, page 2-116, Workflow Closed Mail Message, page 2-112, Workflow Canceled Mail Message, page 2-104, Workflow Invalid Mail Message, page 2-106, and Workflow Invalid Open Mail (More Information Request) Message, page 2-129.

#### **Wireless Notifications:**

If you are using the standalone version of Oracle Workflow available with Oracle Application Server, then you can also send wireless notifications using Oracle Application Server Wireless. Oracle Application Server Wireless integrates with Oracle Workflow by providing a subscriber to the WF\_NOTIFICATION\_OUT queue. This

subscriber dequeues notification messages from the queue as JMS Text messages and can then send them to wireless devices. If a user sends a response from a wireless device, Oracle Application Server Wireless calls the appropriate notification response function to record the response and complete the notification. For more information, please refer to the *Oracle Application Server Wireless Administrator's Guide* and the *Oracle Application Server Wireless Developer's Guide*.

**Note:** You can run Oracle Workflow notification mailers concurrently with Oracle Application Server Wireless if you want to send both e-mail notifications and wireless notifications. Both components can access the same notification messages on the WF\_NOTIFICATION\_OUT queue.

### Full MIME Support:

Oracle Workflow fully supports MIME (Multi-purpose Internet Mail Extensions) encoded messages. This means that notification mailers can exchange messages with workflow users containing languages with different character sets and multi-media encoded content.

### Notification Preferences:

Oracle Workflow lets users determine how they view notifications by setting a notification preference. As a workflow administrator, you can set the default notification preference for all users in your enterprise using the Global Preferences page in standalone Oracle Workflow or the Workflow Configuration page in Oracle Applications. Users can override the default by modifying their individual notification preference setting in the User Preferences Web page for standalone Oracle Workflow or the Preferences page in Oracle Applications. See: Setting Global User Preferences, page 2-11, Setting User Preferences, *Oracle Workflow User's Guide*, and Set Preferences, *Oracle Applications User's Guide*.

Often, the functionality of a user's mail reader determines what the user's notification preference should be. Some mail readers can only display plain text, others can display HTML formatting, while still others can only display HTML formatting in an attachment. The following notification preferences are available:

- Plain text mail (MAILTEXT) - The notification message appears as plain text, with no attachments. See: Plain Text E-mail, page 2-66.
- HTML mail with attachments (MAILHTML) - The notification message appears as HTML-formatted text, with at least one standard attachment that is a link to the notification in the Notification Details Web page. If the notification message has 'Content-Attached' message attributes, these attributes appear as additional custom attachments to the message. See: HTML-Formatted E-mail with Attachments, page 2-67.
- HTML mail (MAILHTM2) - The notification message appears as HTML-formatted text, but does not include any standard attachments. If the notification message has 'Content-Attached' message attributes, however, these attributes appear as custom attachments to the message. See: HTML-Formatted E-mail, page 2-69.

**Important:** If users wish to view notifications with HTML formatting, but their mail reader is not able to interpret HTML formatting in the mail message body, they can change their notification preference to 'Plain text mail with HTML attachments' (MAILATTH). The MAILATTH preference delivers an

HTML-formatted version of the notification as an attachment to the plain text notification.

- Plain text mail with HTML attachments (`MAILATTH`) - The notification message appears as plain text, with at least two standard attachments. One attachment is an HTML-formatted version of the message, and the other is a link to the notification in the Notification Details Web page. If the notification message has 'Content-Attached' message attributes, these attributes appear as additional custom attachments to the message. See: Plain Text E-mail with an HTML Attachment, page 2-71.
- Plain text summary mail (`SUMMARY`) - The message is a plain text summary of all open notifications. To respond to the individual notifications in the summary, the user must access the notifications from the Worklist Web page.
- HTML summary mail (`SUMHTML`) - The message is an HTML-formatted summary of all open notifications, with a link to the Worklist Web page as well as links to each notification in the Notification Details Web page. To respond to the individual notifications in the summary, the user must access the notifications from the Web pages. This notification preference is currently available only in the version of Oracle Workflow embedded in Oracle Applications.
- Do not send me mail (`QUERY`) - The notification mailers do not send the user e-mail notifications. Instead the user must query and respond to notifications from the Worklist Web page.
- Disabled (`DISABLED`) - Oracle Workflow sets this preference for a user if a notification mailer attempted to send e-mail to the user, but the e-mail address on record for the user was invalid. Notification mailers do not send any further e-mail notifications to a user with the `DISABLED` notification preference. The user must correct his or her e-mail address in the Oracle Workflow directory service and then reset the notification preference in order to receive e-mail notifications. In Oracle Applications, after the user's e-mail address and notification preference are corrected, you can run the Resend Failed Workflow Notifications concurrent program to retry open notifications that could not be sent to the user previously. See: Handling Mailer Errors, page 2-77.

**Important:** Users can always query and respond to their notifications from the Worklist Web page, even if they set their notification preference to receive e-mail or their notification preference is set to `DISABLED`.

In Oracle Applications, you can run a diagnostic test to check that all users with a notification preference to receive e-mail have an e-mail address defined. See: Oracle Workflow Diagnostic Tests, page D-1.

See: Reviewing Notifications via Electronic Mail, *Oracle Workflow User's Guide*, Viewing Notifications from a Web Browser, *Oracle Workflow User's Guide*, and Reviewing a Summary of Your Notifications via Electronic Mail, *Oracle Workflow User's Guide*.

### **Plain Text E-mail**

If the performer of a notification has a notification preference of plain text mail (`MAILTEXT`), when a notification mailer processes the notification, it generates a plain text e-mail message and sends it to the performer role. The notification mailer uses the Text Body defined for the message in the Oracle Workflow Builder message property page to generate the plain text e-mail. It token replaces all attribute values referenced in the message body with plain text values. For example:



- PL/SQL and PL/SQL CLOB document attributes are token replaced with a plain text version of a PL/SQL document.
- URL attributes are token replaced with the display name of the URL attribute, followed by a colon and the URL:

`<URL_Attribute_Display_Name>:<URL>`

- In Oracle Applications, a document attribute that represents an Oracle Applications Framework region is token replaced with a plain text version of the region. Note that non-text content such as images, links, or special HTML formatting do not appear in the text version of the region. A notification with an embedded Oracle Applications Framework region can contain multiple regions. However, it cannot contain any tokens for content other than regions.

**Important:** Message attributes that have Attach Content checked in their Attributes property page, are attached as plain text to their parent notification. Note that this may render some attachments unreadable if the attachment includes special formatting or your plain text e-mail reader does not recognize attachments. To view these attachments, you should display your notifications in the Worklist Web page. See: Viewing Notifications from a Web Browser, *Oracle Workflow User's Guide*.

A recipient of a plain text e-mail notification responds by manually replying to the notification and entering response values following the instructions provided in the notification. See: To Respond to a Plain Text E-mail Notification Using Templated Response, *Oracle Workflow User's Guide* and To Respond to a Plain Text E-mail Notification Using Direct Response, *Oracle Workflow User's Guide*.

### HTML-Formatted E-mail with Attachments

If the performer of a notification has a notification preference of HTML mail with attachments (MAILHTML), when a notification mailer processes the notification, it generates an HTML-formatted e-mail notification and sends it to the performer role. The recipient should use an e-mail reader that can interpret and display HTML content within a message body.

**Note:** If your e-mail reader cannot interpret HTML formatting in a message body, you should set your notification preference to plain text mail with HTML Attachments (MAILATTH).

The notification mailer uses the HTML Body defined for the message in the Message Body property page to generate the HTML e-mail message. If no HTML Body is defined, it uses the Text Body to generate the HTML message. The notification mailer token replaces all message attributes referenced in the message body with HTML-formatted values. For example:

- PL/SQL and PL/SQL CLOB document attributes are token replaced with HTML text or plain text between `<pre>...</pre>` HTML tags.
- URL attributes are token replaced with HTML links, unless the URL points to an image file. When you select such a link, your e-mail reader takes you to the target URL page.

- URL attributes that point to an image file are token replaced with `<IMG>...</IMG>` HTML tags to display the image inline within the message body. Notification mailers treat URL attributes as images if the URL points to a file with an extension of `gif`, `jpg`, `png`, `tif`, `bmp`, or `jpeg`.
- In Oracle Applications, a document attribute that represents an Oracle Applications Framework region is token replaced with the HTML version of the region. A notification with an embedded Oracle Applications Framework region can contain multiple regions. However, it cannot contain any tokens for content other than regions.

**Note:** For notifications that do not include embedded Oracle Applications Framework regions, message attributes that have Attach Content checked in their Attributes property page, are appended as attachments to their parent message. For example:

- If the message attribute is a URL attribute, an attachment called Notification References is appended to the message. This attachment includes a link to each URL attribute for the message that has Attach Content checked. You can navigate to a URL by choosing its link. Note that the Notification References attachment does not display images inline. If Attach Content is checked, a URL attribute always appears as a link in the Notification References attachment, even if the URL points to an image file. Notification mailers also do not have any special handling of video or audio URL content.
- If the message attribute is a PL/SQL, PL/SQL CLOB, or PL/SQL BLOB document attribute, the fully generated PL/SQL document is fetched and attached to the message.

However, if a notification includes an embedded Oracle Applications Framework region, then Oracle Workflow includes the Related Applications region in the e-mail message with links to the attached URLs or PL/SQL documents, instead of appending them as separate attachments.

You can respond to your HTML-formatted notification by clicking on a link that represents the response in the HTML message body. The response link generates a plain text e-mail response that includes a response template modified with the predefined response value that you select. See: *To Respond to an HTML E-mail Notification, Oracle Workflow User's Guide*.

If your notification preference is `MAILHTML`, each HTML-formatted notification always includes at least one standard attachment. The attachment is called Notification Detail Link. When you select this attachment, your e-mail reader opens a browser window that displays your notification in the Notification Details Web page. You can alternatively respond directly to your notification from this Web page, bypassing the need to process your response through a notification mailer.

**Note:** Depending on your configuration, if you are not already logged in, you may be prompted to log in when you select the Notification Detail Link before you can access the Notification Details page. See: *Responses through the Notification Detail Link Attachment*, page 2-74.

**Note:** You can use the Inline Attachment configuration parameter to set the Content-Disposition MIME header to either `inline` or `attachment` for all attachments to notification messages, including the Notification Detail Link, Notification References containing attached URLs, and attached PL/SQL, PL/SQL CLOB, or PL/SQL BLOB documents. Note, however, that some e-mail clients may not support the Content-Disposition header, or may support it in varying ways. Consequently, the Inline Attachment setting may not always have the desired effect, depending on the e-mail clients with which users read their e-mail messages.

**Note:** The file name of the Notification Detail Link attachment is determined by the text value for the `WF_URL_NOTIFICATION` resource token, or by the token name if no text value is defined. Similarly, the file name of the Notification References attachment is determined by the text value for the `WF_URLLIST_ATTACHMENT` resource token, or by the token name if no text value is defined. The default file names are "Notification Detail Link.html" and "Notification References.html", respectively. If you want to specify different file names for these attachments, you must first create a `.msg` source file specifying the new file names as the text values for the `WF_URL_NOTIFICATION` and `WF_URLLIST_ATTACHMENT` resource tokens. Then use the Workflow Resource Generator program to upload the new seed data from the source file to the database table `WF_RESOURCES`. See: To Run the Workflow Resource Generator, *Oracle Workflow API Reference* and Setting the `WF_RESOURCES` Environment Variable, page 2-49.

### HTML-Formatted E-mail

If the performer of a notification has a notification preference of HTML mail (`MAILHTM2`), without standard attachments, when a notification mailer processes the notification, it generates an HTML-formatted e-mail notification and sends it to the performer role. The recipient should use an e-mail reader that can interpret and display HTML content within a message body.

**Note:** If your e-mail reader cannot interpret HTML formatting in a message body, you should set your notification preference to plain text mail with HTML Attachments (`MAILATTH`).

The notification mailer uses the HTML Body defined for the message in the Message Body property page to generate the HTML e-mail message. If no HTML Body is defined, it uses the Text Body to generate the HTML message. The notification mailer token replaces all message attributes referenced in the message body with HTML-formatted values. For example:

- PL/SQL and PL/SQL CLOB document attributes are token replaced with HTML text or plain text between `<pre>...</pre>` HTML tags.
- URL attributes are token replaced with HTML links, unless the URL points to an image file. When you select such a link, your e-mail reader takes you to the target URL page.

- URL attributes that point to an image file are token replaced with `<IMG>...</IMG>` HTML tags to display the image inline within the message body. Notification mailers treat URL attributes as images if the URL points to a file with an extension of `gif`, `jpg`, `png`, `tif`, `bmp`, or `jpeg`.
- In Oracle Applications, a document attribute that represents an Oracle Applications Framework region is token replaced with the HTML version of the region. A notification with an embedded Oracle Applications Framework region can contain multiple regions. However, it cannot contain any tokens for content other than regions.

**Note:** For notifications that do not include embedded Oracle Applications Framework regions, message attributes that have Attach Content checked in their Attributes property page, are usually appended as attachments to their parent message. For example:

- If the message attribute is a URL attribute, an attachment called Notification References is appended to the message. This attachment includes a link to each URL attribute for the message that has Attach Content checked. You can navigate to a URL by choosing its link. Note that the Notification References attachment does not display images inline. If Attach Content is checked, a URL attribute always appears as a link in the Notification References attachment, even if the URL points to an image file. Notification mailers also do not have any special handling of video or audio URL content.
- If the message attribute is a PL/SQL, PL/SQL CLOB, or PL/SQL BLOB document attribute, the fully generated PL/SQL document is fetched and attached to the message.

However, if a notification includes an embedded Oracle Applications Framework region, then Oracle Workflow includes the Related Applications region in the e-mail message with links to the attached URLs or PL/SQL documents, instead of appending them as separate attachments.

Note that although such message-specific attachments may be included, no standard attachments are included with the notification message if your notification preference is `MAILHTML2`.

You can respond to your HTML-formatted notification by clicking on a link that represents the response in the HTML message body. The response link generates a plain text e-mail response that includes a response template modified with the predefined response value that you select. See: *To Respond to an HTML E-mail Notification*, *Oracle Workflow User's Guide*.

**Note:** You can use the Inline Attachment configuration parameter to set the Content-Disposition MIME header to either `inline` or `attachment` for all attachments to notification messages, including Notification References containing attached URLs and attached PL/SQL, PL/SQL CLOB, or PL/SQL BLOB documents. Note, however, that some e-mail clients may not support the Content-Disposition header, or may support it in varying ways. Consequently, the Inline Attachment setting may not

always have the desired effect, depending on the e-mail clients with which users read their e-mail messages.

**Note:** The file name of the Notification References attachment is determined by the text value for the WF\_URLLIST\_ATTACHMENT resource token, or by the token name if no text value is defined. The default file name is "Notification References.html". If you want to specify a different file name for this attachment, you must first create a .msg source file specifying the new file name as the text value for the WF\_URLLIST\_ATTACHMENT resource token. Then use the Workflow Resource Generator program to upload the new seed data from the source file to the database table WF\_RESOURCES. See: To Run the Workflow Resource Generator, *Oracle Workflow API Reference* and Setting the WF\_RESOURCES Environment Variable, page 2-49.

### Plain Text E-mail with an HTML Attachment

If the performer of a notification has a notification preference of plain text mail with HTML attachments (MAILATTH), when a notification mailer processes the notification, it generates a plain text e-mail notification with HTML attachments and sends it to the performer role. The recipient should use an e-mail reader that supports HTML attachments.

The notification mailer uses the Text Body defined for the message in the Message Body property page to generate the plain text body of the e-mail. It also generates an HTML version of the notification message and sends it as an attachment called HTML Message Body to the plain text e-mail. The notification mailer generates the content of the HTML attachment from the HTML Body defined for the message. If no HTML Body is defined, it uses the Text Body to generate the HTML mail. The notification mailer token replaces all message attributes referenced in the plain text message body with plain text values and token replaces all message attributes referenced in the attached HTML message with HTML-formatted values. See: Plain Text E-mail, page 2-66 and HTML-Formatted E-mail, page 2-69.

If your e-mail reader supports HTML formatting in the message body, you can optionally select the Inline Attachment configuration parameter to set the Content-Disposition MIME header to `inline` for attachments. Then the HTML attachment will also appear inline in the message body. Note, however, that some e-mail clients may not support the Content-Disposition header, or may support it in varying ways. Consequently, the Inline Attachment setting may not always have the desired effect, depending on the e-mail clients with which you read your e-mail messages.

**Note:** For notifications that do not include Oracle Applications Framework regions, message attributes that have Attach Content checked in their Attributes property page, are usually appended as attachments. For example:

- If the message attribute is a URL attribute, an attachment called Notification References is appended to the message. This attachment includes a link to each URL attribute for the message that has Attach Content checked. You can navigate to a URL by choosing its link.

- If the message attribute is a PL/SQL, PL/SQL CLOB, or PL/SQL BLOB document attribute, the fully generated PL/SQL document is fetched and attached to the message.

However, if a notification includes an embedded Oracle Applications Framework region, then Oracle Workflow includes the Related Applications region in the e-mail message with links to the attached URLs or PL/SQL documents, instead of appending them as separate attachments.

The notifications received by a user whose notification preference is 'Plain text with HTML attachments' always contain at least two standard attachments. The first attachment is HTML Message Body and the other is Notification Detail Link. When you select Notification Detail Link, your e-mail reader opens a browser window that displays your notification in the Notification Details Web page. You can respond directly to your notification from this Web page, bypassing the need to process your response through a notification mailer. See: To Respond to a Plain Text E-mail Notification with an HTML Attachment, *Oracle Workflow User's Guide*.

**Note:** Depending on your configuration, if you are not already logged in, you may be prompted to log in when you select the Notification Detail Link before you can access the Notification Details page. See: Responses through the Notification Detail Link Attachment, page 2-74.

Alternatively, a recipient of this type of notification can respond in one of two other ways:

- Manually reply to the notification and enter response values following the instructions provided in the notification. See: To Respond to a Plain Text E-mail Notification Using Templated Response, *Oracle Workflow User's Guide* and To Respond to a Plain Text E-mail Notification Using Direct Response, *Oracle Workflow User's Guide*.
- Select the HTML Message Body attachment to display the HTML-formatted version of the e-mail message, and click on the HTML link that represents the response. The response link generates a plain text e-mail response that includes a response template updated with the predefined response value you select.

**Note:** You can use the Inline Attachment configuration parameter to set the Content-Disposition MIME header to either `inline` or `attachment` for all attachments to notification messages, including the Notification Detail Link, HTML Message Body, Notification References containing attached URLs, and attached PL/SQL, PL/SQL CLOB, or PL/SQL BLOB documents. Note, however, that some e-mail clients may not support the Content-Disposition header, or may support it in varying ways. Consequently, the Inline Attachment setting may not always have the desired effect, depending on the e-mail clients with which users read their e-mail messages.

**Note:** The file name of the HTML Message Body attachment is determined by the text value for the `WF_HTML_MESSAGE` resource token, or by the token name if no text value is

defined. Similarly, the file name of the Notification Detail Link attachment is determined by the text value for the WF\_URL\_NOTIFICATION resource token, or by the token name if no text value is defined; and the file name of the Notification References attachment is determined by the text value for the WF\_URLLIST\_ATTACHMENT resource token, or by the token name if no text value is defined. The default file names are "HTML Message Body.html", "Notification Detail Link.html", and "Notification References.html", respectively. If you want to specify different file names for these attachments, you must first create a .msg source file specifying the new file names as the text values for the WF\_HTML\_MESSAGE, WF\_URL\_NOTIFICATION, and WF\_URLLIST\_ATTACHMENT resource tokens. Then use the Workflow Resource Generator program to upload the new seed data from the source file to the database table WF\_RESOURCES. See: To Run the Workflow Resource Generator, *Oracle Workflow API Reference* and Setting the WF\_RESOURCES Environment Variable, page 2-49.

### E-mail Notification Security:

Each individual e-mail notification message sent by a notification mailer includes a line containing a notification ID (NID), access key, and node identifier, which are used to authenticate responses to the notification.

- The NID identifies the notification in the database.
- The notification access key is a distinct random key generated by the Notification System for each NID. The access key must be included in a response to the notification in order for a notification mailer to accept the response, thereby serving as a password that allows only users who actually received the notification containing the key to respond to that notification.
- The node identifier specifies the notification mailer node to which the message belongs.

The format of the NID line is as follows:

```
NID[NID/access_key@node_identifier]
```

### Responses by E-mail

When a user responds to a notification by e-mail, the response message must include the NID line from the original notification message. A notification mailer accepts the response only if the correct NID and access key combination is included in the response. Users can ensure that the response message contains the NID and access key either by including the entire original message when replying or by using a response template that includes the NID line.

**Note:** 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, users should verify that the NID line is included in full and contains the prefix NID and all the details between the square brackets.

A user who receives an e-mail notification message may forward the message to another user through the e-mail application. When you configure a notification

mailer, you can choose whether to allow a user to respond by e-mail to an e-mail notification that has been forwarded from another role.

- If you deselect the Allow Forwarded Response configuration parameter, the notification mailer will check if the "From:" e-mail address of the notification response exactly matches the e-mail address of the recorded recipient role, or the e-mail address of a user in that role. If the two e-mail addresses match exactly, meaning the notification was not forwarded or was forwarded according to a valid vacation routing rule, the notification mailer treats the response as a valid response. If the two e-mail addresses do not match exactly, meaning the notification was simply forwarded using the e-mail Forward command, the notification mailer does not process the response and treats it as unsolicited mail.
- If you select the Allow Forwarded Response configuration parameter, the notification mailer that receives the notification never checks the "From:" e-mail address of the notification response and always allows the response to be processed. In this case, users can delegate notifications to other users simply by forwarding the notification message through the e-mail application, and the new recipient of a forwarded notification automatically receives the authority to respond to it.

**Important:** Note that there are limitations when you deselect the Allow Forwarded Response parameter. For example, suppose a notification is sent to a distribution list mail alias that does not have a user/role relationship in the Oracle Workflow directory service. If any user from the distribution list responds to the notification, the notification mailer will always treat their notification response as unsolicited mail, because the "From:" e-mail address, which is an individual user's e-mail address, will never match the distribution list mail alias.

### Responses through the Notification Detail Link Attachment

HTML-formatted e-mail notifications with attachments and plain text e-mail notifications with HTML attachments include an attachment called Notification Detail Link. When this link is clicked, it displays the notification in the Notification Details Web page. A user who receives a notification with a Notification Detail Link attachment can use this Web page to respond directly to the notification, instead of sending an e-mail response message to be processed by a notification mailer.

You can choose whether to require users to log in before they can access the Notification Details Web page for a notification through the Notification Detail Link.

#### For Oracle Applications:

- By default, users must always log in before they can access the Notification Details page in Oracle Applications from the Notification Detail Link.
- You can optionally enable guest access to the Notification Details page. Guest access lets users access this page from e-mail notifications without logging in to Oracle Applications with an individual user name and password. This feature is not recommended due to security considerations. However, if you choose to allow guest access, you can perform the following steps to enable it:
  - Set the WF: GUEST Access to Notification profile option to **Enabled** at the site level. See: *Overview of Setting User Profiles, Oracle Applications System Administrator's Guide*.



- Create a grant assigning the "Workflow Guest User permission set" to the GUEST user. When defining the set for the grant, select the set type Navigation Menu and select the menu named "Workflow Guest User permission set" (internal code: WF\_GUEST\_GRANTS). After creating the grant, you must stop and restart Oracle HTTP Server for the change to take effect. See: Create Grant, *Oracle Applications System Administrator's Guide*.
- In Oracle Applications Manager, stop and restart the service component container named Workflow Mailer Service. For more information, see the Oracle Applications Manager online help.

With guest access, if a user navigates to the Notification Details page and is not already logged in to Oracle Applications, the user is logged in automatically as the GUEST user. The user can then respond to the notification, and can also reassign the notification or request more information if those actions are available for that notification. However, the user cannot access any other notification in the Notification Details page, nor any other Oracle Workflow Web pages.

In cases where Oracle Workflow records the identity of the logged in user who acted on a notification, the action history will show those actions as being performed by the GUEST user.

When a user views a notification through guest access, Oracle Workflow displays the notification according to the language and territory preferences of the recipient role for the notification and the date and number preferences of the GUEST user. To view notifications with their own preferences, users can log in with their own user names and passwords before accessing the notifications.

Oracle Workflow does not support guest access for notifications that require electronic signatures. If you want users to sign their notification responses with password-based signatures or certificate-based digital signatures, those users must log in with their own user names and passwords to enter their signatures.

**Note:** If you enabled guest access but no longer want to allow it, you can disable it by setting the WF: GUEST Access to Notification profile option to Disabled and setting an end date for the grant you created. Then stop and restart Oracle HTTP Server and, in Oracle Applications Manager, stop and restart the service component container named Workflow Mailer Service. Users will then always be required to log in before they can access the Notification Details page from the Notification Detail Link.

**For standalone Oracle Workflow:**

- If you select the Send Access Key configuration parameter for a notification mailer, the notification mailer includes the notification access key in the Notification Detail Link attachment. The access key allows users to access the Notification Details Web page in standalone Oracle Workflow directly by clicking the Notification Detail Link, whether they are currently logged in or not. However, if users are not already logged in, they cannot access any other notifications except the notification with which the attachment was sent.
- If you deselect the Send Access Key configuration parameter, the notification mailer does not include the access key in the Notification Detail Link. When users click the link without the access key, they are prompted to log in, if they

have not already done so, before they can access the Notification Details Web page.

### **E-mail Notification Summaries**

Instead of individual e-mail notifications, users can also receive e-mail summaries listing all their open notifications. Users can indicate that they want to receive e-mail summaries by choosing a notification preference of SUMMARY or, for Oracle Applications only, SUMHTML.

- SUMMARY - Users receive plain text e-mail summary messages, which do not enable any direct response through e-mail to the notifications they list. Instead, to respond to the individual notifications in a summary, users must log in to Oracle Workflow and access the notifications through the Worklist Web page.
- SUMHTML - Users receive HTML-formatted e-mail summary messages. An HTML-formatted summary does not enable responses through e-mail. However, it includes a link to the Worklist Web page as well as links to each notification in the Notification Details Web page, where users can respond to the individual notifications. Users must log in to Oracle Applications before they can access the Worklist and Notification Details pages, unless you enable guest access to the Notification Details page. See: Responses Through the Notification Detail Link Attachment, page 2-74.

To send e-mail summaries, schedule a Launch Summary Notifications event for a notification mailer. For the seeded Workflow Notification Mailer, the Launch Summary Notifications event is scheduled to send e-mail summary notifications once a day by default.

### **Confirming Responses with Electronic Signatures**

In Oracle Applications, you can require that the response to a notification be signed with either a password-based signature or a certificate-based digital signature. In this case, users cannot respond to that notification through e-mail. Instead, they must respond to the notification from the Notification Details Web page and enter the appropriate type of signature. To access the Notification Details page, users can either log into Oracle Applications separately, or, if their notification preference includes HTML attachments, use the Notification Detail Link.

Use the special message attribute #WF\_SIG\_POLICY to specify the signature policy for a notification. See: #WF\_SIG\_POLICY Attribute, *Oracle Workflow Developer's Guide*.

### **Excluding Notification Content From E-mail**

If a particular notification contains sensitive information that you do not want to send in e-mail, you can choose to exclude the content of the notification from the e-mail version of the notification. In this case, users receive an e-mail message that only informs them that they must access the notification through the Notification Details Web page instead to view the content and respond. To access the Notification Details page, users can either log into Oracle Applications separately, or, if their notification preference includes HTML attachments, use the Notification Detail Link.

Use the special message attribute #WF\_SECURITY\_POLICY to specify the content security policy for a notification. See: #WF\_SECURITY\_POLICY Attribute, *Oracle Workflow Developer's Guide*.

### **Sending Outbound E-mail Notifications Only**

If you do not want to allow responses by e-mail, you can choose to send only outbound e-mail notifications. To configure your notification mailers for outbound-only processing, set the inbound thread count to 0 (zero) in the configuration wizard for each notification mailer.

When you set up an outbound-only mailer, you should configure the mailer to use message templates for response-required notifications that do not request a response by e-mail, but instead direct recipients to respond from the Notification Details Web page. For example, you can configure the mailer to send response-required notifications using the Workflow View From UI message template, which is an alternative template provided by Oracle Workflow in the System: Mailer item type, or create your own custom message templates. The outbound-only mailer can still use the standard message templates to send outbound summary notifications or For Your Information (FYI) notifications that do not require a response.

### **Disabling E-mail Notifications**

Ultimately, the security of e-mail notifications depends on the security of your e-mail application. If you do not want to send any workflow information by e-mail, you can choose not to run any notification mailers at all. In this case users must always log on to Oracle Workflow and access the Worklist Web page to view and respond to their notifications.

See: Overview of Notification Handling, *Oracle Workflow User's Guide*.

### **Handling Mailer Errors:**

To check the status of a particular notification or help investigate errors, you can run a script named `wfmlrdbg.sql` that displays debugging information. In Oracle Applications, you can also obtain this information by running a diagnostic test through Oracle Diagnostics. See: `wfmlrdbg.sql`, page 7-8 and Oracle Workflow Diagnostic Tests, page D-1.

Additionally, in Oracle Applications you can run diagnostic tests through Oracle Diagnostics to check that at least one notification mailer is configured, to validate the notification mailer configuration parameters, and to check that all users with a notification preference to receive e-mail have an e-mail address defined. See: Oracle Workflow Diagnostic Tests, page D-1.

**Note:** In Oracle Applications, you must particularly check the notification preference and e-mail address for the `SYSADMIN` user. This user is the default recipient for several types of notifications such as error notifications. By default, the `SYSADMIN` user has a notification preference to receive e-mail notifications. To enable Oracle Workflow to send e-mail to this user, navigate to the Users window in Oracle Applications and assign `SYSADMIN` an e-mail address that is fully qualified with a valid domain. However, if you want to access notifications only through the Oracle Workflow Worklist Web page, then you should change the notification preference for `SYSADMIN` to "Do not send me mail" in the Preferences page. In this case you do not need to define an e-mail address. See: System Administration Setup Tasks, *Oracle Applications System Administrator's Guide*.

The Generic Service Component Framework lets you control how errors are handled through the component-level Max Error Count parameter and the container-level `SVC_COMP_MAX_ERROR_COUNT` parameter.

- The Max Error Count (`PROCESSOR_MAX_ERROR_COUNT`) parameter for a service component determines how many consecutive errors the component can encounter before its container stops it and changes its status to `Stopped with Error`. If the component's startup mode is `Automatic` or `On-Demand`, the container will then restart the component. The default value for this parameter is 10.
- The `SVC_COMP_MAX_ERROR_COUNT` parameter for a container determines how many times a component within that container can be stopped with error. If this maximum count is reached, the container changes the status of the component to `System Deactivated` and will no longer automatically restart it. The default value for this parameter is 5.

The total number of errors before a mailer is permanently stopped consists of the Max Error Count value multiplied by the `SVC_COMP_MAX_ERROR_COUNT` value. For example, using the default values, a mailer can encounter  $10 * 5 = 50$  errors before it becomes `System Deactivated`.

If a mailer encounters multiple consecutive errors, it may be advantageous to let the container restart the mailer. Restarting causes the mailer to establish new connections and instantiate new objects, which may resolve the errors. Consequently, if you want to allow more errors before you must manually intervene to restart the mailer, it is usually better to increase the `SVC_COMP_MAX_ERROR_COUNT` value than the Max Error Count value.

For more information about configuring service component and container parameters, please refer to the Oracle Workflow Manager online help.

**Note:** In Oracle Applications, if the status of a notification mailer service component changes to `Stopped with Error` or `System Deactivated`, Oracle Workflow posts a system alert to the System Alerts and Metrics page in Oracle Applications Manager. See: *System Alerts, Metrics, and Logs, Oracle Applications System Administrator's Guide - Maintenance*.

In case of a large number of errored notifications, Oracle Workflow provides special scripts for mass mailer reprocessing. Do not run these scripts unless you are directed to do so by Oracle Support.

The following scripts are located in the `$FND_TOP/patch/115/sql` directory for Oracle Applications, or in the `ORACLE_HOME/wf/admin/sql` directory for standalone Oracle Workflow.

- `wfntfqp.sql` - This script rebuilds the `WF_NOTIFICATION_OUT` queue. It drops and recreates the `WF_NOTIFICATION_OUT` queue, removes pending notification messages from the `WF_DEFERRED` queue, and repopulates the `WF_NOTIFICATION_OUT` queue from the Oracle Workflow Notification System tables.

You must stop the service component containers for notification mailers and agent listeners before you run this script, and restart the containers after the script completes. The container for notification mailers is named `Workflow Mailer Service` in Oracle Applications or `WFMLRSVC` in standalone Oracle Workflow. The

container for agent listeners is named Workflow Agent Listener Service in Oracle Applications or WFALSNRSVC in standalone Oracle Workflow.

Use the script as follows:

```
sqlplus <user/pwd> @wfntfqup <APPSuser> <APPSpwd> <FND_schema>
```

Replace <APPSuser> and <APPSpwd> with the user name and password for the APPS user in Oracle Applications, or the ORACLE user name and password for Oracle Workflow in standalone Oracle Workflow. The user name is usually apps in Oracle Applications or owf\_mgr in standalone Oracle Workflow. Replace <FND\_schema> with the ORACLE username that connects to Oracle Application Object Library data in Oracle Applications, usually applsys, or the ORACLE username for Oracle Workflow in standalone Oracle Workflow, usually owf\_mgr.

- wfnequ.sql - This script moves all the oracle.apps.wf.notification.send event messages that are on the WF\_ERROR queue back to the WF\_DEFERRED queue for reprocessing.

Use the script as follows:

```
sqlplus <user/pwd> @wfnequ <APPSuser> <APPSpwd> <FND_schema>
```

Replace <APPSuser> and <APPSpwd> with the user name and password for the APPS user in Oracle Applications, or the ORACLE user name and password for Oracle Workflow in standalone Oracle Workflow. The user name is usually apps in Oracle Applications or owf\_mgr in standalone Oracle Workflow. Replace <FND\_schema> with the ORACLE username that connects to Oracle Application Object Library data in Oracle Applications, usually applsys, or the ORACLE username for Oracle Workflow in standalone Oracle Workflow, usually owf\_mgr.

The following scripts are located in the \$FND\_TOP/patch/115/sql directory for Oracle Applications, or in the ORACLE\_HOME/wf/sql directory for standalone Oracle Workflow.

- wfntffix.sql - This script updates the MAIL\_STATUS to NULL for notifications that are ineligible to be sent by e-mail. Notifications become ineligible if the recipient role does not have a valid e-mail address defined, or if the recipient role has a notification preference set not to receive e-mail. Running this script removes ineligible notifications from the notification mailer throughput displayed in Oracle Workflow Manager, so you can review the outstanding eligible notifications only.

Use the script as follows:

```
sqlplus <user/pwd> @wfntffix
```

- wfntfsnd.sql - This script updates the MAIL\_STATUS from null to MAIL for notifications of the specified item type that were sent on or after the specified date. The recipient role of each notification must have a valid e-mail address defined. Then the script enqueues those notifications on the WF\_DEFERRED queue for reprocessing by the mailer.

For example, if users change their notification preference from not receiving e-mail to receiving e-mail, run this script to send any existing open notifications to those users by e-mail.

Use the script as follows:

```
sqlplus <user/pwd> @wfntfsnd <item_type> <begin_date_after>
```

Replace *<item\_type>* with the internal name of the item type for the notifications to update. Replace *<begin\_date\_after>* with the earliest sent date for the notifications to update.

In Oracle Applications, Oracle Workflow also provides concurrent programs that help enable mass reprocessing of notifications. See: Running Reports and Programs, *Oracle Applications User's Guide*.

- **Resend Failed Workflow Notifications (FNDWF\_NTF\_RESEND)** - This program lets you resend e-mail notifications with a mail status of `FAILED` after correcting the issues that prevented the e-mails from being sent. For example, Oracle Workflow sets a notification's mail status to `FAILED` if the e-mail address for the recipient is invalid and the e-mail cannot be delivered, if the e-mail address for the recipient is on a notification mailer's list of e-mail addresses previously found to be invalid, or if the recipient's notification preference is set to `DISABLED`. To correct these issues, correct the user's e-mail address in the Oracle Workflow directory service and then reset the user's notification preference.

Use Standard Request Submission to run this program. Specify the recipient role whose notifications you want to resend, or leave this parameter blank to resend notifications to all recipient roles. The program then re-enqueues the notifications on the notification mailer's outbound queue to be sent by e-mail.

**Note:** Run the Resend Failed Workflow Notifications program only after taking action to correct the issues that prevented the e-mails from being sent. Do not schedule the program to run repeatedly without investigating the e-mail issues; otherwise the notifications may fail again due to the same issues.

- **Move Messages from Exception to Normal Queue of Workflow Agent (FNDWF\_MOVE\_MSGS\_EXCEP2NORMAL)** - This program lets you transfer messages from an Oracle Streams Advanced Queuing (AQ) exception queue back to the associated normal queue, for queues that are assigned to an inbound agent. AQ transfers messages to an exception queue if an agent listener repeatedly encounters exceptions when attempting to dequeue messages, or if messages expire before being dequeued. To aid in mass mailer reprocessing, you can run the concurrent program for the `WF_DEFERRED` agent or `WF_NOTIFICATION_IN` agent if necessary. You can then run the appropriate agent listener to reattempt processing for the messages that have been transferred back to the agent's normal queue. See: Exception Handling for Inbound Queues, page 2-153.

## Step 9: Modifying Your Message Templates

Notification mailers use message templates defined in Oracle Workflow Builder to generate e-mail notifications. Oracle Workflow provides a set of standard templates which are used by default, as well as some alternative templates for certain types of messages. These message templates are defined in the System: Mailer item type.

Although message templates are defined as messages in Oracle Workflow Builder, they are not true messages. Rather, they serve as outlines for e-mail messages sent by notification mailers. Message templates determine the basic format of an e-mail notification, including what header information to include, and whether and where to include details such as the message due date and priority. Message templates for

notifications that require a response should also describe the syntax the reply should follow and list the information needed to confirm the notification.

It is not recommended to modify the standard templates. However, you can optionally customize the message templates used to send your e-mail notifications by either using the alternative templates provided in the System: Mailer item type by Oracle Workflow, or creating your own custom message templates in the System: Mailer item type using the Workflow Builder. You can implement alternative standard or custom templates in the following ways:

- Assign the templates you want to a particular notification mailer service component in the mailer configuration parameters. The templates assigned to a mailer override the default System: Mailer templates. See the Oracle Applications Manager online help or the Oracle Enterprise Manager online help.
- Assign the templates you want to a particular notification in a workflow process by defining special message attributes. In this case the templates assigned to the notification override both the templates assigned to a mailer and the default System: Mailer templates. See: Notification Mailer Message Template Attributes, *Oracle Workflow Developer's Guide*.

The templates in the System: Mailer item type have message attributes that represent every part of the notification message. Within the body of a template, the message attributes are token substituted to insert the specific information for a particular instance of a notification into the message outline.

**Note:** Do not modify, add new attributes to, or delete existing attributes from the standard message templates in the System: Mailer item type.

If you create new custom templates, you must name the message attributes for these templates with the same names as the message attributes for the standard templates. A notification mailer can only token substitute the attributes in the message body if you use the standard attribute names.

You can optionally omit some of the standard tokens from your custom templates, if you do not want to send the information they represent. However, you should not omit the tokens that represent the key information to be conveyed in the notification. For example, if you define a custom version of a template that includes the &BODY token, you must include the &BODY token in the custom template as well, in order to include the body text of the particular notification that is being sent into the template outline.

If you add a new token in a custom template, you must set up the necessary substitution yourself. By default, a notification mailer only performs token substitution for the standard tokens that are listed for the default templates.

Oracle Workflow provides the following message templates.

**Note:** In addition to the message templates listed here, the System: Mailer item type also includes some other messages which are not currently used.

- Workflow Open Mail (Templated) Message, page 2-82
- Orig. Workflow Open Mail (Templated) Message, page 2-85
- Workflow Open Mail (Direct) Message, page 2-87
- Orig. Workflow Open Mail (Direct) Message, page 2-90

- Workflow Open Mail for Outlook Express Message, page 2-92
- Orig. Workflow Open Mail for Outlook Express Message, page 2-95
- Workflow Open FYI Mail Message, page 2-97
- Orig. Workflow Open FYI Mail Message, page 2-99
- Workflow View From UI Message, page 2-100
- Workflow View FYI From UI Message, page 2-101
- Workflow URL Attachment Message, page 2-103
- Workflow Canceled Mail Message, page 2-104
- Orig. Workflow Canceled Mail Message, page 2-105
- Workflow Invalid Mail Message, page 2-106
- Orig. Workflow Invalid Mail Message, page 2-109
- Workflow Closed Mail Message, page 2-112
- Orig. Workflow Closed Mail Message, page 2-113
- Workflow Summary Mail Message, page 2-114
- Workflow Summary Mail (HTML) Message, page 2-115
- Workflow Warning Mail Message, page 2-116
- Workflow Signature Required Mail Message, page 2-117
- Workflow Signature Warning Mail Message, page 2-119
- Workflow Secure Mail Content Message, page 2-120
- Workflow Open Mail (More Information Request) Message, page 2-121
- Orig. Workflow Open Mail (More Information Request) Message, page 2-124
- Workflow Open Mail (More Information Request for Outlook Express) Message, page 2-126
- Workflow Invalid Open Mail (More Information Request) Message, page 2-129

See: Reviewing Notifications via Electronic Mail, *Oracle Workflow User's Guide*.

### **Workflow Open Mail (Templated) Message:**

If you use the templated response method, the Notification System uses the Workflow Open Mail (Templated) message as a default template for e-mail notifications that require a response. The notification template includes generic instructions on how to respond to a notification. It also includes the date that a response is due and any history of actions on the notification.

**Note:** The templated response method is the default response method for Oracle Workflow. Notification mailers use the templated response method unless you have manually set the internal mailer parameter named `DIRECT_RESPONSE` to Y. See: Setting Up Notification Mailers, page 2-55.

The response instructions in the plain text message body describe how to reply manually using the templated response method. This message is used for notifications sent to



performers with a notification preference of `MAILTEXT` or `MAILATTH`. The response instructions in the HTML-formatted message body describe how to reply using the automatically generated response template. This message is used for notifications sent to performers with a notification preference of `MAILHTML` or `MAILHTM2`, and is also attached to notifications sent to performers with a notification preference of `MAILATTH`.

The Workflow Open Mail (Templated) message has the following message attributes. The values are drawn from the message definition associated with a notification activity.

**START\_DATE**

The date the message is sent.

**TO**

The role the notification is sent to; the performer.

**SUBJECT**

The subject line defined in the message.

**BODY**

The text of the body defined in the message.

**COMMENT**

Comments added by the sender or the forwarder.

**PRIORITY**

The priority of the notification message.

**DUE\_DATE**

The date by which a response is required, specified in the notification activity.

**NOTIFICATION**

Required notification code used to identify the information in the notification.

**RESPONSE**

The user response section as defined by the Respond message attributes in the actual notification message definition.

**MAILTO**

The content of the HTML tag that a recipient would click on to respond to a notification. This attribute is used only for HTML e-mail notifications.

**CLICK\_HERE\_RESPONSE**

The content of the HTML tag that a recipient would click on to access the Notification Details page to respond to a notification. This attribute is not currently used.

**SENDER**

The name of the sender of the message, as displayed in the From column in the Worklist. This attribute is not currently used.

**HEADER**

Standard header attributes and any custom header attributes defined to hold key information for the message. See: Header Attributes, *Oracle Workflow Developer's Guide*.

**HISTORY**

The history of actions on the notification.

**TIMEZONE**

The time zone of the dates and times displayed in the notification, based on the time zone of the server from which the notification was sent. This attribute is not currently used.

You can customize the boilerplate text that appears in the body of the Workflow Open Mail (Templated) message, where attributes preceded by an ampersand (&) are token substituted with runtime values when the notification is sent.

The boilerplate text for a plain text message body is as follows:

```
Oracle Workflow Notification
&TIMEZONE
```

```
_____Start of Response Template_____
```

Response Template for &NOTIFICATION

To submit your response, reply to this message, including this response template with your reply. Copy and paste from this message if necessary to obtain an editable copy of the template. Insert your response value between the quotes following each response prompt.

```
&RESPONSE
```

```
_____End of Response Template_____
```

Notification Details:

```
&HEADER
```

```
&BODY
```

Due Date: &DUE\_DATE

```
&HISTORY
```

The boilerplate text for an HTML-formatted message body is as follows:

```

<HTML> <HEAD> <TITLE> Oracle Workflow Notification </TITLE>
<STYLE>
<!--
A:link {font-family:Arial,Helvetica,Geneva,sans-serif;font-size:10
pt;color:#663300}
A:active {font-family:Arial,Helvetica,Geneva,sans-serif;font-size:
10pt;color:#ff6600}
A:visited {font-family:Arial,Helvetica,Geneva,sans-serif;font-size
:10pt;color:#996633}
-->
</STYLE>
</HEAD>
<BODY BGCOLOR="#FFFFFF" >
<P><SPAN style="font-family:Arial,Helvetica,Geneva,sans-serif;font
-size:10pt;font-weight:normal;color:#336699">&TIMEZONE
</SPAN>
<P>&HEADER
<P>&BODY
<P><SPAN style="font-family:Arial,Helvetica,Geneva,sans-serif;font
-size:10pt;font-weight:normal;color:#000000">Please click on one o
f the following choices to automatically generate an E-mail respon
se. Before sending the E-mail response to close this notification
, ensure all response prompts include a desired response value wit
hin quotes.
<P>&MAILTO
</SPAN>
<P>&HISTORY
</BODY>
</HTML>

```

### Orig. Workflow Open Mail (Templated) Message:

Oracle Workflow provides the Orig. Workflow Open Mail (Templated) message as an alternative template that you can optionally use as a template for e-mail notifications that require a response if you use the templated response method. This template does not include the header attributes that are displayed in the Workflow Open Mail (Templated) message.

The Orig. Workflow Open Mail (Templated) notification template includes generic instructions on how to respond to a notification. It also includes the following information about a message: the name of the sender of the message, message priority, date that a response is due, and any comments from the sender or, if the notification is forwarded from another user, any comments from the forwarder.

**Note:** The templated response method is the default response method for Oracle Workflow. Notification mailers use the templated response method unless you have manually set the internal mailer parameter named `DIRECT_RESPONSE` to Y. See: *Setting Up Notification Mailers*, page 2-55.

The response instructions in the plain text message body describe how to reply manually using the templated response method. This message is used for notifications sent to performers with a notification preference of `MAILTEXT` or `MAILATTH`. The response instructions in the HTML-formatted message body describe how to reply using the automatically generated response template. This message is used for notifications sent

to performers with a notification preference of MAILHTML or MAILHTM2, and is also attached to notifications sent to performers with a notification preference of MAILATTH.

The Orig. Workflow Open Mail (Templated) message has the following message attributes. The values are drawn from the message definition associated with a notification activity.

**START\_DATE**

The date the message is sent.

**TO**

The role the notification is sent to; the performer.

**SUBJECT**

The subject line defined in the message.

**BODY**

The text of the body defined in the message.

**COMMENT**

Comments added by the sender or the forwarder.

**PRIORITY**

The priority of the notification message.

**DUE\_DATE**

The date by which a response is required, specified in the notification activity.

**NOTIFICATION**

Required notification code used to identify the information in the notification.

**RESPONSE**

The user response section as defined by the Respond message attributes in the actual notification message definition.

**MAILTO**

The content of the HTML tag that a recipient would click on to respond to a notification. This attribute is used only for HTML e-mail notifications.

**CLICK\_HERE\_RESPONSE**

**PONSE**

The content of the HTML tag that a recipient would click on to access the Notification Details page to respond to a notification. This attribute is not currently used.

**SENDER**

The name of the sender of the message, as displayed in the From column in the Worklist.

The boilerplate text for a plain text message body is as follows:

Oracle Workflow Notification  
From: &SENDER  
&COMMENT

\_\_\_\_\_Start of Response Template\_\_\_\_\_

Response Template for &NOTIFICATION

To submit your response, reply to this message, including this response template with your reply. Copy and paste from this message if necessary to obtain an editable copy of the template. Insert your response value between the quotes following each response prompt.

&RESPONSE

\_\_\_\_\_End of Response Template\_\_\_\_\_

Notification Details:  
&BODY

Due Date: &DUE\_DATE

The boilerplate text for an HTML-formatted message body is as follows:

```
<HTML> <HEAD> <TITLE> Oracle Workflow Notification </TITLE>
</HEAD>
<BODY BGCOLOR="#FFFFFF" >
<P>
<P><B>From: <B>&SENDER</B>
<P><B><FONT SIZE=+1>&COMMENT</FONT> </B>
<P>&BODY
<P><B>Please click on one of the following choices to automatically
generate an E-mail response. Before sending the E-mail response
to close this notification, ensure all response prompts include
a desired response value within quotes.</B>
<P>&MAILTO
</BODY>
</HTML>
```

### Workflow Open Mail (Direct) Message:

If you select the direct response method, the Notification System uses the Workflow Open Mail (Direct) message as a default template for e-mail notifications that require a response. The notification template includes generic instructions on how to respond to a notification. It also includes the date that a response is due and any history of actions on the notification.

**Note:** To select the direct response method for a notification mailer, you must manually set the internal mailer parameter named `DIRECT_RESPONSE` to Y. See: Setting Up Notification Mailers, page 2-55.

The response instructions in the plain text message body describe how to reply using the direct response method. This message is used for notifications sent to performers with a notification preference of `MAILTEXT` or `MAILATTH`. The response instructions in the HTML-formatted message body describe how to reply using the automatically generated response template. This message is used for notifications sent to performers with a

notification preference of MAILHTML or MAILHTM2, and is also attached to notifications sent to performers with a notification preference of MAILATTH.

**Note:** Responses that are generated automatically from an HTML-formatted notification or attachment always use a response template, regardless of which response method you select.

The Workflow Open Mail (Direct) message has the following message attributes. The values are drawn from the message definition associated with a notification activity.

**START\_DATE**

The date the message is sent.

**TO**

The role the notification is sent to; the performer.

**SUBJECT**

The subject line defined in the message.

**BODY**

The text of the body defined in the message.

**COMMENT**

Comments added by the sender or the forwarder.

**PRIORITY**

The priority of the notification message.

**DUE\_DATE**

The date by which a response is required, specified in the notification activity.

**NOTIFICATION**

Required notification code used to identify the information in the notification.

**RESPONSE**

The user response section as defined by the Respond message attributes in the actual notification message definition.

**MAILTO**

The content of the HTML tag that a recipient would click on to respond to a notification. This attribute is used only for HTML e-mail notifications.

**CLICK\_HERE\_RESPONSE**

The content of the HTML tag that a recipient would click on to access the Notification Details page to respond to a notification. This attribute is not currently used.

**SENDER**

The name of the sender of the message, as displayed in the From column in the Worklist. This attribute is not currently used.

**HEADER**

Standard header attributes and any custom header attributes defined to hold key information for the message. See: Header Attributes, *Oracle Workflow Developer's Guide*.

**HISTORY**

The history of actions on the notification.

## **TIMEZONE**

The time zone of the dates and times displayed in the notification, based on the time zone of the server from which the notification was sent. This attribute is not currently used.

You can customize the boilerplate text that appears in the body of the Workflow Open Mail (Direct) message, where attributes preceded by an ampersand (&) are token substituted with runtime values when the notification is sent.

The boilerplate text for a plain text message body is as follows:

```
Oracle Workflow Notification
&TIMEZONE
```

---

Response Instructions for &NOTIFICATION

To submit your response, reply to this message, including this note with your reply. The first lines of your reply must be your responses to the notification questions. Instructions below detail exactly what should be placed on each line of your reply.

&RESPONSE

---

Notification Details:

&HEADER  
&BODY

Due Date: &DUE\_DATE

&HISTORY

The boilerplate text for an HTML-formatted message body is as follows:

```

<HTML> <HEAD> <TITLE> Oracle Workflow Notification </TITLE><STYLE
>
<!--
A:link {font-family:Arial,Helvetica,Geneva,sans-serif;font-size:10
pt;color:#663300}
A:active {font-family:Arial,Helvetica,Geneva,sans-serif;font-size:
10pt;color:#ff6600}
A:visited {font-family:Arial,Helvetica,Geneva,sans-serif;font-size
:10pt;color:#996633}
--> </STYLE> </HEAD>
<BODY BGCOLOR="#FFFFFF" >
<P><SPAN style="font-family:Arial,Helvetica,Geneva,sans-serif;font
-size:10pt;font-weight:normal;color:#336699">&TIMEZONE
</SPAN>
<P>&HEADER
<P>&BODY
<P><SPAN style="font-family:Arial,Helvetica,Geneva,sans-serif;font
-size:10pt;font-weight:normal;color:#000000">Please click on one o
f the following choices to automatically generate an E-mail respon
se. Before sending the E-mail response to close this notification
, ensure all response prompts include a desired response value wit
hin quotes.
<P>&MAILTO </SPAN>
<P>&HISTORY
</BODY>
</HTML>

```

### Orig. Workflow Open Mail (Direct) Message:

Oracle Workflow provides the Orig. Workflow Open Mail (Direct) message as an alternative template that you can optionally use as a template for e-mail notifications that require a response if you select the direct response method. This template does not include the header attributes that are displayed in the Workflow Open Mail (Direct) message.

The Orig. Workflow Open Mail (Direct) notification template includes generic instructions on how to respond to a notification. It also includes the following information about a message: the name of the sender of the message, message priority, date that a response is due, and any comments from the sender of the message or, if the notification is forwarded from another user, any comments from the forwarder.

**Note:** To select the direct response method for a notification mailer, you must manually set the internal mailer parameter named `DIRECT_RESPONSE` to Y. See: Setting Up Notification Mailers, page 2-55.

The response instructions in the plain text message body describe how to reply using the direct response method. This message is used for notifications sent to performers with a notification preference of `MAILTEXT` or `MAILATTH`. The response instructions in the HTML-formatted message body describe how to reply using the automatically generated response template. This message is used for notifications sent to performers with a notification preference of `MAILHTML` or `MAILHTM2`, and is also attached to notifications sent to performers with a notification preference of `MAILATTH`.

**Note:** Responses that are generated automatically from an HTML-formatted notification or attachment always use a response template, regardless of which response method you select.



The Orig. Workflow Open Mail (Direct) message has the following message attributes. The values are drawn from the message definition associated with a notification activity.

**START\_DATE**

The date the message is sent.

**TO**

The role the notification is sent to; the performer.

**SUBJECT**

The subject line defined in the message.

**BODY**

The text of the body defined in the message.

**COMMENT**

Comments added by the sender or the forwarder.

**PRIORITY**

The priority of the notification message.

**DUE\_DATE**

The date by which a response is required, specified in the notification activity.

**NOTIFICATION**

Required notification code used to identify the information in the notification.

**RESPONSE**

The user response section as defined by the Respond message attributes in the actual notification message definition.

**MAILTO**

The content of the HTML tag that a recipient would click on to respond to a notification. This attribute is used only for HTML e-mail notifications.

**CLICK\_HERE\_RESPONSE**

**PONSE**

The content of the HTML tag that a recipient would click on to access the Notification Details page to respond to a notification. This attribute is not currently used.

**SENDER**

The name of the sender of the message, as displayed in the From column in the Worklist.

The boilerplate text for a plain text message body is as follows:

Oracle Workflow Notification  
From: &SENDER  
&COMMENT

---

#### Response Instructions for &NOTIFICATION

To submit your response, reply to this message, including this note with your reply. The first lines of your reply must be your responses to the notification questions. Instructions below detail exactly what should be placed on each line of your reply.

&RESPONSE

---

Notification Details:  
&BODY

Due Date: &DUE\_DATE

The boilerplate text for an HTML-formatted message body is as follows:

```
<HTML> <HEAD> <TITLE> Oracle Workflow Notification </TITLE> </HEAD>
<BODY BGCOLOR="#FFFFFF" >
<P>
<P>From: <B>&SENDER</B>
<P><B><FONT SIZE=+1>&COMMENT</FONT> </B>
<P>&BODY
<P><B>Please click on one of the following choices to automatically
generate an E-mail response. Before sending the E-mail response
to close this notification, ensure all response prompts include a
desired response value within quotes.</B>
<P>&MAILTO
</BODY>
</HTML>
```

#### Workflow Open Mail for Outlook Express Message:

If you use an e-mail application such as Microsoft Outlook Express as your e-mail client, you should select the standard Workflow Open Mail for Outlook Express message as a template for e-mail notifications that require a response, for users with a notification preference of MAILHTML, MAILHTM2, or MAILATTH. This message includes a link to the Notification Details Web page to let users respond to the notification there. This template is provided to accommodate e-mail applications that cannot process the response links included in the Workflow Open Mail (Templated) and Workflow Open Mail (Direct) templates.

**Note:** If you select the Workflow Open Mail for Outlook Express message template for a notification mailer, then you should also select the Workflow Open Mail (More Information Request for Outlook Express) message template for that notification mailer. See: Workflow Open Mail (More Information Request for Outlook Express) Message, page 2-126.

The response instructions in the plain text message body describe how to reply manually using the templated response method. This message is used for notifications sent to performers with a notification preference of `MAILATTH`. The HTML-formatted message body includes a link called "Click here to respond" which lets users access the notification in the Notification Details Web page to respond to the notification. This message is used for notifications sent to performers with a notification preference of `MAILHTML` or `MAILHTM2`, and is also attached to notifications sent to performers with a notification preference of `MAILATTH`.

**Note:** When users choose the "Click here to respond" link, it automatically attempts to establish a Web session with the Web server. Users must be able to connect to the Web server to use this link to respond to a notification. Users must log in to Oracle Workflow to access the Notification Details page, unless you enable guest access in Oracle Applications. See: *Reviewing Notifications via Electronic Mail*, *Oracle Workflow User's Guide* and *Responses Through the Notification Detail Link Attachment*, page 2-74.

The Workflow Open Mail for Outlook Express message has the following message attributes. The values are drawn from the message definition associated with a notification activity.

**START\_DATE**

The date the message is sent.

**TO**

The role the notification is sent to; the performer.

**SUBJECT**

The subject line defined in the message.

**BODY**

The text of the body defined in the message.

**COMMENT**

Comments added by the sender or the forwarder.

**PRIORITY**

The priority of the notification message.

**DUE\_DATE**

The date by which a response is required, specified in the notification activity.

**NOTIFICATION**

Required notification code used to identify the information in the notification.

**RESPONSE**

The user response section as defined by the Respond message attributes in the actual notification message definition.

**MAILTO**

The content of the HTML tag that a recipient would click on to respond to a notification. This attribute is not currently used.

**CLICK\_HERE\_RESPONSE**

The content of the HTML tag that a recipient would click on to access the Notification Details page to respond to a notification. This attribute is used only for HTML e-mail notifications.

**SENDER**

The name of the sender of the message, as displayed in the From column in the Worklist. This attribute is not currently used.

**HEADER**

Standard header attributes and any custom header attributes defined to hold key information for the message. See: Header Attributes, *Oracle Workflow Developer's Guide*.

**HISTORY**

The history of actions on the notification.

**TIMEZONE**

The time zone of the dates and times displayed in the notification, based on the time zone of the server from which the notification was sent. This attribute is not currently used.

You can customize the boilerplate text that appears in the body of the Workflow Open Mail for Outlook Express message, where attributes preceded by an ampersand (&) are token substituted with runtime values when the notification is sent.

The boilerplate text for a plain text message body is as follows:

```
Oracle Workflow Notification
&TIMEZONE
```

```
----- Start of Response Template -----
```

```
Response Template for &NOTIFICATION
```

To submit your response, reply to this message including this response template in your reply. Insert your response value between the quotes following each response prompt.

```
&RESPONSE
```

```
----- End of Response Template -----
```

```
Notification Details:
```

```
&HEADER
```

```
&BODY
```

```
Due Date: &DUE_DATE
```

```
&HISTORY
```

The boilerplate text for an HTML-formatted message body is as follows:

```

<HTML> <HEAD> <TITLE> Oracle Workflow Notification </TITLE> <STYL
E>
<!--
A:link {font-family:Arial,Helvetica,Geneva,sans-serif;font-size:10
pt;color:#663300}
A:active {font-family:Arial,Helvetica,Geneva,sans-serif;font-size:
10pt;color:#ff6600}
A:visited {font-family:Arial,Helvetica,Geneva,sans-serif;font-size
:10pt;color:#996633}
-->
</STYLE> </HEAD>
<BODY BGCOLOR="#FFFFFF" >
<P><SPAN style="font-family:Arial,Helvetica,Geneva,sans-serif;font
-size:10pt;font-weight:normal;color:#336699">&TIMEZONE
</SPAN>
<P>&HEADER
<P>&BODY
<P><SPAN style="font-family:Arial,Helvetica,Geneva,sans-serif;font
-size:10pt;font-weight:normal;color:#000000">&CLICK_HERE_RESPONSE
</SPAN>
<P>&HISTORY
</BODY>
</HTML>

```

### Orig. Workflow Open Mail for Outlook Express Message:

Oracle Workflow provides the Orig. Workflow Open Mail for Outlook Express message as an alternative template that you can optionally use as a template for e-mail notifications that require a response if you use an e-mail application such as Microsoft Outlook Express as your e-mail client. This template does not include the header attributes that are displayed in the Workflow Open Mail for Outlook Express message.

The Orig. Workflow Open Mail for Outlook Express message includes the name of the sender of the message, any comments from the sender or forwarder, and a link to the Notification Details Web page to let users respond to the notification there. This template can be used to accommodate e-mail applications that cannot process the response links included in the Orig. Workflow Open Mail (Templated) and Orig. Workflow Open Mail (Direct) templates.

**Note:** If you select the Orig. Workflow Open Mail for Outlook Express message template for a notification mailer, then you should also select the Workflow Open Mail (More Information Request for Outlook Express) message template for that notification mailer. See: Workflow Open Mail (More Information Request for Outlook Express) Message, page 2-126.

The response instructions in the plain text message body describe how to reply manually using the templated response method. This message is used for notifications sent to performers with a notification preference of MAILATTH. The HTML-formatted message body includes a link called "Click here to respond" which lets users access the notification in the Notification Details Web page to respond to the notification. This message is used for notifications sent to performers with a notification preference of MAILHTML or MAILHTM2, and is also attached to notifications sent to performers with a notification preference of MAILATTH.

**Note:** When users choose the "Click here to respond" link, it automatically attempts to establish a Web session with the Web server. Users must be able to connect to the Web server to use this link to respond to a notification. Users must log in to Oracle Workflow to access the Notification Details page, unless you enable guest access in Oracle Applications. See: Reviewing Notifications via Electronic Mail, *Oracle Workflow User's Guide* and Responses Through the Notification Detail Link Attachment, page 2-74.

The Orig. Workflow Open Mail for Outlook Express message has the following message attributes. The values are drawn from the message definition associated with a notification activity.

**START\_DATE**

The date the message is sent.

**TO**

The role the notification is sent to; the performer.

**SUBJECT**

The subject line defined in the message.

**BODY**

The text of the body defined in the message.

**COMMENT**

Comments added by the sender or the forwarder.

**PRIORITY**

The priority of the notification message.

**DUE\_DATE**

The date by which a response is required, specified in the notification activity.

**NOTIFICATION**

Required notification code used to identify the information in the notification.

**RESPONSE**

The user response section as defined by the Respond message attributes in the actual notification message definition.

**MAILTO**

The content of the HTML tag that a recipient would click on to respond to a notification. This attribute is not currently used.

**CLICK\_HERE\_RESPONSE**

The content of the HTML tag that a recipient would click on to access the Notification Details page to respond to a notification. This attribute is used only for HTML e-mail notifications.

**SENDER**

The name of the sender of the message, as displayed in the From column in the Worklist.

The boilerplate text for a plain text message body is as follows:

```
Oracle Workflow Notification
From: &SENDER
&COMMENT
----- Start of Response Template -----
```

Response Template for &NOTIFICATION

To submit your response, reply to this message including this response template in your reply. Insert your response value between the quotes following each response prompt.

```
&RESPONSE
----- End of Response Template -----
```

Notification Details:  
&BODY

Due Date: &DUE\_DATE

The boilerplate text for an HTML-formatted message body is as follows:

```
<HTML> <HEAD> <TITLE> Oracle Workflow Notification </TITLE> </HEAD>
<BODY BGCOLOR="#FFFFFF" >
<P>
<P>From: <B>&SENDER</B>
<P><B><FONT SIZE=+1>&COMMENT</FONT> </B>
<P>&BODY
<P>&CLICK_HERE_RESPONSE
</BODY>
</HTML>
```

### **Workflow Open FYI Mail Message:**

The Notification System uses the Workflow Open FYI Mail message as a default template for all e-mail notifications that do not require a response. The template indicates that the notification is for your information (FYI) and does not require a response. In addition to the message, the template also includes any history of actions on the notification.

The Workflow Open FYI Mail message has the following message attributes. The values are drawn from the message definition associated with a notification activity.

#### **START\_DATE**

The date the message is sent.

#### **TO**

The role the notification is sent to; the performer.

#### **SUBJECT**

The subject line defined in the message.

#### **BODY**

The text of the body defined in the message.

#### **COMMENT**

Comments added by the sender or the forwarder.

**PRIORITY**

The priority of the notification message.

**DUE\_DATE**

The date by which a response is required, specified in the notification activity.

**NOTIFICATION**

Required notification code used to identify the information in the notification.

**SENDER**

The name of the sender of the message, as displayed in the From column in the Worklist. This attribute is not currently used.

**HEADER**

Standard header attributes and any custom header attributes defined to hold key information for the message. See: Header Attributes, *Oracle Workflow Developer's Guide*.

**TIMEZONE**

The time zone of the dates and times displayed in the notification, based on the time zone of the server from which the notification was sent. This attribute is not currently used.

**HISTORY**

The history of actions on the notification.

You can customize the text that appears in the body of the Workflow Open FYI Mail template, where attributes preceded by an ampersand (&) are token substituted with runtime values when the notification is sent. The boilerplate text for the plain text message body is as follows:

```
Oracle Workflow Notification (FYI)
```

```
&TIMEZONE
```

---

```
&HEADER
```

```
&BODY
```

```
&HISTORY
```

The boilerplate text for the HTML-formatted message body is as follows:

```
<HTML><HEAD><TITLE>Oracle Workflow Notification (FYI)</TITLE><STY
LE>
<!--
A:link {font-family:Arial,Helvetica,Geneva,sans-serif;font-size:10
pt;color:#663300}
A:active {font-family:Arial,Helvetica,Geneva,sans-serif;font-size:
10pt;color:#ff6600}
A:visited {font-family:Arial,Helvetica,Geneva,sans-serif;font-size
:10pt;color:#996633}
-->
</STYLE></HEAD>
<BODY BGCOLOR="#FFFFFF">
<SPAN style="font-family:Arial,Helvetica,Geneva,sans-serif;font-si
ze:10pt;font-weight:normal;color:#336699">&TIMEZONE
</SPAN>
<P>&HEADER
<P>&BODY
<P>&HISTORY
</BODY>
</HTML>
```



**Orig. Workflow Open FYI Mail Message:**

Oracle Workflow provides the Orig. Workflow Open FYI Mail message as an alternative template that you can optionally use as a template for e-mail notifications that do not require a response. This template does not include the header attributes that are displayed in the Workflow Open FYI Mail message.

The Orig. Workflow Open FYI Mail template indicates that the notification is for your information (FYI) and does not require a response. In addition to the message, the template also includes the name of the sender of the message and any comments from the sender or forwarder.

The Orig. Workflow Open FYI Mail message has the following message attributes. The values are drawn from the message definition associated with a notification activity.

**START\_DATE**

The date the message is sent.

**TO**

The role the notification is sent to; the performer.

**SUBJECT**

The subject line defined in the message.

**BODY**

The text of the body defined in the message.

**COMMENT**

Comments added by the sender or the forwarder.

**PRIORITY**

The priority of the notification message.

**DUE\_DATE**

The date by which a response is required, specified in the notification activity.

**NOTIFICATION**

Required notification code used to identify the information in the notification.

**SENDER**

The name of the sender of the message, as displayed in the From column in the Worklist.

The boilerplate text for the plain text message body is as follows:

```
Oracle Workflow Notification (FYI)
From: &SENDER
&COMMENT
```

---

&BODY

The boilerplate text for the HTML-formatted message body is as follows:

```

<HTML><HEAD></HEAD>
<BODY BGCOLOR="#FFFFFF"><b>Oracle Workflow Notification (FYI)</b>
<br>
From: <B>&SENDER</B>
<br>&COMMENT
<hr>
<P>&BODY
</BODY>
</HTML>

```

### **Workflow View From UI Message:**

Oracle Workflow provides the Workflow View From UI message as an alternative template that you can optionally use for open response-required notifications whose content you do not want to send in e-mail. An e-mail message generated from this template will still include the header attributes for the notification, as well as any history of actions on the notification. However, the e-mail message will exclude the message body for the notification and will not enable responses through e-mail. Users can only view and respond to such notifications through the Notification Details Web page.

The notification template informs the recipient that the notification is best viewed from the Web page and directs the recipient to access the online version of the notification.

The Workflow View From UI message has the following message attributes. The values are drawn from the message definition associated with a notification activity.

#### **START\_DATE**

The date the message is sent.

#### **TO**

The role the notification is sent to; the performer.

#### **SUBJECT**

The subject line defined in the message.

#### **COMMENT**

Comments added by the sender or the forwarder.

#### **PRIORITY**

The priority of the notification message.

#### **DUE\_DATE**

The date by which a response is required, specified in the notification activity.

#### **NOTIFICATION**

Required notification code used to identify the information in the notification.

#### **SENDER**

The name of the sender of the message, as displayed in the From column in the Worklist. This attribute is not currently used.

#### **HEADER**

Standard header attributes and any custom header attributes defined to hold key information for the message. See: Header Attributes, *Oracle Workflow Developer's Guide*.

#### **HISTORY**

The history of actions on the notification.

## TIMEZONE

The time zone of the dates and times displayed in the notification, based on the time zone of the server from which the notification was sent. This attribute is not currently used.

You can customize the boilerplate text that appears in the body of the Workflow View From UI message, where attributes preceded by an ampersand (&) are token substituted with runtime values when the notification is sent.

The boilerplate text for a plain text message body is as follows:

```
Oracle Workflow Notification
&TIMEZONE
```

```
Notification Details:
&HEADER
```

```
This notification is best viewed from the Notification Detail page
.
Please access the online version of this notification.
```

```
&HISTORY
```

The boilerplate text for an HTML-formatted message body is as follows:

```
<HTML> <HEAD> <TITLE> Oracle Workflow Notification </TITLE> <STYL
E>
<!--
A:link {font-family:Arial,Helvetica,Geneva,sans-serif;font-size:10
pt;color:#663300}
A:active {font-family:Arial,Helvetica,Geneva,sans-serif;font-size:
10pt;color:#ff6600}
A:visited {font-family:Arial,Helvetica,Geneva,sans-serif;font-size
:10pt;color:#996633}
--> </STYLE></HEAD>
<BODY BGCOLOR="#FFFFFF" >
<P><SPAN style="font-family:Arial,Helvetica,Geneva,sans-serif;font
-size:10pt;font-weight:normal;color:#336699">&TIMEZONE
</SPAN>
<P>&HEADER
<P><SPAN style="font-family:Arial,Helvetica,Geneva,sans-serif;font
-size:10pt;font-weight:normal;color:#000000">This notification is
best viewed from the Notification Detail page.<BR> Please access t
he online version of this notification.
</SPAN>
<P>&HISTORY
</BODY>
</HTML>
```

## Workflow View FYI From UI Message:

Oracle Workflow provides the Workflow View FYI From UI message as an alternative template that you can optionally use for open FYI notifications whose content you do not want to send in e-mail. An e-mail message generated from this template will still include the header attributes for the notification, as well as any history of actions on the notification. However, the e-mail message will exclude the message body for the notification. Users can only view such notifications through the Notification Details Web page.

The notification template informs the recipient that the notification is best viewed from the Web page and directs the recipient to access the online version of the notification.

The Workflow View FYI From UI message has the following message attributes. The values are drawn from the message definition associated with a notification activity.

**START\_DATE**

The date the message is sent.

**TO**

The role the notification is sent to; the performer.

**SUBJECT**

The subject line defined in the message.

**COMMENT**

Comments added by the sender or the forwarder.

**PRIORITY**

The priority of the notification message.

**DUE\_DATE**

The date by which a response is required, specified in the notification activity.

**NOTIFICATION**

Required notification code used to identify the information in the notification.

**SENDER**

The name of the sender of the message, as displayed in the From column in the Worklist. This attribute is not currently used.

**HEADER**

Standard header attributes and any custom header attributes defined to hold key information for the message. See: Header Attributes, *Oracle Workflow Developer's Guide*.

**HISTORY**

The history of actions on the notification.

**TIMEZONE**

The time zone of the dates and times displayed in the notification, based on the time zone of the server from which the notification was sent. This attribute is not currently used.

You can customize the boilerplate text that appears in the body of the Workflow View FYI From UI message, where attributes preceded by an ampersand (&) are token substituted with runtime values when the notification is sent.

The boilerplate text for a plain text message body is as follows:

```
Oracle Workflow Notification
&TIMEZONE
```

```
Notification Details:
&HEADER
```

```
This notification is best viewed from the Notification Detail page
.
Please access the online version of this notification.
```

```
&HISTORY
```

The boilerplate text for an HTML-formatted message body is as follows:

```

<HTML> <HEAD> <TITLE> Oracle Workflow Notification </TITLE> <STYL
E>
<!--
A:link {font-family:Arial,Helvetica,Geneva,sans-serif;font-size:10
pt;color:#663300}
A:active {font-family:Arial,Helvetica,Geneva,sans-serif;font-size:
10pt;color:#ff6600}
A:visited {font-family:Arial,Helvetica,Geneva,sans-serif;font-size
:10pt;color:#996633}
--> </STYLE></HEAD>
<BODY BGCOLOR="#FFFFFF" >
<P><SPAN style="font-family:Arial,Helvetica,Geneva,sans-serif;font
-size:10pt;font-weight:normal;color:#336699">&TIMEZONE
</SPAN>
<P>&HEADER
<P><SPAN style="font-family:Arial,Helvetica,Geneva,sans-serif;font
-size:10pt;font-weight:normal;color:#000000">This notification is
best viewed from the Notification Detail page.<BR> Please access t
he online version of this notification.
</SPAN>
<P>&HISTORY
</BODY>
</HTML>

```

### Workflow URL Attachment Message:

The Notification System uses the Workflow URL Attachment message as a default template to create the Notification References attachment for HTML-formatted notification messages that include URL attributes with Attach Content checked. The template includes a list with links to each URL.

**Note:** The Workflow URL Attachment message template is used only for notifications that do not include embedded Oracle Applications Framework regions. For a notification that includes an embedded region, Oracle Workflow includes the Related Applications region in the e-mail message, instead of appending the Notification References attachment.

The Workflow URL Attachment message has the following message attribute. The value is drawn from the message definition associated with a notification activity.

#### URLLIST

The list of URLs to be included in the attachment.

You can customize the text that appears in the body of the Workflow URL Attachment template, where an attribute preceded by an ampersand (&) is token substituted with a runtime value when the notification is sent. The boilerplate text for the HTML-formatted message body is as follows:

```

<HTML> <HEAD> <TITLE> Oracle Workflow Notification References </T
ITLE>
<STYLE> <!--
A:link {font-family:Arial,Helvetica,Geneva,sans-serif;font-size:10
pt;color:#663300}
A:active {font-family:Arial,Helvetica,Geneva,sans-serif;font-size:
10pt;color:#ff6600}
A:visited {font-family:Arial,Helvetica,Geneva,sans-serif;font-size
:10pt;color:#996633}
--> </STYLE> </HEAD>
<BODY BGCOLOR="#FFFFFF" >
<P><h1 style="color:#336699;font-family:Arial,Helvetica,Geneva,san
s-serif;font-size:13pt;margin-bottom:0px;font-weight:bold"> Notifi
cation References</H1>

<HR WIDTH="100%">
<BR>
&URLLIST
<BR>
<HR WIDTH="100%">
<BR>&nbsp;
</BODY>
</HTML>

```

### **Workflow Canceled Mail Message:**

The default Workflow Canceled Mail message informs the recipient that a previously sent notification is canceled. If you are using the version of Oracle Workflow embedded in Oracle Applications, you can use the WF: Mailer Cancellation Email profile option to determine whether or not notification mailers should send Workflow Canceled Mail messages. See: Setting Up Notification Mailers, page 2-55.

The Workflow Canceled Mail message has the following message attributes, with values that are drawn from the message definition associated with the canceled notification activity:

#### **START\_DATE**

The date the original message was sent.

#### **TO**

The role the notification is sent to; the performer.

#### **SUBJECT**

The subject line of the original message.

#### **BODY**

The text of the original message.

#### **COMMENT**

Comments added by the sender or the forwarder.

#### **PRIORITY**

The priority of the notification message.

#### **DUE\_DATE**

The date by which a response is required, specified in the notification activity.

#### **NOTIFICATION**

Required notification code used to identify the information in the notification.

## HEADER

Standard header attributes and any custom header attributes defined to hold key information for the message. See: Header Attributes, *Oracle Workflow Developer's Guide*.

## TIMEZONE

The time zone of the dates and times displayed in the notification, based on the time zone of the server from which the notification was sent. This attribute is not currently used.

The boilerplate text for the plain text message body is as follows:

&TIMEZONE

You earlier received the notification shown below. That notification is now canceled, and no longer requires your response. You may simply delete it along with this message.

---

&HEADER

&BODY

The boilerplate text for the HTML-formatted message body is as follows:

```
<html><Head><STYLE>
<!--
A:link {font-family:Arial,Helvetica,Geneva,sans-serif;font-size:10
pt;color:#663300}
A:active {font-family:Arial,Helvetica,Geneva,sans-serif;font-size:
10pt;color:#ff6600}
A:visited {font-family:Arial,Helvetica,Geneva,sans-serif;font-size
:10pt;color:#996633}
-->
<P></STYLE></Head>
<body><SPAN style="font-family:Arial,Helvetica,Geneva,sans-serif;font-size:10pt;font-weight:normal;color:#336699">&TIMEZONE
</SPAN>
<P><SPAN style="font-family:Arial,Helvetica,Geneva,sans-serif;font-size:10pt;font-weight:normal;color:#000000">You earlier received
the notification shown below. That notification is now canceled,
and no longer requires your response. You may simply delete it al
ong with this message.
<hr>
&HEADER
<P>&BODY</SPAN>
</body></html>
```

## Orig. Workflow Canceled Mail Message:

Oracle Workflow provides the Orig. Workflow Canceled Mail message as an alternative template that you can optionally use to inform the recipient that a previously sent notification is canceled. This template does not include the header attributes that are displayed in the Workflow Canceled Mail message.

If you are using the version of Oracle Workflow embedded in Oracle Applications, you can use the WF: Mailer Cancellation Email profile option to determine whether or not notification mailers should send cancellation messages. See: Setting Up Notification Mailers, page 2-55.

The Orig. Workflow Canceled Mail message has the following message attributes, with values that are drawn from the message definition associated with the canceled notification activity:

**START\_DATE**

The date the original message was sent.

**TO**

The role the notification is sent to; the performer.

**SUBJECT**

The subject line of the original message.

**BODY**

The text of the original message.

**COMMENT**

Comments added by the sender or the forwarder.

**PRIORITY**

The priority of the notification message.

**DUE\_DATE**

The date by which a response is required, specified in the notification activity.

**NOTIFICATION**

Required notification code used to identify the information in the notification.

The boilerplate text for the plain text message body is as follows:

You earlier received the notification shown below. That notification is now canceled, and no longer requires your response. You may simply delete it along with this message.

---

&BODY

The boilerplate text for the HTML-formatted message body is as follows:

```
<html><Head></Head><body>You earlier received the notification shown below. That notification is now canceled, and no longer requires your response. You may simply delete it along with this message.
<hr>
&BODY
</body></html>
```

**Workflow Invalid Mail Message:**

The Workflow Invalid Mail message is sent to a user by default when a user responds incorrectly to a notification. For example, if a response message from a user contains a valid notification ID (NID) line matching it with a notification, but does not contain any response value or contains an invalid response value, the notification mailer sends a Workflow Invalid Mail message to the user. This message describes how to respond to the notification correctly. The message attributes are as follows:

**START\_DATE**

The date the original message was sent.



**TO**

The role the notification is sent to; the performer.

**SUBJECT**

The subject line of the original message.

**BODY**

The text of the original message.

**COMMENT**

Comments added by the sender or the forwarder.

**PRIORITY**

The priority of the notification message.

**DUE\_DATE**

The date by which a response is required, specified by the notification activity.

**NOTIFICATION**

Required notification code used to identify the information in the notification.

**RESPONSE**

The user response section as defined by the Respond message attributes in the original message definition.

**MAIL\_ERROR\_  
MESSAGE**

An error message that the mail program generates if an error occurs upon processing the response.

**MAIL\_ERROR\_STACK**

An error stack of arguments that the mail program generates if an error occurs upon processing the response. This attribute is not currently used.

**CLICK\_HERE\_RES  
PONSE**

The content of the HTML tag that a recipient would click on to access the Notification Details page to respond to a notification. This attribute is not currently used.

**MAIL\_VALUE\_FOUND**

The invalid response value found in the user's response message.

**MAIL\_EXP\_VALUES**

Information about the expected valid response values.

**HEADER**

Standard header attributes and any custom header attributes defined to hold key information for the message. See: Header Attributes, *Oracle Workflow Developer's Guide*.

**TIMEZONE**

The time zone of the dates and times displayed in the notification, based on the time zone of the server from which the notification was sent. This attribute is not currently used.

**HISTORY**

The history of actions on the notification.

The boilerplate text for the plain text message body is as follows:

Oracle Workflow Notification  
&TIMEZONE

Warning: Your previous response to this message was invalid (see error message below). Please resubmit your response.

Important: Some mail clients, notably early releases of Microsoft Outlook Express, may not copy the 'NID' line properly in your response. Please verify that the 'NID' line is included in full and contains the prefix 'NID' and all the details between the square brackets when responding.

Error Message: &MAIL\_ERROR\_MESSAGE

Value Found: &MAIL\_VALUE\_FOUND

Remarks: &MAIL\_EXP\_VALUES

---

Response Instructions for &NOTIFICATION

To submit your response, reply to this message, including this original with your reply. This note contains a special 'NID' string that is required to process the response. The first lines of your reply must be your responses to the notification questions. You should enter one line for each response required by the notification; any additional lines will be ignored. You may leave a line blank to accept the default value for that specific response. You must supply a value or a blank line for each question asked. Instructions below detail exactly what should be placed on each line of your reply.

&RESPONSE

---

Notification Details:

&HEADER

&BODY

Due Date: &DUE\_DATE

&HISTORY

The boilerplate text for the HTML-formatted message body is as follows:

```

<html><Head><STYLE>
<!--
A:link {font-family:Arial,Helvetica,Geneva,sans-serif;font-size:10
pt;color:#663300}
A:active {font-family:Arial,Helvetica,Geneva,sans-serif;font-size:
10pt;color:#ff6600}
A:visited {font-family:Arial,Helvetica,Geneva,sans-serif;font-size
:10pt;color:#996633}
--> </STYLE></Head>
<body><SPAN style="font-family:Arial,Helvetica,Geneva,sans-serif;font-size:10pt;font-weight:normal;color:#336699">&TIMEZONE
</SPAN>
<p><SPAN style="font-family:Arial,Helvetica,Geneva,sans-serif;font-size:10pt;font-weight:normal;color:#000000">Warning: Your previous response to this message was invalid (see error message below).
Please resubmit your response.
<P>&MAIL_ERROR_MESSAGE
<BR>
<BR>Value Found: &MAIL_VALUE_FOUND
<BR>
<BR>Remarks: &MAIL_EXP_VALUES
<HR>
<P>&HEADER
<P>&BODY
<P><B>Please click on one of the following choices to automatically generate an E-mail response. Before sending the E-mail response to close this notification, ensure all response prompts include a desired response value within quotes.</B>
<P><B>Important:</B> Some mail clients, notably early releases of Microsoft Outlook Express, may not copy the 'NID' line properly in your response. Please verify that the 'NID' line is included in full and contains the prefix 'NID' and all the details between the square brackets when responding.
<P>&MAILTO</SPAN>
<P>&HISTORY
</BODY>
</HTML>

```

### **Orig. Workflow Invalid Mail Message:**

Oracle Workflow provides the Orig. Workflow Invalid Mail message as an alternative template that you can optionally use when a user responds incorrectly to a notification. This template does not include the header attributes that are displayed in the Workflow Invalid Mail message.

The Orig. Workflow Invalid Mail message describes how to respond to the notification correctly. The message attributes are as follows:

#### **START\_DATE**

The date the original message was sent.

#### **TO**

The role the notification is sent to; the performer.

#### **SUBJECT**

The subject line of the original message.

**BODY**

The text of the original message.

**COMMENT**

Comments added by the sender or the forwarder.

**PRIORITY**

The priority of the notification message.

**DUE\_DATE**

The date by which a response is required, specified by the notification activity.

**NOTIFICATION**

Required notification code used to identify the information in the notification.

**RESPONSE**

The user response section as defined by the Respond message attributes in the original message definition.

**MAIL\_ERROR\_  
MESSAGE**

An error message that the mail program generates if an error occurs upon processing the response.

**MAIL\_ERROR\_STACK**

An error stack of arguments that the mail program generates if an error occurs upon processing the response. This attribute is not currently used.

**CLICK\_HERE\_RES  
PONSE**

The content of the HTML tag that a recipient would click on to access the Notification Details page to respond to a notification. This attribute is not currently used.

**MAIL\_VALUE\_FOUND**

The invalid response value found in the user's response message.

**MAIL\_EXP\_VALUES**

Information about the expected valid response values.

The boilerplate text for the plain text message body is as follows:

Oracle Workflow Notification  
&COMMENT

Warning: Your previous response to this message was invalid (see error message below). Please resubmit your response.

Important: Some mail clients, notably early releases of Microsoft Outlook Express, may not copy the 'NID' line properly in your response. Please verify that the 'NID' line is included in full and contains the prefix 'NID' and all the details between the square brackets when responding.

Error Message: &MAIL\_ERROR\_MESSAGE

Value Found: &MAIL\_VALUE\_FOUND

Remarks: &MAIL\_EXP\_VALUES

-----

Response Instructions for &NOTIFICATION

To submit your response, reply to this message, including this original with your reply. This note contains a special 'NID' string that is required to process the response. The first lines of your reply must be your responses to the notification questions. You should enter one line for each response required by the notification; any additional lines will be ignored. You may leave a line blank to accept the default value for that specific response. You must supply a value or a blank line for each question asked. Instructions below detail exactly what should be placed on each line of your reply.

&RESPONSE

-----

Notification Details:  
&BODY

Due Date: &DUE\_DATE

The boilerplate text for the HTML-formatted message body is as follows:

```

<html><Head></Head><body>Warning: Your previous response to this
message was invalid (see error message below). Please resubmit yo
ur response.
<P>Error Message: &MAIL_ERROR_MESSAGE
<BR>
<BR>Value Found: &MAIL_VALUE_FOUND
<BR>
<BR>Remarks: &MAIL_EXP_VALUES
<HR><P><B><FONT SIZE=+1>&COMMENT</FONT> </B>
<P>&BODY
<P><B>Please click on one of the following choices to automaticall
y generate an E-mail response. Before sending the E-mail response
to close this notification, ensure all response prompts include a
desired response value within quotes.</B>
<P><B>Important:</B> Some mail clients, notably early releases of
Microsoft Outlook Express, may not copy the 'NID' line properly in
your response. Please verify that the 'NID' line is included in f
ull and contains the prefix 'NID' and all the details between the
square brackets when responding.
<P>&MAILTO
</BODY>
</HTML>

```

### **Workflow Closed Mail Message:**

The default Workflow Closed Mail message informs the recipient that a previously sent notification is now closed. It has the following message attributes, with values that are drawn from the message definition associated with the closed notification activity:

#### **START\_DATE**

The date the original message was sent.

#### **TO**

The role the notification is sent to; the performer.

#### **SUBJECT**

The subject line of the original message.

#### **BODY**

The text of the original message.

#### **COMMENT**

Comments added by the sender or the forwarder.

#### **PRIORITY**

The priority of the notification message.

#### **DUE\_DATE**

The date by which a response is required, specified in the notification activity.

#### **NOTIFICATION**

Required notification code used to identify the information in the notification.

#### **HEADER**

Standard header attributes and any custom header attributes defined to hold key information for the message. See: Header Attributes, *Oracle Workflow Developer's Guide*.

### TIMEZONE

The time zone of the dates and times displayed in the notification, based on the time zone of the server from which the notification was sent. This attribute is not currently used.

The boilerplate text for the plain text message body is as follows:

&TIMEZONE

You earlier received the notification shown below. That notification is now closed, and no longer requires your response. You may simply delete it along with this message.

-----  
&HEADER

&BODY

The boilerplate text for the HTML-formatted message body is as follows:

```
<html><Head><STYLE>
<!--
A:link {font-family:Arial,Helvetica,Geneva,sans-serif;font-size:10
pt;color:#663300}
A:active {font-family:Arial,Helvetica,Geneva,sans-serif;font-size:
10pt;color:#ff6600}
A:visited {font-family:Arial,Helvetica,Geneva,sans-serif;font-size
:10pt;color:#996633}
-->
<P></STYLE></Head>
<body><SPAN style="font-family:Arial,Helvetica,Geneva,sans-serif;font-size:10pt;font-weight:normal;color:#336699">&TIMEZONE
</SPAN>
<P><SPAN style="font-family:Arial,Helvetica,Geneva,sans-serif;font-size:10pt;font-weight:normal;color:#000000">You earlier received
the notification shown below. That notification is now closed, and no longer requires your response. You may simply delete it along with this message.
<hr>
&HEADER
<P>&BODY</SPAN>
</body></html>
```

### Orig. Workflow Closed Mail Message:

Oracle Workflow provides the Orig. Workflow Closed Mail message as an alternative template that you can optionally use to inform the recipient that a previously sent notification is now closed. This template does not include the header attributes that are displayed in the Workflow Closed Mail message.

The Orig. Workflow Closed Mail message has the following message attributes, with values that are drawn from the message definition associated with the closed notification activity:

### START\_DATE

The date the original message was sent.

### TO

The role the notification is sent to; the performer.

**SUBJECT**

The subject line of the original message.

**BODY**

The text of the original message.

**COMMENT**

Comments added by the sender or the forwarder.

**PRIORITY**

The priority of the notification message.

**DUE\_DATE**

The date by which a response is required, specified in the notification activity.

**NOTIFICATION**

Required notification code used to identify the information in the notification.

The boilerplate text for the plain text message body is as follows:

```
You earlier received the notification shown below. That notification is now closed, and no longer requires your response. You may simply delete it along with this message.
```

```
-----
&BODY
```

The boilerplate text for the HTML-formatted message body is as follows:

```
<html><Head></Head><body>You earlier received the notification shown below. That notification is now closed, and no longer requires your response. You may simply delete it along with this message
.
<hr>
&BODY
</body></html>
```

**Workflow Summary Mail Message:**

In standalone Oracle Workflow, the Notification System uses the Workflow Summary Mail message by default as a template to send a summary of workflow notifications to users and roles that have their notification preference set to SUMMARY in the Oracle Workflow directory service. The Workflow Summary Mail message summarizes all currently open notifications for a given user/role. It has the following message attributes, with values that are drawn from the message definition associated with the open notification activity:

**Note:** In Oracle Applications, the Notification System uses the Workflow Summary Mail (HTML) message as the template for summary notifications. See: Workflow Summary Mail (HTML) Message, page 2-115.

**SUMMARY**

Summary report.

**USER\_NAME**

The user/role the notification summary is sent to; the performer.



**SYSDATE**

The current date.

**TIMEZONE**

The time zone of the dates and times displayed in the notification, based on the time zone of the server from which the notification was sent. This attribute is not currently used.

The boilerplate text for the plain text message body is as follows:

```
Summary of Notifications for '&USER_NAME'
(Please use the Notifications web page to see details or respond.)
&TIMEZONE
-----
```

&SUMMARY

The HTML-formatted message body is not used for this template.

**Workflow Summary Mail (HTML) Message:**

In Oracle Applications, the Notification System uses the Workflow Summary Mail (HTML) message by default as a template to send a summary of workflow notifications to users and roles that have their notification preference set to SUMMARY or SUMHTML in the Oracle Workflow directory service. The Workflow Summary Mail (HTML) message summarizes all currently open notifications for a given user/role. The HTML-formatted message body also provides a link to the Worklist Web page as well as links to each notification in the Notification Details Web page.

**Note:** The SUMHTML notification preference is currently supported only for the version of Oracle Workflow embedded in Oracle Applications.

**Note:** In standalone Oracle Workflow, the Notification System uses the Workflow Summary Mail message as the template for summary notifications. See: Workflow Summary Mail Message, page 2-114.

The Workflow Summary Mail (HTML) message has the following message attributes, with values that are drawn from the message definition associated with the open notification activity:

**SUMMARY**

Summary report.

**USER\_NAME**

The user/role the notification summary is sent to; the performer.

**SYSDATE**

The current date.

**TIMEZONE**

The time zone of the dates and times displayed in the notification, based on the time zone of the server from which the notification was sent. This attribute is not currently used.

The plain text message body is used for notifications sent to performers with a notification preference of SUMMARY. The boilerplate text for the plain text message body is as follows:

&TIMEZONE  
&SUMMARY

The HTML-formatted message body is used for notifications sent to performers with a notification preference of SUMHTML. The boilerplate text for the HTML-formatted message body is as follows:

```
<HTML><HEAD>
<STYLE>
A:link {font-family:Arial,Helvetica, Geneva,sans-serif;font-size:10
pt;color:#663300}
A:active {font-family:Arial,Helvetica, Geneva,sans-serif;font-size:
10pt;color:#ff6600}
A:visited {font-family:Arial,Helvetica, Geneva,sans-serif;font-size
:10pt;color:#996633}
</STYLE>
<TITLE>Summary Notification</TITLE></HEAD><BODY>
<SPAN style="font-family:Arial,Helvetica, Geneva,sans-serif;font-si
ze:10pt;font-weight:normal;color:#336699">&TIMEZONE
</SPAN>
<P>&SUMMARY
</BODY>
</HTML>
```

### **Workflow Warning Mail Message:**

The Notification System uses the Workflow Warning Mail message as a default template to send a message to a user the first time it receives unsolicited mail from that user. For example, if a message from a user does not contain a notification ID (NID) line matching it with a notification, or contains an incorrectly formatted NID line, the notification mailer sends a Workflow Warning Mail message to the user. This message has the following message attributes, with values that are drawn from the unsolicited mail:

#### **UBODY**

The text of the unsolicited mail message body.

#### **USUBJECT**

The text of the unsolicited mail subject line.

#### **UFROM**

The address of the user that sent the unsolicited mail.

The boilerplate text for the plain text message body is as follows:

Messages sent to this account are processed automatically by the Oracle Workflow Notification Mailer. The message you sent did not appear to be in response to a notification. If you are responding to a notification, please use the response template that was included with your notification. Take care to include the 'NID' line of the template in your reply. If you are not responding to a notification, please do not send mail to this account.

Important: Some mail clients, notably early releases of Microsoft Outlook Express, may not copy the 'NID' line properly in your response. Please verify that the 'NID' line is included in full and contains the prefix 'NID' and all the details between the square brackets when responding.

-----  
From: &UFROM  
Subject: &USUBJECT

&UBODY

The boilerplate text for the HTML-formatted message body is as follows:

```
<html><head></head><body>
<SPAN style="font-family:Arial,Helvetica,Geneva,sans-serif;font-size:10pt;font-weight:normal;color:#000000"><B>Messages sent to this
account are processed automatically by the Oracle Workflow Notification Mailer. The message you sent did not appear to be in response to a notification. If you are responding to a notification, please use the auto-generated reply created when responding to the original message. This contains the 'NID' line which is necessary for identification. If you are not responding to a notification, please do not send mail to this account.
<P><B>Important:</B> Some mail clients, notably early releases of Microsoft Outlook Express, may not copy the 'NID' line properly in your response. Please verify that the 'NID' line is included in full and contains the prefix 'NID' and all the details between the square brackets when responding.
<hr>
<P>From: &UFROM
<BR>Subject: &USUBJECT</SPAN>

<P>&UBODY

</body></html>
```

### Workflow Signature Required Mail Message:

The Notification System uses the Workflow Signature Required Mail message as a default template for e-mail notifications that require an electronic signature in the user's response. Users can only respond to such notifications through the Notification Details Web page, where they can enter either a password-based signature or a certificate-based digital signature, depending on the notification's requirements, to sign the response. The notification template informs the recipient that a signature is required and that the response cannot be submitted through e-mail. Instead, the notification template directs the recipient to access the online version of the notification to submit a response.

**Note:** Electronic signatures are currently supported only for the version of Oracle Workflow embedded in Oracle Applications.

The Workflow Signature Required Mail message has the following message attributes. The values are drawn from the message definition associated with a notification activity.

**DUE\_DATE**

The date by which a response is required, specified in the notification activity.

**BODY**

The text of the body defined in the message.

**NOTIFICATION**

Required notification code used to identify the information in the notification. For notifications that require an electronic signature to be entered online, this notification code does not include the access key or node identifier information that would be needed for an e-mail response.

**SENDER**

The name of the sender of the message, as displayed in the From column in the Worklist. This attribute is not currently used.

**SUBJECT**

The subject line defined in the message.

**HEADER**

Standard header attributes and any custom header attributes defined to hold key information for the message. See: Header Attributes, *Oracle Workflow Developer's Guide*.

**HISTORY**

The history of actions on the notification.

**COMMENT**

Comments added by the sender or the forwarder.

**TIMEZONE**

The time zone of the dates and times displayed in the notification, based on the time zone of the server from which the notification was sent. This attribute is not currently used.

You can customize the boilerplate text that appears in the body of the Workflow Signature Required Mail message, where attributes preceded by an ampersand (&) are token substituted with runtime values when the notification is sent.

The boilerplate text for a plain text message body is as follows:

```
Oracle Workflow Notification
&TIMEZONE
&HEADER
```

This notification requires a signature in your response. You cannot respond to this notification through e-mail. Please access the online version of the notification to submit your response.

```
&HISTORY
```

The boilerplate text for an HTML-formatted message body is as follows:

```

<HTML> <HEAD> <TITLE> Oracle Workflow Notification </TITLE> <STYL
E>
<!--
A:link {font-family:Arial,Helvetica,Geneva,sans-serif;font-size:10
pt;color:#663300}
A:active {font-family:Arial,Helvetica,Geneva,sans-serif;font-size:
10pt;color:#ff6600}
A:visited {font-family:Arial,Helvetica,Geneva,sans-serif;font-size
:10pt;color:#996633}
--> </STYLE></HEAD>
<BODY BGCOLOR="#FFFFFF" >
<P><SPAN style="font-family:Arial,Helvetica,Geneva,sans-serif;font
-size:10pt;font-weight:normal;color:#336699">&TIMEZONE
</SPAN>
<P>&HEADER
<P><SPAN style="font-family:Arial,Helvetica,Geneva,sans-serif;font
-size:10pt;font-weight:normal;color:#000000"><B>This notification
requires a signature in your response. You cannot respond to this
notification through e-mail. Please access the online version of t
he notification to submit your response.</B></SPAN>
<P>&HISTORY
</BODY>
</HTML>

```

See: #WF\_SIG\_POLICY Attribute, *Oracle Workflow Developer's Guide*.

### Workflow Signature Warning Mail Message:

The Workflow Signature Warning Mail message is sent to a user by default if that user sends an e-mail response containing the notification ID (NID) line of a notification that requires an electronic signature. A valid response to such a notification can only be submitted through the Notification Details Web page. The notification template informs the recipient that a signature is required and that the response cannot be submitted through e-mail. Instead, the notification template directs the recipient to access the online version of the notification to submit a response.

**Note:** Electronic signatures are currently supported only for the version of Oracle Workflow embedded in Oracle Applications.

The Workflow Signature Warning Mail message has the following message attributes. The values are drawn from the message definition associated with a notification activity.

#### SUBJECT

The subject line of the original message.

#### COMMENT

Comments added by the sender or the forwarder.

#### BODY

The text of the original message.

#### HEADER

Standard header attributes and any custom header attributes defined to hold key information for the message. See: Header Attributes, *Oracle Workflow Developer's Guide*.

## TIMEZONE

The time zone of the dates and times displayed in the notification, based on the time zone of the server from which the notification was sent. This attribute is not currently used.

You can customize the boilerplate text that appears in the body of the Workflow Signature Warning Mail message, where attributes preceded by an ampersand (&) are token substituted with runtime values when the notification is sent.

The boilerplate text for a plain text message body is as follows:

```
Oracle Workflow Notification
&TIMEZONE
&COMMENT
```

Warning: You earlier received the notification shown below. This notification requires a signature in your response. You cannot respond to this notification through e-mail. Please access the online version of the notification to submit your response.

---

```
&HEADER
&BODY
```

The boilerplate text for an HTML-formatted message body is as follows:

```
<html><Head><STYLE>
<!--
A:link {font-family:Arial,Helvetica, Geneva,sans-serif;font-size:10
pt;color:#663300}
A:active {font-family:Arial,Helvetica, Geneva,sans-serif;font-size:
10pt;color:#ff6600}
A:visited {font-family:Arial,Helvetica, Geneva,sans-serif;font-size
:10pt;color:#996633}
--> </STYLE></Head>
<body><P><SPAN style="font-family:Arial,Helvetica, Geneva,sans-seri
f;font-size:10pt;font-weight:normal;color:#336699">&TIMEZONE
</SPAN>
<P><SPAN style="font-family:Arial,Helvetica, Geneva,sans-serif;font
-size:10pt;font-weight:normal;color:#000000">Warning: You earlier
received the notification shown below. This notification requires
a signature in your response. You cannot respond to this notificat
ion through e-mail. Please access the online version of the notifi
cation to submit your response.</SPAN>
<hr>
<P><B><FONT SIZE=+1>&COMMENT</FONT> </B>
<P>&HEADER
<P>&HISTORY
<P>&BODY
</body></html>
```

See: #WF\_SIG\_POLICY Attribute, *Oracle Workflow Developer's Guide*.

## Workflow Secure Mail Content Message:

The Notification System uses the Workflow Secure Mail Content message as a default template for notifications that include sensitive content that cannot be sent in e-mail for security reasons. You can mark notifications as including secure content using the special #WF\_SECURITY\_POLICY message attribute. Users can only view and respond to such notifications through the Notification Details Web page. The notification template

informs the recipient that the notification content cannot be sent in e-mail and directs the recipient to access the online version of the notification instead.

The Workflow Secure Mail Content message has the following message attributes. The values are drawn from the message definition associated with a notification activity.

#### **NOTIFICATION**

Required notification code used to identify the information in the notification.

#### **SUBJECT**

The subject line defined in the message.

You can customize the boilerplate text that appears in the body of the Workflow Secure Mail Content message, where attributes preceded by an ampersand (&) are token substituted with runtime values when the notification is sent.

The boilerplate text for a plain text message body is as follows:

```
Oracle Workflow Notification
```

---

```
Notification &NOTIFICATION
```

```
This notification contains secure content which cannot be sent through e-mail. Please access the online version of the notification to see the details.
```

---

The boilerplate text for an HTML-formatted message body is as follows:

```
<HTML> <HEAD> <TITLE> Oracle Workflow Notification </TITLE> </HEAD>
<BODY BGCOLOR="#FFFFFF" >
<P>
<P><SPAN style="font-family:Arial,Helvetica,Geneva,sans-serif;font-size:10pt;font-weight:normal;color:#000000">Notification: &NOTIFICATION
<br><br>
<B>This notification contains secure content which cannot be sent through e-mail. Please access the online version of the notification to see the details.</B></SPAN>
</BODY>
</HTML>
```

See: #WF\_SECURITY\_POLICY Attribute, *Oracle Workflow Developer's Guide*.

#### **Workflow Open Mail (More Information Request) Message:**

The Notification System uses the Workflow Open Mail (More Information Request) message as a default template to send a request for more information about a notification from one user to another user. The notification template includes generic instructions on how to respond with the requested information. It also includes the following information about a message: the name of the sender of the message, any history of actions on the notification, and the date that a response is due.

The response instructions in the plain text message body describe how to reply manually. This message is used for notifications sent to performers with a notification preference of MAILTEXT or MAILATTH. The response instructions in the HTML-formatted message body describe how to reply using the automatically generated

response template. This message is used for notifications sent to performers with a notification preference of MAILHTML or MAILHTM2, and is also attached to notifications sent to performers with a notification preference of MAILATTH.

The Workflow Open Mail (More Information Request) message has the following message attributes. The values are drawn from the message definition associated with a notification activity.

**DUE\_DATE**

The date by which a response is required, specified in the notification activity.

**BODY**

The text of the body defined in the message.

**SUBJECT**

The subject line defined in the message.

**COMMENT**

Comments added by the sender or the forwarder.

**SENDER**

The name of the sender of the message, as displayed in the From column in the Worklist.

**HISTORY**

The history of actions on the notification.

**QUESTION**

Details about what information is being requested.

**RESPONSE**

The user response section.

**NOTIFICATION**

Required notification code used to identify the information in the notification.

**HEADER**

Standard header attributes and any custom header attributes defined to hold key information for the message. See: Header Attributes, *Oracle Workflow Developer's Guide*.

**TIMEZONE**

The time zone of the dates and times displayed in the notification, based on the time zone of the server from which the notification was sent. This attribute is not currently used.

You can customize the boilerplate text that appears in the body of the Workflow Open Mail (More Information Request) message, where attributes preceded by an ampersand (&) are token substituted with runtime values when the notification is sent.

The boilerplate text for a plain text message body is as follows:



Oracle Workflow Notification  
&TIMEZONE

\_\_\_\_\_Start of Response Template\_\_\_\_\_

More Information Template for &NOTIFICATION

User &SENDER has requested more information for the notification.  
Please reply to this message, including this response template with  
your reply. Copy and paste from this message if necessary to obtain  
an editable copy of the template. Insert your comments between  
the quotes against the prompt.

Question: &QUESTION

&RESPONSE

\_\_\_\_\_End of Response Template\_\_\_\_\_

Notification Details:

&HEADER

&BODY

Due Date: &DUE\_DATE

&HISTORY

The boilerplate text for an HTML-formatted message body is as follows:

```

<HTML> <HEAD> <TITLE> Oracle Workflow Notification </TITLE><STYLE
>
<!--
A:link {font-family:Arial,Helvetica,Geneva,sans-serif;font-size:10
pt;color:#663300}
A:active {font-family:Arial,Helvetica,Geneva,sans-serif;font-size:
10pt;color:#ff6600}
A:visited {font-family:Arial,Helvetica,Geneva,sans-serif;font-size
:10pt;color:#996633}
--> </STYLE> </HEAD>
<BODY BGCOLOR="#FFFFFF" >
<P><SPAN style="font-family:Arial,Helvetica,Geneva,sans-serif;font
-size:10pt;font-weight:normal;color:#336699">&TIMEZONE
</SPAN>

<P><SPAN style="font-family:Arial,Helvetica,Geneva,sans-serif;font
-size:10pt;font-weight:normal;color:#000000">
<P>Question: <B>&QUESTION</B>
<P><B>Please click on the following link to automatically generate
an E-mail response for this question. Before sending the E-mail
response, ensure desired comments within quotes.</B>
<P>&MAILTO
<P><B>Notification Detail:</B></SPAN>
<P>&HEADER
<P>&BODY
<BR>
<SPAN style="font-family:Arial,Helvetica,Geneva,sans-serif;font-si
ze:10pt;font-weight:normal;color:#000000">Question:
<B>&QUESTION</B>
<P><B>Please click on the following link to automatically generate
an E-mail response for this question. Before sending the E-mail
response, ensure desired comments within quotes.</B>
<P>&MAILTO </SPAN>
<P>&HISTORY
</BODY>
</HTML>

```

### Orig. Workflow Open Mail (More Information Request) Message:

Oracle Workflow provides the Orig. Workflow Open Mail (More Information Request) message as an alternative template that you can optionally use as a template to send a request for more information about a notification from one user to another user. This template does not include the header attributes that are displayed in the Workflow Open Mail (More Information Request) message.

The Orig. Workflow Open Mail (More Information Request) notification template includes generic instructions on how to respond with the requested information. It also includes the following information about a message: the name of the sender of the message, the date that a response is due, and any history of actions on the notification.

The response instructions in the plain text message body describe how to reply manually. This message is used for notifications sent to performers with a notification preference of MAILTEXT or MAILATTH. The response instructions in the HTML-formatted message body describe how to reply using the automatically generated response template. This message is used for notifications sent to performers with a

notification preference of MAILHTML or MAILHTM2, and is also attached to notifications sent to performers with a notification preference of MAILATTH.

The Orig. Workflow Open Mail (More Information Request) message has the following message attributes. The values are drawn from the message definition associated with a notification activity.

**DUE\_DATE**

The date by which a response is required, specified in the notification activity.

**BODY**

The text of the body defined in the message.

**SUBJECT**

The subject line defined in the message.

**COMMENT**

Comments added by the sender or the forwarder.

**SENDER**

The name of the sender of the message, as displayed in the From column in the Worklist.

**HISTORY**

The history of actions on the notification.

**QUESTION**

Details about what information is being requested.

**RESPONSE**

The user response section.

**NOTIFICATION**

Required notification code used to identify the information in the notification.

The boilerplate text for a plain text message body is as follows:

Oracle Workflow Notification

\_\_\_\_\_ Start of Response Template \_\_\_\_\_

More Information Template for &NOTIFICATION

User &SENDER has requested more information for the notification. Please reply to this message, including this response template with your reply. Copy and paste from this message if necessary to obtain an editable copy of the template. Insert your comments between the quotes against the prompt.

Question: &QUESTION

&RESPONSE

\_\_\_\_\_ End of Response Template \_\_\_\_\_

Notification Details:

&BODY

Due Date: &DUE\_DATE

&HISTORY

The boilerplate text for an HTML-formatted message body is as follows:

```

<HTML> <HEAD> <TITLE> Oracle Workflow Notification </TITLE> </HEAD>
<BODY BGCOLOR="#FFFFFF" >
<P>
<P>User &SENDER has requested more information for the following notification.
<P>&BODY
<P>Question: <B>&QUESTION</B>
<P><B>Please click on the following link to automatically generate an E-mail response for this question. Before sending the E-mail response, ensure desired comments within quotes.</B>
<P>&MAILTO
<P>&HISTORY
</BODY>
</HTML>

```

### **Workflow Open Mail (More Information Request for Outlook Express) Message:**

If you use an e-mail application such as Microsoft Outlook Express as your e-mail client, you should select the standard Workflow Open Mail (More Information Request for Outlook Express) message as a template for requests for more information about a notification from one user to another user, for users with a notification preference of MAILHTML, MAILHTM2, or MAILATTH. This message includes a link to the Notification Details Web page to let users respond to the request there. This template is provided to accommodate e-mail applications that cannot process the response links included in the Workflow Open Mail (More Information Request) template. In particular, if you select the Workflow Open Mail for Outlook Express message template for a notification mailer, then you should also select the Workflow Open Mail (More Information Request for Outlook Express) message template for that notification mailer. See: Workflow Open Mail for Outlook Express Message, page 2-92.

**Note:** To select the Workflow Open Mail (More Information Request for Outlook Express) message template for a notification mailer, you must manually set the internal mailer parameter named OPEN\_MORE\_INFO to the value OPEN\_MORE\_INFO\_OUTLOOK. See: Setting Up Notification Mailers, page 2-55.

The response instructions in the plain text message body describe how to reply manually using the templated response method. This message is used for notifications sent to performers with a notification preference of MAILATTH. The HTML-formatted message body includes a link called "Click here to respond" which lets users access the notification in the Notification Details Web page to respond to the request for information. This message is used for notifications sent to performers with a notification preference of MAILHTML or MAILHTM2, and is also attached to notifications sent to performers with a notification preference of MAILATTH.

**Note:** When users choose the "Click here to respond" link, it automatically attempts to establish a Web session with the Web server. Users must be able to connect to the Web server to use this link to respond to a notification. See: Reviewing Notifications via Electronic Mail, *Oracle Workflow User's Guide*.

The Workflow Open Mail (More Information Request for Outlook Express) message has the following message attributes. The values are drawn from the message definition associated with a notification activity.

**DUE\_DATE**

The date by which a response is required, specified in the notification activity.

**BODY**

The text of the body defined in the message.

**SUBJECT**

The subject line defined in the message.

**COMMENT**

Comments added by the sender or the forwarder.

**SENDER**

The name of the sender of the message, as displayed in the From column in the Worklist.

**HISTORY**

The history of actions on the notification.

**QUESTION**

Details about what information is being requested.

**RESPONSE**

The user response section.

**NOTIFICATION**

Required notification code used to identify the information in the notification.

**HEADER**

Standard header attributes and any custom header attributes defined to hold key information for the message. See: Header Attributes, *Oracle Workflow Developer's Guide*.

**TIMEZONE**

The time zone of the dates and times displayed in the notification, based on the time zone of the server from which the notification was sent. This attribute is not currently used.

**CLICK\_HERE\_RESPONSE**

The content of the HTML tag that a recipient would click on to access the Notification Details page to respond to a request for more information. This attribute is used only for HTML e-mail notifications.

You can customize the boilerplate text that appears in the body of the Workflow Open Mail (More Information Request for Outlook Express) message, where attributes preceded by an ampersand (&) are token substituted with runtime values when the notification is sent.

The boilerplate text for a plain text message body is as follows:

Oracle Workflow Notification  
&TIMEZONE

\_\_\_\_\_Start of Response Template\_\_\_\_\_

More Information Template for &NOTIFICATION

User &SENDER has requested more information for the notification. Please reply to this message, including this response template with your reply. Copy and paste from this message if necessary to obtain an editable copy of the template. Insert your comments between the quotes against the prompt.

Question: &QUESTION

&RESPONSE

\_\_\_\_\_End of Response Template\_\_\_\_\_

Notification Details:  
&HEADER  
&BODY

Due Date: &DUE\_DATE

&HISTORY

The boilerplate text for an HTML-formatted message body is as follows:

```

<HTML> <HEAD> <TITLE> Oracle Workflow Notification </TITLE><STYLE
>
<!--
A:link {font-family:Arial,Helvetica,Geneva,sans-serif;font-size:10
pt;color:#663300}
A:active {font-family:Arial,Helvetica,Geneva,sans-serif;font-size:
10pt;color:#ff6600}
A:visited {font-family:Arial,Helvetica,Geneva,sans-serif;font-size
:10pt;color:#996633}
--> </STYLE> </HEAD>
<BODY BGCOLOR="#FFFFFF" >
<P><SPAN style="font-family:Arial,Helvetica,Geneva,sans-serif;font
-size:10pt;font-weight:normal;color:#336699">&TIMEZONE
</SPAN>
<P><SPAN style="font-family:Arial,Helvetica,Geneva,sans-serif;font
-size:10pt;font-weight:normal;color:#000000">From: &SENDER
<P>Question: <B>&QUESTION</B>
<P><B>Please click on the following link to respond to this reques
t for more information</B>
<P>&CLICK_HERE_RESPONSE
<P><B>Notification Detail:</B></SPAN>
<P>&HEADER
<P>&BODY
<BR>
<SPAN style="font-family:Arial,Helvetica,Geneva,sans-serif;font-si
ze:10pt;font-weight:normal;color:#000000">Question:
<B>&QUESTION</B>
<P><B>Please click on the following link to respond to this reques
t for more information</B>
<P>&CLICK_HERE_RESPONSE </SPAN>
<P>&HISTORY
</BODY>
</HTML>

```

### **Workflow Invalid Open Mail (More Information Request) Message:**

The Workflow Invalid Open Mail (More Information Request) message is sent to a user by default when a user responds incorrectly to a request for more information. For example, if an answering message from a user contains a valid notification ID (NID) line matching it with a request for more information about a notification, but does not contain any response value, the notification mailer sends a Workflow Invalid Open Mail (More Information Request) message to the user. This message describes how to respond to the request for information correctly.

The Workflow Invalid Open Mail (More Information Request) message has the following message attributes. The values are drawn from the message definition associated with a notification activity.

#### **DUE\_DATE**

The date by which a response is required, specified in the notification activity.

#### **BODY**

The text of the body defined in the message.

#### **SUBJECT**

The subject line defined in the message.

**COMMENT**

Comments added by the sender or the forwarder.

**SENDER**

The name of the sender of the message, as displayed in the From column in the Worklist.

**HISTORY**

The history of actions on the notification.

**QUESTION**

Details about what information is being requested.

**RESPONSE**

The user response section.

**NOTIFICATION**

Required notification code used to identify the information in the notification.

**HEADER**

Standard header attributes and any custom header attributes defined to hold key information for the message. See: Header Attributes, *Oracle Workflow Developer's Guide*.

**MAIL\_EXP\_VALUES**

Information about the expected valid response values.

**MAIL\_VALUE\_FOUND**

The invalid response value found in the user's response message.

**MAIL\_ERROR\_  
MESSAGE**

An error message that the mail program generates if an error occurs upon processing the response.

You can customize the boilerplate text that appears in the body of the Workflow Invalid Open Mail (More Information Request) message, where attributes preceded by an ampersand (&) are token substituted with runtime values when the notification is sent.

The boilerplate text for a plain text message body is as follows:



## Oracle Workflow Notification

Warning: Your previous response to this message was invalid (see error message below). Please resubmit your response.

Important: Some mail clients, notably early releases of Microsoft Outlook Express, may not copy the 'NID' line properly in your response. Please verify that the 'NID' line is included in full and contains the prefix 'NID' and all the details between the square brackets when responding.

Error Message: &MAIL\_ERROR\_MESSAGE

Value Found: &MAIL\_VALUE\_FOUND

Remarks: &MAIL\_EXP\_VALUES

\_\_\_\_\_ Start of Response Template \_\_\_\_\_

More Information Template for &NOTIFICATION

User &SENDER has requested more information for the notification. Please reply to this message, including this response template with your reply. Copy and paste from this message if necessary to obtain an editable copy of the template. Insert your comments between the quotes against the prompt.

Question: &QUESTION

&RESPONSE

\_\_\_\_\_ End of Response Template \_\_\_\_\_

Notification Details:

&HEADER

&BODY

Due Date: &DUE\_DATE

&HISTORY

The boilerplate text for an HTML-formatted message body is as follows:

```

<html><Head><STYLE>
<!--
A:link {font-family:Arial,Helvetica,Geneva,sans-serif;font-size:10
pt;color:#663300}
A:active {font-family:Arial,Helvetica,Geneva,sans-serif;font-size:
10pt;color:#ff6600}
A:visited {font-family:Arial,Helvetica,Geneva,sans-serif;font-size
:10pt;color:#996633}
--> </STYLE></Head>
<body><SPAN style="font-family:Arial,Helvetica,Geneva,sans-serif;font-size:10pt;font-weight:normal;color:#336699">&TIMEZONE
</SPAN>
<p><SPAN style="font-family:Arial,Helvetica,Geneva,sans-serif;font-size:10pt;font-weight:normal;color:#000000">Warning: Your previous response to this message was invalid (see error message below).
Please resubmit your response.
<P>Error Message: &MAIL_ERROR_MESSAGE
<BR>
<BR>Value Found: &MAIL_VALUE_FOUND
<BR>
<BR>Remarks: &MAIL_EXP_VALUES
<HR><P>Question: <B>&QUESTION</B>
<P><B>Please click on the following link to automatically generate
an E-mail response for this question. Before sending the E-mail
response, ensure desired comments within quotes.</B>
<P>&MAILTO
<P>&HEADER
<P>&BODY
<P><B>Please click on one of the following choices to automatically
generate an E-mail response. Before sending the E-mail response
to close this notification, ensure all response prompts include a
desired response value within quotes.</B>
<P><B>Important:</B> Some mail clients, notably early releases of
Microsoft Outlook Express, may not copy the 'NID' line properly in
your response. Please verify that the 'NID' line is included in full
and contains the prefix 'NID' and all the details between the
square brackets when responding.
<P>Question: <B>&QUESTION</B>
<P><B>Please click on the following link to automatically generate
an E-mail response for this question. Before sending the E-mail
response, ensure desired comments within quotes.</B>
<P>&MAILTO</SPAN>
<P>&HISTORY
</BODY> </HTML>

```

## Step 10: Adding Worklist Functions to User Responsibilities

If you are using the version of Oracle Workflow embedded in Oracle Applications, you can optionally give users access to the Advanced Worklist and Personal Worklist Web pages from any responsibility you choose. To make a Worklist available from a particular responsibility, you must add the appropriate function to the menu associated with that responsibility. Then you can assign that responsibility to your users. See: Overview of Function Security, *Oracle Applications System Administrator's Guide* and Overview of Menus and Function Security, *Oracle Applications Developer's Guide*.

The following table shows the functions that correspond to each version of the Worklist.

### ***Worklist Functions***

<b>Function</b>	<b>User Function Name</b>	<b>Description</b>
WF_WORKLIST	Advanced Workflow Worklist	Advanced Workflow worklist based on the Oracle Applications Framework
WF_WORKLIST_CUSTOM	Personal Worklist	Advanced Workflow worklist based on the Oracle Applications Framework, with options to personalize search and display

The Advanced Worklist is seeded on the menu for the Workflow User Web Applications responsibility by default. You can also add this function to other responsibilities from which you want users to access notifications.

The Personal Worklist is an optional feature that is not seeded on any Oracle Applications menu. If you want users to access this version of the Worklist, you must first add the Personal Worklist function to the menu for a responsibility assigned to those users.

## **Related Topics**

To View Notifications from the Advanced Worklist, *Oracle Workflow User's Guide*

To View Notifications from the Personal Worklist, *Oracle Workflow User's Guide*

## **Step 11: Setting the WF: Notification Reassign Mode Profile Option**

In Oracle Applications, you can use the WF: Notification Reassign Mode profile option to control which reassign modes are available to users. Oracle Workflow provides the following reassign modes.

- Delegate - This mode lets users give another user authority to respond to a notification on their behalf, while still retaining ownership of the notification themselves. For example, a manager might delegate all vacation scheduling approvals to an assistant.
- Transfer - This mode lets users give another user complete ownership of and responsibility for a notification. For example, users might select this option if they should not have received a certain notification and they 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.

You can specify which reassign modes users can select by setting the WF: Notification Reassign Mode profile option to one of the following values.

- Reassign - This setting provides users access to both the Delegate and Transfer reassign modes. With this setting, the Advanced Worklist, the Personal Worklist, and the Response section of the Notification Details page display a Reassign button. Users can select this button to navigate to a Reassign page that lets them choose to either delegate or transfer the notification to another user. The Reassign setting is the default value for the WF: Notification Reassign Mode profile option.

- **Delegate** - This setting provides users access only to the Delegate reassign mode. With this setting, the Advanced Worklist, the Personal Worklist, and the Response section of the Notification Details page display a Delegate button in place of the Reassign button. Users can select the Delegate button to navigate to a Reassign page that only lets them delegate the notification to another user.
- **Transfer** - This setting provides users access only to the Transfer reassign mode. With this setting, the Advanced Worklist, the Personal Worklist, and the Response section of the Notification Details page display a Transfer button in place of the Reassign button. Users can select the Transfer button to navigate to a Reassign page that only lets them transfer the notification to another user.

You can set the WF: Notification Reassign Mode profile option in the System Profile Values window. This profile option can be set at site, application, responsibility, and user levels. The internal name for this profile option is `FND_NTF_REASSIGN_MODE`.

## Related Topics

Overview of Setting User Profiles, *Oracle Applications System Administrator's Guide*

To View Notifications from the Advanced Worklist, *Oracle Workflow User's Guide*

To View Notifications from the Personal Worklist, *Oracle Workflow User's Guide*

To View the Details of a Notification, *Oracle Workflow User's Guide*

To Reassign a Notification to Another User, *Oracle Workflow User's Guide*

## Step 12: Setting Up Vacation Rule Options

Vacation rules handle notifications automatically when users are not available to manage their notifications personally. These rules are defined according to the item type with which notifications are associated. In Oracle Applications, you can control what item types are available for vacation rules using the WF: Routing Rule Item Types lookup type and the WF: Vacation Rules - Allow All profile option.

### Adding Item Types for Vacation Rules:

By default, the list of item types a user can select when creating a vacation rule displays those item types for which the user has previously received at least one notification. You can also choose to add item types that you want to appear in the list for all users. In this way you can allow users to create rules to handle any notifications they may receive from those item types in the future.

To add an item type to the list, define the internal name of the item type as a lookup code for the WF: Routing Rule Item Types lookup type.

1. Navigate to the Application Object Library Lookups window in the Application Developer responsibility.
2. Query the `WF_RR_ITEM_TYPES` lookup type with the meaning `WF: Routing Rule Item Types` in the Application Object Library application.
3. Define the item type you want as a new lookup code for this lookup type. Ensure that you enter the item type internal name in the Code field exactly as the name is defined in your database. See: Application Utilities Lookups and Application Object Library Lookups, *Oracle Applications online help*.

### **Allowing Vacation Rules that Apply to All Item Types:**

Use the WF: Vacation Rules - Allow All profile option to determine whether the list of item types for vacation rules includes the "All" option. The "All" option lets users create a generic rule that applies to notifications associated with any item type.

Set the profile option to Enabled if you want the "All" option to appear in the list of item types for vacation rules, or to Disabled if you do not want the "All" option to appear. If you choose Disabled, then users must always specify the item type to which a vacation rule applies. The WF: Vacation Rules - Allow All profile option must be set at site level. The default value is Enabled. See: *Overview of Setting User Profiles, Oracle Applications System Administrator's Guide*.

After changing the value of this profile option, you must stop and restart Oracle HTTP Server for the change to take effect.

## **Related Topics**

Defining Vacation Rules for Users, page 4-5

Vacation Rules, *Oracle Workflow User's Guide*

## **Step 13: Setting Up for Electronic Signatures**

In Oracle Applications, notifications can require that a user's response be signed by a password-based signature or a certificate-based digital signature. Perform the following setup steps to enable users to provide these signatures.

**Note:** Electronic signatures are currently supported only for the version of Oracle Workflow embedded in Oracle Applications.

See: #WF\_SIG\_POLICY Attribute, *Oracle Workflow Developer's Guide*.

### **Implementing Password-based Signatures with Single Sign-On:**

Oracle Workflow supports password-based signatures for notifications based on Oracle Application Object Library (FND) passwords. If you maintain your directory service based on Oracle Application Object Library users and passwords, no additional setup is required. However, if you have implemented single sign-on functionality for your site through Oracle Internet Directory, and you want to use password-based signatures, you must perform the following steps.

1. Set the Applications SSO Login Types profile option to either Local or Both at user level for all users who need to enter password-based signatures.
2. Ensure that these users have valid passwords defined in Oracle Application Object Library. See: *Managing Oracle Applications Security, Oracle Applications System Administrator's Guide*.

For more information, see: *Integrating Oracle E-Business Suite Release 11i with Oracle Internet Directory and Oracle Single Sign-On (OracleMetaLink note 261914.1)*.

### **Loading Certificates for Digital Signatures:**

If a notification requires a certificate-based digital signature, the user must sign the response with a valid X.509 certificate issued by a certificate authority. Before users can sign responses with their certificates, you must load these certificates into your Oracle Applications database using the Workflow Certificate Loader.

When you load a certificate, you must also specify the Oracle Applications user to whom that certificate is assigned. Oracle Workflow uses this information to validate that the user attempting to sign with a certain certificate is the same user to whom that certificate is assigned.

A user can have more than one certificate assigned to him or her. However, each certificate can only be assigned to one user. Additionally, after you have loaded a certificate for a user, you cannot delete it from the database or assign it to a different user. If a certificate is incorrectly assigned, the user to whom it belongs must revoke it and obtain a new certificate instead.

You can load several certificates at once by listing the information for all the certificates in a data file for the loader. You can also load a single certificate by specifying the certificate information in the command line for the loader.

**Note:** If your users access Oracle Applications with Microsoft Internet Explorer, ensure that you also set the Browser Signing DLL Location global preference in the Workflow Configuration page. See: To Set Global Preferences for Oracle Workflow Embedded in Oracle Applications, page 2-15.

1. For each certificate, obtain the following information:
  - The Oracle Applications user name of the user to whom the certificate belongs.
  - The personal certificate itself, in the DER encoded binary X.509 format. The certificate should be provided as a file with an extension of `.cer`.
  - The root certificate of the certificate authority that issued the personal certificate, as well as any intermediate certificates required for this type of personal certificate.
  - A URL for each root and intermediate certificate, specifying the location from which the corresponding Certificate Revocation List (CRL) can be downloaded.

**Note:** You only need to load the root certificate for a particular certificate authority, and the intermediate certificates for a particular type of certificate, once. If you already loaded the root and intermediate certificates required for a new personal certificate, you can simply load the personal certificate without reloading the others.

2. If you want to load several certificates at once, create a data file for the Workflow Certificate Loader that specifies the location of the certificates to be loaded and the users to whom they belong. The data file should be a text file containing one entry for each root, intermediate, or personal certificate to be loaded.

All certificate entries in the file must appear in the order of the certification path, beginning with the root certificate for the certificate authority, followed by any intermediate certificates and then by the personal certificate. However, if the root or intermediate certificates required for a particular personal certificate were loaded previously, you do not need to reload them.

Each certificate entry must be a single line. For a root or intermediate certificate, use the following format:

```
user=CA; domain=CA; filename=<certificate_file>; crl_url=<URL>
```

where *<certificate\_file>* is the full path and file name specifying the location of the certificate file, and *<URL>* is the location from which the corresponding Certificate Revocation List (CRL) can be downloaded.

For a personal certificate, use the following format:

```
user=<user_name>; domain=U; filename=<certificate_file>
```

where *<user\_name>* is the Oracle Applications user name of the user to whom the certificate belongs, and *<certificate\_file>* is the full path and file name specifying the location of the certificate file.

You can also include comments in the data file. Start each comment line with a number sign (#).

The following example shows a sample data file. Note that although the lines may appear to wrap in this document, each certificate entry is a single line in the data file.

```
#Root certificate for certificate authority myCA
user=CA; domain=CA; filename=/certs/myCA.cer;
crl_url=http://myCA.com/myCA.crl
#
#Personal certificate for user BLEWIS
user=BLEWIS; domain=U; filename=/certs/blewis.cer
```

3. To load several certificates at once using a data file, run the Workflow Certificate Loader with the following command:

```
java oracle.apps.fnd.wf.DigitalSignature.loader.CertificateLoader

[-v] <user_name> <password> <connect_string> <data_file>
```

You can optionally specify the *-v* option to run the Workflow Certificate Loader in verbose mode, displaying additional diagnostic information in the output.

Replace the variables with your parameters as follows:

- *<user\_name>* - The user name of your Oracle Applications database account.
- *<password>* - The password for your Oracle Applications database account.
- *<connect\_string>* - The connect string for the database, including the host name, TNS port number, and database system identifier (SID) in the following format:  
*<host\_name>:<port\_number>:<database\_SID>*
- *<data\_file>* - The full path and file name specifying the location of the data file you created in the previous step.

For example:

```
java oracle.apps.fnd.wf.DigitalSignature.loader.CertificateLoader

-v apps apps myserv:4105:mySID myCertData.txt
```

4. To load a single certificate without using a data file, run the Workflow Certificate Loader specifying the certificate information in the command line. For a root or intermediate certificate, use the following command:

```
java oracle.apps.fnd.wf.DigitalSignature.loader.CertificateLoader

[-v] -s <user_name> <password> <connect_string> user=CA
domain=CA filename=<certificate_file> crl_url=<URL>
```

For a personal certificate, use the following command:

```
java oracle.apps.fnd.wf.DigitalSignature.loader.CertificateLoader

[-v] -s <user_name> <password> <connect_string> user=<user_name>
domain=U filename=<certificate_file>
```

You can optionally specify the `-v` option to run the Workflow Certificate Loader in verbose mode, displaying additional diagnostic information in the output.

Replace the variables with your parameters as follows:

- `<user_name>` - The user name of your Oracle Applications database account.
- `<password>` - The password for your Oracle Applications database account.
- `<connect_string>` - The connect string for the database, including the host name, TNS port number, and database system identifier (SID) in the following format:  
`<host_name>:<port_number>:<database_SID>`
- `<user_name>` - The Oracle Applications user name of the user to whom the personal certificate belongs.
- `<certificate_file>` - The full path and file name specifying the location of the certificate file.
- `<URL>` - The location from which the corresponding Certificate Revocation List (CRL) for the root or intermediate certificate can be downloaded.

For example:

```
java oracle.apps.fnd.wf.DigitalSignature.loader.CertificateLoader

-s apps apps myserv:4105:mySID user=BLEWIS domain=U
filename=/certs/blewis.cer
```

**Note:** You can display a help message describing the usage of the Workflow Certificate Loader by specifying the `-h` option with the following command:

```
java
oracle.apps.fnd.wf.DigitalSignature.loader.CertificateLoader
-h
```

### Troubleshooting the Workflow Certificate Loader

The following list shows Workflow Certificate Loader error messages and suggested steps to resolve them.

- **No parent certificate found for certificate** - The loader could not locate the root or intermediate certificate that should precede the current certificate in the certificate path. Ensure that either the parent certificate is already loaded to the



database, or a valid entry for the parent certificate appears before the entry for the current certificate in the data file.

- **Unable to create certificate object from file** - The data in the certificate file may be corrupted. Check that the certificate is valid by double-clicking the certificate file and viewing its status. Also, ensure that the certificate is stored in the DER encoded binary X.509 format.
- **FND USER does not exist** - The user name specified in a certificate entry in the data file is not defined as an Oracle Applications user. Ensure that the user name is specified as either CA for a certificate authority or a valid Oracle Applications user name for an individual user.
- **Certificate already associated with another user** - The certificate has already been loaded to the database and assigned to a different user. If a certificate is incorrectly assigned, the user to whom it belongs must revoke it and obtain a new certificate instead.
- **Certdatafile not in proper format** - The data file for the loader does not follow the required format. Ensure that the data file contains only certificate entries and comments, each certificate entry is a single line containing the appropriate arguments, and each comment line begins with a number sign (#).
- **The Network Adapter could not establish the connection** - The loader was unable to connect to the database using the specified parameters. Ensure that you specify the correct database user name, password, and connect string when you run the loader.
- **Illegal Argument Exception** - The loader could not process the parameters provided in the run command. Ensure that you specify the loader parameters in the required format.

## Step 14: Customizing the Logo on Oracle Workflow's Web Pages

After Oracle HTTP Server is installed and configured for your Oracle Workflow instance, you can customize the company logo that appears in the upper right corner of Oracle Workflow's Web pages.

### To Customize Oracle Workflow's Web Pages:

1. Copy or rename your company logo file (in .gif format) to FNDLOGOS.gif if you are using Oracle Workflow embedded in Oracle Applications or WFLOGO.gif if you are using the standalone version of Oracle Workflow.
2. Move the file to the physical directory that your Web server's /OA\_MEDIA/ virtual directory points to.

**Note:** If you are using Oracle Workflow embedded in Oracle Applications, the mapping of /OA\_MEDIA/ is completed as part of the Oracle Applications installation and setup steps.

If you are using the standalone version of Oracle Workflow, the mapping of /OA\_MEDIA/ is completed after you install Oracle Workflow, during configuration of the Oracle Workflow middle tier components.

For more information, see the installation documentation for your release.

## Step 15: Adding Custom Icons to Oracle Workflow

Oracle Workflow Builder looks for icons in the `ICON` subdirectory of the Oracle Workflow area on your PC. The `ICON` subdirectory is defined in the registry of Oracle Workflow Builder. The Oracle Workflow area is typically the `wf` subdirectory within your Oracle home.

Oracle Workflow provides a variety of icons that you can use to represent your activities and processes. You can add custom icon files to this area as long as they are Windows icon files with the `.ico` suffix.

If you want the custom icons that you include in your Oracle Workflow Builder process definition to appear in the Workflow Monitor when you view the process diagram, perform the following steps.

1. Convert the custom icon files (`.ico`) to `gif` format (`.gif`).
2. Copy the `.gif` files to the physical directory that your Web server's `/OA_MEDIA/` virtual directory points to, so that the Workflow Monitor can access them.

**Note:** If you are using Oracle Workflow embedded in Oracle Applications, the mapping of `/OA_MEDIA/` is completed as part of the Oracle Applications installation and setup steps.

If you are using the standalone version of Oracle Workflow, the mapping of `/OA_MEDIA/` is completed after you install Oracle Workflow, during configuration of the Oracle Workflow middle tier components.

For more information, see the installation documentation for your release.

## Step 16: Setting Up the Java Function Activity Agent

To execute external Java function activities, you must set up the Java Function Activity Agent. This functionality is currently only available for the standalone version of Oracle Workflow. The Java Function Activity Agent dequeues the messages related to external Java activities from the 'Outbound' queue for external function processing, calls the appropriate Java functions, and places the results on the 'Inbound' queue for external function processing.

**Note:** These 'Outbound' and 'Inbound' queues are separate from the queues used for the Business Event System. See: *Setting Up Background Workflow Engines*, page 2-50 and *Workflow Queue APIs*, *Oracle Workflow API Reference*.

After a Java function completes, you must run a background engine to process the 'Inbound' queue and complete the function activity. See: *Setting Up Background Engines*, page 2-50.

Some standard Workflow activities are external Java function activities and require the Java Function Activity Agent. You can also define your own external Java function activities. See: *Standard Activities*, *Oracle Workflow Developer's Guide*, *To Create a Function Activity*, *Oracle Workflow Developer's Guide*, and *Standard API for Java Procedures Called by Function Activities*, *Oracle Workflow Developer's Guide*.

To run the Java Function Activity Agent, you must have Java Development Kit (JDK) Version 1.4 installed.

**Note:** The Java Runtime Environment is available for download from: <http://www.javasoft.com>

### Starting the Java Function Activity Agent:

If you are using the standalone version of Oracle Workflow, you can run scripts provided by Oracle Workflow to start the Java Function Activity agent. You can also start the agent manually.

When you start the Java Function Activity Agent, you must specify the user name of your Oracle Workflow database account and the database connect string. You can also optionally specify the character set and the JDBC driver type that you want to use.

After starting, the Java Function Activity Agent prompts you to enter the password for your Oracle Workflow database account.

You use different commands to start the agent depending on whether you are running it from a script or manually, and which platform you are running it on.

#### Starting the Java Function Activity Agent From a Script

You can run scripts called `wfjvlsnr.csh` or `wfjvlsnr.bat` to start the Java Function Activity Agent on UNIX or on Windows, respectively. These scripts are located on your server in the `ORACLE_HOME/wf/admin` directory.

If you define your own external Java function activities, you must edit the scripts to include the path to the JAR files containing your custom Java classes. The custom class files should reside on the same platform where the Java Function Activity Agent is run. The Java Function Activity Agent does not need to reside on the same tier as the database, however.

#### Running the `wfjvlsnr.csh` Script on UNIX

Use the following command to run the `wfjvlsnr.csh` script on UNIX:

```
wfjvlsnr.csh "<user_name> <connect_string>  
[<JDBC_driver>]" [<character_set>]
```

Replace the parameters in the command as follows:

- `<user_name>` - The user name of your Oracle Workflow database account.
- `<connect_string>` - The connect string for the database. The format of the connect string depends on the JDBC driver type.
  - For a JDBC OCI8 driver, the connect string should be the database name as specified in its TNSNAMES entry, in the following format:  
`<database_name>`
  - For a JDBC THIN driver, you can use two different types of connect string. For the first type, the connect string should include the host name, port number, and database system identifier (SID) in the following format:

```
<host_name>:<port_number>:<database_SID>
```

For the second type, the connect string should include an Oracle Net name-value pair with the host name, protocol, port number, and SID in the following format:

```
(description=(address=(host=<host_name>)
(protocol=<protocol>) (port=<port_number>))
(connect_data=(sid=<database_SID>)))
```

- *<JDBC\_driver>* - The JDBC driver type you want to use to connect to the database. The JDBC driver type can be either `oci8` or `thin`. If you do not specify a driver type, Oracle Workflow uses the JDBC OCI8 driver by default.
- *<character\_set>* - The character set to use for the database session. If you do not specify a character set, Oracle Workflow uses UTF8 by default.

**Note:** The connection details, including the user name, connect string, and JDBC driver type, must be enclosed in double quotes to separate them from the character set parameter.

### Running the wfjvlsnr.bat Script on Windows

Use the following command to run the `wfjvlsnr.bat` script on Windows:

```
wfjvlsnr.bat "<user_name> <connect_string>
[<JDBC_driver>]" [<character_set>]
```

Replace the parameters in the command as follows:

- *<user\_name>* - The user name of your Oracle Workflow database account.
- *<connect\_string>* - The connect string for the database. The format of the connect string depends on the JDBC driver type.

- For a JDBC OCI8 driver, the connect string should be the database name as specified in its TNSNAMES entry, in the following format:

```
<database_name>
```

- For a JDBC THIN driver, you can use two different types of connect string. For the first type, the connect string should include the host name, port number, and database system identifier (SID) in the following format:

```
<host_name>:<port_number>:<database_SID>
```

For the second type, the connect string should include an Oracle Net name-value pair with the host name, protocol, port number, and SID in the following format:

```
(description=(address=(host=<host_name>)
(protocol=<protocol>) (port=<port_number>))
(connect_data=(sid=<database_SID>)))
```

- *<JDBC\_driver>* - The JDBC driver type you want to use to connect to the database. The JDBC driver type can be either `oci8` or `thin`. If you do not specify a driver type, Oracle Workflow uses the JDBC OCI8 driver by default.
- *<character\_set>* - The character set to use for the database session. If you do not specify a character set, Oracle Workflow uses UTF8 by default.

**Note:** The connection details, including the user name, connect string, and JDBC driver type, must be enclosed in double quotes to separate them from the character set parameter.

### Starting the Java Function Activity Agent Manually

To start the Java Function Activity Agent manually, run JRE against `oracle.apps.fnd.wf.WFFALsnr`, specifying your CLASSPATH, the user name of your Oracle Workflow database account, and the database connect string. You can also optionally specify the character set and the JDBC driver type that you want to use.

The CLASSPATH must point to the Java Runtime Environment, the directory containing the Workflow JAR files, the Oracle XML parser, the Oracle JDBC implementation, and the following Workflow JAR files:

- `wfjava.jar` - The Java Function Activity Agent.
- `wfapi.jar` - Workflow Java APIs.
- The Share JAR file - Utilities referenced by the Workflow Java APIs. In standalone Oracle Workflow, this file is named `share-<version>.jar`, such as `share-1_1_9.jar`, or whichever version is current.
- The Ewt JAR file - Utilities referenced by the Workflow Java APIs. In standalone Oracle Workflow, this file is named `ewt-<version>.jar`, such as `ewt-3_3_18.jar`, or whichever version is current.
- The Swing JAR file - Optional additional utilities. In standalone Oracle Workflow, this file is named `swingall-<version>.jar`, such as `swingall-1_1_1.jar`, or whichever version is current.
- `fndctx.jar` - Utilities referenced by the Workflow Java APIs.

**Note:** In standalone Oracle Workflow, the Workflow JAR files are located in the `ORACLE_HOME/jlib` directory.

If you define your own external Java function activities, you must also include the JAR files containing your custom Java classes in the CLASSPATH. The custom class files should reside on the same platform where the Java Function Activity Agent is run. The Java Function Activity Agent does not need to reside on the same tier as the database, however.

### Starting the Java Function Activity Agent on UNIX

Use the following command to start the Java Function Activity Agent on UNIX:

```
jre -classpath "$JREPATH/rt.jar:$<Workflow_JAR_file_directory>:  
$<Workflow_JAR_file_directory>/wfjava.jar:$<ORACLE_HOME>/wf/  
xml/java/lib/xmlparserv2.jar:$<Workflow_JAR_file_directory>/  
wfapi.jar:$<ORACLE_HOME>/jdbc/lib/classes111.zip:  
$<Workflow_JAR_file_directory>/<Share_JAR_file>:  
$<Workflow_JAR_file_directory>/<Ewt_JAR_file>:  
$<Workflow_JAR_file_directory>/<Swing_JAR_file>:  
$<Workflow_JAR_file_directory>/fndctx.jar:"  
[-DCHARSET=<character_set>] oracle.apps.fnd.wf.WFFALsnr  
<user_name> <connect_string> [<JDBC_driver>]
```

In this command, you can optionally use the `-DCHARSET` option to specify the character set that you want to use. If you do not specify a character set, Oracle Workflow uses UTF8 by default.

Replace the parameters in the command as follows:

- `<character_set>` - The character set to use for the database session.
- `<user_name>` - The user name of your Oracle Workflow database account.
- `<connect_string>` - The connect string for the database. The format of the connect string depends on the JDBC driver type.
  - For a JDBC OCI8 driver, the connect string should be the database name as specified in its TNSNAMES entry, in the following format:

```
<database_name>
```

- For a JDBC THIN driver, you can use two different types of connect string. For the first type, the connect string should include the host name, port number, and database system identifier (SID) in the following format:

```
<host_name>:<port_number>:<database_SID>
```

For the second type, the connect string should include an Oracle Net name-value pair with the host name, protocol, port number, and SID in the following format:

```
(description=(address=(host=<host_name>)
(protocol=<protocol>) (port=<port_number>))
(connect_data=(sid=<database_SID>)))
```

- `<JDBC_driver>` - The JDBC driver type you want to use to connect to the database. The JDBC driver type can be either `oci8` or `thin`. If you do not specify a driver type, Oracle Workflow uses the JDBC OCI8 driver by default.

### Starting the Java Function Activity Agent on Windows

Use the following command to start the Java Function Activity Agent on Windows:

```
jre -classpath ";<JREPATH>\rt.jar;<Workflow_JAR_file_directory>;
<Workflow_JAR_file_directory>\wfjava.jar;<ORACLE_HOME>\wf\
xml\java\lib\xmlparserv2.jar;<Workflow_JAR_file_directory>\
wfapi.jar;<ORACLE_HOME>\jdbc\lib\classes111.zip;
<Workflow_JAR_file_directory>\<Share_JAR_file>;
<Workflow_JAR_file_directory>\<Ewt_JAR_file>;
<Workflow_JAR_file_directory>\<Swing_JAR_file>;
<Workflow_JAR_file_directory>\fndctx.jar;"
-nojit [-DCHARSET=<character_set>] oracle.apps.fnd.wf.WFFALsnr
<user_name> <connect_string> [<JDBC_driver>]
```

In this command, you can optionally use the `-DCHARSET` option to specify the character set that you want to use. If you do not specify a character set, Oracle Workflow uses UTF8 by default.

Replace the parameters in the command as follows:

- `<character_set>` - The character set to use for the database session.

- `<user_name>` - The user name of your Oracle Workflow database account.
- `<connect_string>` - The connect string for the database. The format of the connect string depends on the JDBC driver type.
  - For a JDBC OCI8 driver, the connect string should be the database name as specified in its TNSNAMES entry, in the following format:

```
<database_name>
```

- For a JDBC THIN driver, you can use two different types of connect string. For the first type, the connect string should include the host name, port number, and database system identifier (SID) in the following format:

```
<host_name>:<port_number>:<database_SID>
```

For the second type, the connect string should include an Oracle Net name-value pair with the host name, protocol, port number, and SID in the following format:

```
(description=(address=(host=<host_name>)
(protocol=<protocol>) (port=<port_number>))
(connect_data=(sid=<database_SID>)))
```

- `<JDBC_driver>` - The JDBC driver type you want to use to connect to the database. The JDBC driver type can be either `oci8` or `thin`. If you do not specify a driver type, Oracle Workflow uses the JDBC OCI8 driver by default.

### Stopping the Java Function Activity Agent:

Normally, the Java Function Activity Agent runs as a perpetual job. However, you can stop the agent by running a script called `wfjvstop.sql`, located in the `ORACLE_HOME/wf/admin/sql` directory. This script places a stop message on the 'Outbound' queue. See: `wfjvstop.sql`, page 7-8.

**Note:** If you are running more than one Java Function Activity Agent simultaneously, you must run the `wfjvstop.sql` script once for each Java Function Activity Agent.

## Step 17: Setting Up the Business Event System

The Business Event System is an application service delivered with Oracle Workflow that uses Oracle Advanced Queuing (AQ) to communicate business events between systems. You need to perform this step to use event processing. See: Overview of the Oracle Workflow Business Event System, *Oracle Workflow API Reference* and Managing Business Events, *Oracle Workflow Developer's Guide*.

To set up the Business Event System and enable message propagation, perform the following steps:

1. If you want to communicate business events between the local system and external systems, create database links to those external systems, page 2-146.
2. If you want to use custom queues for propagating events, set up your queues, page 2-147.
3. Check the Business Event System setup parameters, page 2-150.

4. Schedule listeners for local inbound agents, page 2-151.
5. Schedule propagation for local outbound agents, page 2-153.
6. If you are using the version of Oracle Workflow embedded in Oracle Applications, synchronize event and subscription license statuses with product license statuses, page 2-154.
7. Ensure that the WF\_CONTROL queue is periodically cleaned up to remove inactive subscribers, page 2-155.

You should recheck your setup whenever you make changes to your agents that affect the physical implementation required for propagation. See: *Agents, Oracle Workflow Developer's Guide*.

**Note:** Oracle Workflow sets the status of the local system to Enabled by default. After you finish setting up the Business Event System, you can update your global workflow preferences to set the system status that you want for event processing. See: *Setting Global User Preferences*, page 2-11.

### Creating Database Links:

To propagate event messages between systems, you must create database links from your local system to the remote systems. You should fully qualify the database link name with the domain name.

You can either create database links manually, or use Oracle DBA Studio in the Oracle Enterprise Manager to perform this step. Oracle DBA Studio allows workflow administrators to quickly and easily create and administer database links, queue tables, queues, and queue propagation without requiring knowledge of the SQL DDL commands. See: *DBA Management Pack, Oracle Enterprise Manager Administrator's Guide* or the Oracle Enterprise Manager online help.

You can use the following syntax to create a database link manually:

```
CREATE DATABASE LINK <database link name> CONNECT TO
    <user> IDENTIFIED BY <password> USING '<connect string>';
```

For example:

```
CREATE DATABASE LINK wf10g.us.oracle.com CONNECT TO
    wfuser IDENTIFIED BY welcome
    USING 'wf817';
```

If you have multiple installations of Oracle Workflow on both the local database and the remote database, and you want to use the same username and password to access both systems, you can omit the `<user> IDENTIFIED BY <password>` clause. In this case, the database link uses the username and password of the user who is connected to the database.

```
CREATE DATABASE LINK <database link name> CONNECT TO
    USING '<connect string>';
```

If you want to create a public database link available to all users, specify the parameter PUBLIC.



```
CREATE PUBLIC DATABASE LINK <database link name> CONNECT TO
  <user> IDENTIFIED BY <password>
  USING '<connect string>';
```

To verify the names of your database links, use the following syntax:

```
SELECT db_link FROM all_db_links;
```

See: CREATE DATABASE LINK, *Oracle SQL Reference*.

### **Setting Up Queues:**

The Business Event System uses Oracle Advanced Queuing (AQ) to communicate event messages between systems. You must associate a queue with each agent on a Workflow-enabled system that you define in the Event Manager.

When you install Oracle Workflow, several standard queues are created automatically for the standard Workflow agents. These queues all use either the standard WF\_EVENT\_T structure or JMS Text messages as their payload type. See: *Standard Agents, Oracle Workflow Developer's Guide*, *Event Message Structure, Oracle Workflow API Reference*, and *Mapping Between WF\_EVENT\_T and SYS.AQ\$\_JMS\_TEXT\_MESSAGE, Oracle Workflow API Reference*.

The following table lists the standard queues.

**Business Event System Queues**

Queue Table	Queue Name	Payload Type	Retention Time	Description
WF_CONTROL	WF_CONTROL	SYS.AQ\$_JMS_TEXT_MESSAGE	1 day	Oracle Workflow internal queue, not for customer use
WF_DEFERRED	WF_DEFERRED	WF_EVENT_T	1 day	Standard queue for deferred subscription processing in the database
WF_ERROR	WF_ERROR	WF_EVENT_T	0 days	Standard queue for error handling in the database
WF_IN	WF_IN	WF_EVENT_T	7 days	Default inbound queue
WF_JAVA_DEFERRED	WF_JAVA_DEFERRED	SYS.AQ\$_JMS_TEXT_MESSAGE	1 day	Standard queue for deferred subscription processing in the middle tier
WF_JAVA_ERROR	WF_JAVA_ERROR	SYS.AQ\$_JMS_TEXT_MESSAGE	0 days	Standard queue for error handling in the middle tier
WF_JMS_IN	WF_JMS_IN	SYS.AQ\$_JMS_TEXT_MESSAGE	7 days	Default inbound queue for JMS Text messages
WF_JMS_OUT	WF_JMS_OUT	SYS.AQ\$_JMS_TEXT_MESSAGE	7 days	Default outbound queue for JMS Text messages
WF_NOTIFICATION_IN	WF_NOTIFICATION_IN	SYS.AQ\$_JMS_TEXT_MESSAGE	1 day	Standard inbound queue for e-mail notification responses
WF_NOTIFICATION_OUT	WF_NOTIFICATION_OUT	SYS.AQ\$_JMS_TEXT_MESSAGE	1 day	Standard outbound queue for e-mail notifications
WF_OUT	WF_OUT	WF_EVENT_T	7 days	Default outbound queue
WF_WS_JMS_IN	WF_WS_JMS_IN	SYS.AQ\$_JMS_TEXT_MESSAGE	7 days	Default inbound queue for Web service messages
WF_WS_JMS_OUT	WF_WS_JMS_OUT	SYS.AQ\$_JMS_TEXT_MESSAGE	7 days	Default outbound queue for Web service messages

**Note:** Oracle Workflow also includes three queues named WF\_REPLAY\_IN, WF\_REPLAY\_OUT, and WF\_SMTP\_O\_1\_QUEUE, which are not currently used. The WF\_JAVA\_DEFERRED, WF\_JAVA\_ERROR, WF\_WS\_JMS\_IN, and WF\_WS\_JMS\_OUT queues are currently used only in Oracle Applications. Also, in Oracle Applications, Oracle XML Gateway provides additional standard queues.

Oracle Workflow includes three queues for background engine processing named WF\_DEFERRED\_QUEUE\_M, WF\_OUTBOUND\_QUEUE, and WF\_INBOUND\_QUEUE. These queues are separate from the Business Event System queues. See: *Setting Up Background Workflow Engines*, page 2-50.

If necessary, you can change the default retention time set for consumed messages on the standard Workflow queues, using the PL/SQL procedure DBMS\_AQADM.Alter\_Queue. You must not change any other part of the setup of these queues.

You can also set up your own queues for event message propagation. You can either set up queues manually, or use Oracle DBA Studio in the Oracle Enterprise Manager to perform this step. Oracle DBA Studio allows workflow administrators to quickly and easily create and administer database links, queue tables, queues, and queue propagation without requiring knowledge of the SQL DDL commands. See: *DBA Management Pack, Oracle Enterprise Manager Administrator's Guide* or the Oracle Enterprise Manager online help.

To set up a queue manually, you must create the queue table, create the queue, and start the queue. You should perform these tasks using a schema that is appropriate for the application for which you will use the queue. You must specify the schema that owns the queue as part of the queue name when you assign the queue to a Business Event System agent.

- To create a queue table, use the PL/SQL procedure DBMS\_AQADM.Create\_Queue\_Table. Use the following syntax:

```
DBMS_AQADM.Create_Queue_Table (  
    queue_table => '<queue table name>',  
    queue_payload_type => '<queue payload type>',  
    sort_list => 'PRIORITY,ENQ_TIME',  
    multiple_consumers => TRUE  
    compatible => '8.1');
```

For queues that should use the standard Workflow format, specify the queue payload type as WF\_EVENT\_T. These queues can use the standard queue handler provided with Oracle Workflow, WF\_EVENT\_QH. For queues that should use the JMS Text message format, specify the queue payload as \$AQ\_JMS\_TEXT\_MESSAGE. These queues can use the standard JMS queue handler provided with Oracle Workflow, WF\_EVENT\_OJMSTEXT\_QH. If you define a queue with a different payload type, you must create a queue handler to translate between the standard Workflow format and the format required by the queue. See: *Standard APIs for a Queue Handler, Oracle Workflow Developer's Guide*.

You can also use the storage\_clause parameter to specify the tablespace where you want to create the queue table. You may want to specify a tablespace if you expect a queue to be very large.

- To create a queue, use the PL/SQL procedure `DBMS_AQADM.Create_Queue`. Use the following syntax:

```
DBMS_AQADM.Create_Queue (
    queue_name => '<queue name>',
    queue_table => '<queue table name>');
```

**Note:** If you want other database users to enqueue messages onto or dequeue messages from your queue, you must grant those users the appropriate privileges using the PL/SQL procedure `DBMS_AQADM.Grant_Queue_Privilege`.

- To start a queue, use the PL/SQL procedure `DBMS_AQADM.Start_Queue`. Use the following syntax:

```
DBMS_AQADM.Start_Queue (
    queue_name => '<queue name>');
```

Oracle Workflow provides a sample script called `wfevqueec.sql` which you can modify to set up your queues, as well as a sample script called `wfevqued.sql` which you can modify to drop queues. These scripts are located on your server in the `ORACLE_HOME/wf/sql` directory for the standalone version of Oracle Workflow, or in the `$FND_TOP/sql` directory for the version of Oracle Workflow embedded in Oracle Applications.

You can verify that your queues are set up properly using the Oracle Workflow Manager component of Oracle Applications Manager or Oracle Enterprise Manager. See the Oracle Workflow Manager online help.

In Oracle Applications, you can also run a diagnostic test to verify your queues. See: Oracle Workflow Diagnostic Tests, page D-1.

**Note:** SQL\*Plus version 8.1.6 does not allow you to select the `USER_DATA` column from queue tables. You must have SQL\*Plus version 8.1.7 or higher, which allows you to select `USER_DATA`, if you want to be able to select the event message payload from your Workflow queues.

See: Administrative Interface, *Oracle Application Developer's Guide - Advanced Queuing* or Oracle Streams AQ Administrative Interface, *Oracle Streams Advanced Queuing User's Guide and Reference* and `DBMS_AQADM`, *Oracle Supplied PL/SQL Packages Reference* or `DBMS_AQADM`, *PL/SQL Packages and Types Reference*

### Checking the Business Event System Setup:

Use the Oracle Workflow Manager component of Oracle Applications Manager or Oracle Enterprise Manager to verify that the required parameters and components have been set up to enable message propagation for the Business Event System, including the required database initialization parameters. For more information, please refer to the Oracle Workflow Manager online help.

If you are using Oracle9i Database and higher, you can either modify the parameters in the `init.ora` file and restart the database, or you can use the `ALTER SYSTEM` statement to dynamically modify the parameters for the duration of the instance.

- **AQ\_TM\_PROCESSES** - This parameter enables the time manager process in Oracle Advanced Queuing (AQ). The time manager process is required by Oracle Workflow to monitor delay events in queues, as in the case of the Oracle Workflow standard Wait activity. The recommended number of time manager processes for Oracle Workflow is two or more.
- **JOB\_QUEUE\_PROCESSES** - This parameter defines the number of SNP job queue processes for your instance. Oracle Workflow requires job queue processes to handle propagation of Business Event System event messages by AQ queues. You must start at least one job queue process to enable message propagation. The minimum recommended number of processes for Oracle Workflow is ten.

**Note:** If you want to review more detailed information about AQ processing, you can optionally use another initialization parameter, **EVENT**, for detailed database level tracing of issues related to AQ. Add the following line to your `init.ora` file:

```
event = "24040 trace name context forever, level 10"
```

Then restart your database to make this change effective. Be aware that using this parameter may generate large trace files.

See: *Oracle Application Developer's Guide - Advanced Queuing* or *Oracle Streams Advanced Queuing User's Guide and Reference*.

### **Scheduling Listeners for Local Inbound Agents:**

To communicate events between different agents, you must schedule listeners for the inbound agents on your local system. The Business Event System requires listeners to be scheduled to receive inbound event messages. Run PL/SQL agent listeners to process event subscriptions with a PL/SQL rule function in the database. In Oracle Applications, you can also run Java agent listeners to process event subscriptions in the middle tier.

When you schedule a listener for an agent, it monitors the agent's queue, dequeuing any inbound event messages. When an event message is received, the Event Manager searches for and executes any enabled subscriptions by the local system to that event with a source type of External, and also any enabled subscriptions by the local system to the Any event with a source type of External. The listener exits after all event messages on the agent's queue have been dequeued.

The PL/SQL and Java agent listener programs are defined as service component types in the Generic Service Component Framework. This framework helps to simplify and automate the management of background Java services.

You can use Oracle Workflow Manager to submit and manage agent listener service components. You can also view the distribution of event messages on different agents, drill down to view details about individual event messages, and review queue details for the agents. Oracle Workflow Manager is available as a component of Oracle Applications Manager if you are using the version of Oracle Workflow embedded in Oracle Applications, or as a component of Oracle Enterprise Manager if you are using the standalone version of Oracle Workflow. For more information, please refer to the Oracle Applications Manager online help or the Oracle Enterprise Manager online help.

Oracle Workflow also provides an administrative script named `wfagtlst.sql` that you can use to run a PL/SQL agent listener. See `Wfagtlst.sql`, page 7-4.

Oracle Workflow provides seeded PL/SQL agent listener service components for the standard WF\_DEFERRED, WF\_ERROR, and WF\_NOTIFICATION\_IN agents. These agent listeners are named Workflow Deferred Agent Listener, Workflow Deferred Notification Agent Listener, Workflow Error Agent Listener, and Workflow Inbound Notifications Agent Listener, and they support deferred subscription processing in the database, dedicated deferred subscription processing for notification messages, error handling for the Business Event System in the database, and inbound e-mail processing for notification mailers, respectively.

In Oracle Applications, Oracle Workflow provides seeded Java agent listener service components for the standard WF\_JAVA\_DEFERRED, WF\_JAVA\_ERROR, and WF\_WS\_JMS\_IN agents. These agent listeners are named Workflow Java Deferred Agent Listener, Workflow Java Error Agent Listener, and Web Services IN Agent, and they support deferred subscription processing in the middle tier, error handling for the Business Event System in the middle tier, and inbound Web service message processing, respectively.

In Oracle Applications, Oracle XML Gateway also provides two seeded PL/SQL agent listener service components for the standard ECX\_INBOUND and ECX\_TRANSACTION agents. These agent listeners are named ECX Inbound Agent Listener and ECX Transaction Agent Listener, respectively. For more information, see *Monitor Workflow Processes*, *Oracle XML Gateway User's Guide*.

You can also optionally create additional agent listener service components. For example, you can configure agent listeners for other inbound agents that you want to use for event message propagation, such as the standard WF\_IN and WF\_JMS\_IN agents, or any custom agents. You can also configure an agent listener service component that only processes messages on a particular agent that are instances of a specific event.

Service components must be hosted by a service component container. If you create custom agent listener service components, you can assign them to the seeded container for agent listeners.

- In Oracle Applications, a service component container is implemented as a Generic Service Management (GSM) service. The seeded container for agent listeners is named `Workflow Agent Listener Service`.
- In standalone Oracle Workflow, a service component container is implemented as a servlet within an OC4J instance. The seeded container for agent listeners is named `WFALSNRSVC`, within an OC4J instance named `OC4J_Workflow_Component_Container`.

In Oracle Applications only, based on the volume to be handled by the seeded container, you can also choose to create your own custom containers as GSM services in Oracle Applications Manager. If you create a custom GSM service in OAM, you can copy the service parameters from the seeded `Workflow Agent Listener Service` to your new service in order to specify how to run the new service.

Before agent listener service components can run, the container which manages them must first be started. In order to run the seeded agent listeners, you should ensure that the `Workflow Agent Listener Service` container is running using Oracle Applications Manager for the version of Oracle Workflow embedded in Oracle Applications, or ensure that the `WFALSNRSVC` container is running using Oracle Enterprise Manager for the standalone version of Oracle Workflow. If you create your own custom containers in OAM for custom service components, ensure that those containers are running as well.

**Note:** In Oracle Applications, you can run a diagnostic test to verify the GSM services for Oracle Workflow. See: Oracle Workflow Diagnostic Tests, page D-1.

Additionally, in Oracle Applications, if the status of an agent listener service component changes to Stopped with Error or System Deactivated, Oracle Workflow posts a system alert to the System Alerts and Metrics page in Oracle Applications Manager. See: System Alerts, Metrics, and Logs, *Oracle Applications System Administrator's Guide - Maintenance*.

See: Agents, *Oracle Workflow Developer's Guide* and Listen, *Oracle Workflow API Reference*.

### **Exception Handling for Inbound Queues**

Oracle Streams Advanced Queuing (AQ) transfers event messages from an agent's normal queue to the associated exception queue in the following cases:

- A message expires before being dequeued.
- An agent listener repeatedly attempts to process a message but rolls back the transaction due to an error, and the number of attempts exceeds the queue's retry limit.

In Oracle Applications, you can run the Move Messages from Exception to Normal Queue of Workflow Agent concurrent program (FNDWF\_MOVE\_MSGS\_EXCEP2NORMAL) to transfer such messages back to the agent's normal queue. This program helps enable mass reprocessing in case of a large number of errors. Use Standard Request Submission to run the program, specifying the inbound agent for which you want to transfer messages back to the normal queue. After the program completes, run the appropriate agent listener to reattempt normal processing for these event messages. See: Running Reports and Programs, *Oracle Applications User's Guide* and Exception Handling, *Oracle Streams Advanced Queuing User's Guide and Reference*.

### **Scheduling Propagation for Local Outbound Agents:**

To communicate events between different agents, you must schedule propagation for the outbound agents on your local system. The Business Event System requires propagation to be scheduled to send outbound event messages.

When you send an event message to an agent, the Event Manager places the message on the queue associated with the outbound agent. The message is then asynchronously delivered to the inbound agent by propagation.

You can schedule AQ propagation for agents that use the SQLNET protocol by the following methods:

- Use the Distributed Database Management feature to manage AQ through Oracle Enterprise Manager. See: Oracle Enterprise Manager Support, *Oracle Application Developer's Guide - Advanced Queuing* or *Oracle Streams Advanced Queuing User's Guide and Reference*, and Distributed Management, *Oracle Enterprise Manager Administrator's Guide* or the Oracle Enterprise Manager online help.
- Run the DBMS\_AQADM.Schedule\_Propagation API in SQL\*Plus. See: DBMS\_AQADM, *PL/SQL Packages and Types Reference*.

If you want to use the standard WF\_OUT and WF\_JMS\_OUT agents or custom agents for event message propagation, ensure that you schedule

propagation for those agents. You do not need to schedule propagation for the WF\_CONTROL, WF\_NOTIFICATION\_OUT, or WF\_WS\_JMS\_OUT agents, however. The middle tier processes that use WF\_CONTROL dequeue messages directly from its queue, and notification mailers send messages placed on the WF\_NOTIFICATION\_OUT queue. For WF\_WS\_JMS\_OUT, you can optionally start a Web services outbound component named Web Services OUT Agent, provided by Oracle Workflow.

For agents that use protocols other than the SQLNET protocol, you must provide external propagation logic. See: Agents, *Oracle Workflow Developer's Guide*.

You can use Oracle Workflow Manager to review the propagation schedules for your local outbound agents. You can also view the distribution of event messages on different agents, drill down to view details about individual event messages, and review queue details for the agents. Oracle Workflow Manager is available as a component of Oracle Applications Manager if you are using the version of Oracle Workflow embedded in Oracle Applications, or as a component of Oracle Enterprise Manager if you are using the standalone version of Oracle Workflow. For more information, please refer to the Oracle Applications Manager online help or the Oracle Enterprise Manager online help.

See: Agents, *Oracle Workflow Developer's Guide*.

### **Synchronizing License Statuses:**

This step is required only for the version of Oracle Workflow embedded in Oracle Applications. Some Oracle Applications products provide seeded events and subscriptions. In these cases, Oracle Workflow executes subscriptions only if the triggering event and the subscription are both owned by products that you have licensed with a status of Installed or Shared.

You can use the License Manager AD utility to review which products you currently have licensed. See: License Manager, *Oracle Applications AD Utilities Reference Guide*.

To ensure that the license status of the seeded events and subscriptions in the Business Event System is updated according to the status of the products you currently have licensed, you can run the Synchronize Product License and Workflow BES License concurrent program. Use the Submit Requests form in Oracle Applications to submit this concurrent program.

If you upgrade from an Oracle Applications release earlier than Release 11.5.9, you should run the Synchronize Product License and Workflow BES License concurrent program once after the upgrade to update the license status of the existing events and subscriptions in your Event Manager. Otherwise, subscriptions may not be correctly processed after the upgrade. Subsequently, when you license a product, Oracle Workflow automatically updates the license status for all the events and subscriptions owned by that product.

**Note:** Any events and subscriptions that you define with a customization level of User are always treated as being licensed.

See: Events (for Oracle Applications), *Oracle Workflow Developer's Guide* and Event Subscriptions (for Oracle Applications), *Oracle Workflow Developer's Guide*.

### **To submit the Synchronize Product License and Workflow BES License concurrent program**

1. Navigate to the Submit Requests form in Oracle Applications to submit the Synchronize Product License and Workflow BES License concurrent program. When



you install and set up Oracle Applications and Oracle Workflow, your system administrator needs to add this concurrent program to a request security group for the responsibility that you want to run this program from. The executable name for this concurrent program is "Synchronize Product License and Workflow BES License" and its short name is FNDWFLIC. See: Overview of Concurrent Programs and Requests, *Oracle Applications System Administrator's Guide*.

2. Select the Synchronize Product License and Workflow BES License concurrent program as the request to run. This program does not require any parameters. See: Running Reports and Programs, *Oracle Applications User's Guide*.
3. When you finish modifying the print and run options to define the schedule for this request, choose Submit to submit the request.

### **Cleaning Up the Workflow Control Queue:**

Oracle Workflow contains a standard Business Event System agent named WF\_CONTROL, which is associated with a standard queue that is also named WF\_CONTROL. This queue has a payload type of JMS Text message. The WF\_CONTROL agent is used for internal processing only, and is not meant for customer use. You should not place custom event messages on this queue.

The Generic Service Component Framework uses WF\_CONTROL to handle control events for containers and service components, such as notification mailer or agent listener service components. In Oracle Applications, WF\_CONTROL is also used for other Oracle Applications internal processing.

You do not need to schedule propagation for the WF\_CONTROL agent, because the middle tier processes that use WF\_CONTROL dequeue messages directly from its queue.

However, the subscribers to the WF\_CONTROL queue need to be cleaned up periodically.

- In the standalone version of Oracle Workflow, you can use an API called `WF_BES_CLEANUP.Cleanup_Subscribers()` to perform this cleanup.
- In Oracle Applications, a concurrent program named Workflow Control Queue Cleanup is automatically scheduled to perform this cleanup for you.

When a middle tier process for Oracle Applications or for standalone Oracle Workflow starts up, it creates a JMS subscriber to the queue. Then, when an event message is placed on the queue, a copy of the event message is created for each subscriber to the queue. If a middle tier process dies, however, the corresponding subscriber remains in the database. For more efficient processing, you should ensure that WF\_CONTROL is periodically cleaned up by removing the subscribers for any middle tier processes that are no longer active.

The `WF_BES_CLEANUP.Cleanup_Subscribers()` procedure sends an event named `oracle.apps.wf.bes.control.ping` to check the status of each subscriber to the WF\_CONTROL queue. If the corresponding middle tier process is still alive, it sends back a response. The next time the cleanup procedure runs, it checks whether responses have been received for each ping event sent during the previous run. If no response was received from a particular subscriber, that subscriber is removed. See: `Cleanup_Subscribers`, *Oracle Workflow API Reference*.

The recommended frequency for performing cleanup is every twelve hours. In order to allow enough time for subscribers to respond to the ping event, the minimum wait time

between two cleanup runs is thirty minutes. If you run the procedure again less than thirty minutes after the previous run, it will not perform any processing.

### **Control Queue Cleanup for Standalone Oracle Workflow**

If you are using the standalone version of Oracle Workflow, then use the `WF_BES_CLEANUP.Cleanup_Subscribers()` API to clean up the WF\_CONTROL queue. You can use the Oracle Workflow Manager component available through Oracle Enterprise Manager to submit and manage Workflow control queue cleanup database jobs. You can also use the procedures in the DBMS\_JOB or DBMS\_SCHEDULER packages to schedule and manage the `WF_BES_CLEANUP.Cleanup_Subscribers()` procedure as a database job. See the Oracle Workflow Manager online help and *Managing Job Queues, Oracle Database Administrator's Guide* or *Using the Scheduler, Oracle Database Administrator's Guide*.

### **Control Queue Cleanup for Oracle Applications**

If you are using the version of Oracle Workflow embedded in Oracle Applications, Oracle Workflow provides a concurrent program named Workflow Control Queue Cleanup, which uses the `WF_BES_CLEANUP.Cleanup_Subscribers()` API to perform the necessary cleanup. This concurrent program is scheduled to run every twelve hours by default, which is the recommended frequency for performing cleanup. You can optionally run this program with a different schedule if you want to perform cleanup at a different frequency.

#### **To submit the Workflow Control Queue Cleanup concurrent program**

1. Navigate to the Submit Requests form in Oracle Applications to submit the Workflow Control Queue Cleanup concurrent program. When you install and set up Oracle Applications and Oracle Workflow, your system administrator needs to add this concurrent program to a request security group for the responsibility that you want to run this program from. The executable name for this concurrent program is "Workflow Control Queue Cleanup" and its short name is `FNDWFBES_CONTROL_QUEUE_CLEANUP`. See: *Overview of Concurrent Programs and Requests, Oracle Applications System Administrator's Guide*.
2. Select the Workflow Control Queue Cleanup concurrent program as the request to run. This program does not require any parameters. See: *Running Reports and Programs, Oracle Applications User's Guide*.
3. When you finish modifying the print and run options to define the schedule for this request, choose Submit to submit the request.

In Oracle Applications, you can run a diagnostic test to check that the Workflow control queue is properly accessible. See: *Oracle Workflow Diagnostic Tests, page D-1*.

See: *Business Event System Control Events, Oracle Workflow Developer's Guide*, *Standard Agents, Oracle Workflow Developer's Guide*, and *Business Event System Cleanup API, Oracle Workflow API Reference*.

---

# Oracle Workflow Security

This chapter describes the architecture and configuration of security for Oracle Workflow.

This chapter covers the following topics:

- Oracle Workflow Security

## Oracle Workflow Security

The ability to control user access to Web and application content and to protect your site against people breaking into your system is critical. This chapter describes the architecture and configuration of security for Oracle Workflow.

For additional information about security, refer to the following documents:

- The *Oracle Application Server 10g Security Guide* provides an overview of Oracle Application Server security and its core functionality.
- The *Oracle Identity Management Concepts and Deployment Planning Guide* provides guidance for administrators of the Oracle security infrastructure.
- The *Oracle Database Security Overview* provides information about Oracle Database security.
- The Overview of Oracle Applications Security, *Oracle Applications System Administrator's Guide* provides information about Oracle Applications security.

## About Oracle Workflow Security

This section describes the Oracle Workflow security model.

### Oracle Workflow Security Model

Oracle Workflow uses a password-based security model to protect Web and application content.

- The standalone version of Oracle Workflow leverages the security architecture of Oracle Application Server and the Oracle Database.
- The version of Oracle Workflow embedded in Oracle Applications is part of the Oracle Applications security model in which users' privileges and access to functionality are based on responsibilities.

## Classes of Users and Their Privileges

For purposes of accessing Oracle Workflow Web pages, Oracle Workflow defines two classes of users: Workflow administrators and Workflow users.

In standalone Oracle Workflow, access to Oracle Workflow administrator features is controlled by the workflow administrator role defined in the Global Preferences page. Users associated with this role have access to all Oracle Workflow Web pages, including administrator pages, and can perform the operations available there. Users who are not associated with the workflow administrator role have more limited access to Oracle Workflow features.

In Oracle Applications, access to Oracle Workflow administrator features is controlled both by responsibilities, which determine what pages a user can access, and by the workflow administrator role defined in the Workflow Configuration page, which determines what administrative operations a user can perform. To perform administrative operations, users must both have a responsibility that includes Oracle Workflow administrator Web pages and be associated with the workflow administrator role. If users have an appropriate responsibility but are not associated with the workflow administrator role, then they can only view the administrator Web pages. Users must also have an appropriate responsibility to access the Oracle Workflow self-service user Web pages. In some cases users who are associated with the workflow administrator role can perform additional administrative operations in the self-service Web pages as well.

- Workflow administrators - Standalone Oracle Workflow users who are associated with the workflow administrator role, or Oracle Applications users who have an Oracle Workflow administrator responsibility and are associated with the workflow administrator role, can:
  - Access the administrator version of the Oracle Workflow Home page in standalone Oracle Workflow or the Oracle Workflow Administrator Home page in Oracle Applications.
  - Set global workflow preferences and their own individual user preferences.
  - View and respond to any user's notifications through the Worklist pages.
  - Define rules to handle notifications automatically in a user's absence.
  - View and update any user's processes in the Workflow Monitor in standalone Oracle Workflow, or in the administrator Status Monitor in Oracle Applications.
  - View Workflow item type definitions and launch test processes.
  - Launch demonstration processes, in standalone Oracle Workflow.
  - Manage business events and event subscriptions.
- Workflow users - Standalone Oracle Workflow users who are not associated with the workflow administrator role, or Oracle Applications users who have an Oracle Workflow user responsibility, can:
  - Access the user version of the Oracle Workflow Home page in standalone Oracle Workflow or the Oracle Workflow Self-service Home page in Oracle Applications.
  - Set their own individual user preferences.
  - View and respond to their own notifications through the Worklist pages.
  - Define rules to handle their own notifications automatically in their absence.

- View and respond to notifications for other users who have granted access to their worklists.
- View their own processes in the Workflow Monitor in standalone Oracle Workflow, or in the self-service Status Monitor in Oracle Applications. In Oracle Applications, users who are associated with the workflow administrator role can also reassign notifications or cancel workflows in the self-service Status Monitor.
- View Workflow item type definitions, in standalone Oracle Workflow.

Additionally, administrators who manage standalone Oracle Workflow must have the Oracle Application Server administrator role to access the Workflow Manager component within Oracle Enterprise Manager. Administrators who manage Oracle Workflow in Oracle Applications must have the Oracle Applications System Administrator responsibility to access Oracle Applications Manager, or must have an Oracle Workflow administrator responsibility that includes direct access to the Workflow Manager component within Oracle Applications Manager.

Also, administrators and developers who need to run Oracle Workflow scripts and programs or save workflow item type definitions to the database must have the password for the Oracle Workflow schema in the database.

## Resources Protected

Oracle Workflow provides security to protect the following resources.

- Oracle Workflow Web pages - Standalone Oracle Workflow users must log in using Oracle HTTP Server authentication before they can access Oracle Workflow Web pages. Oracle Applications users must log into Oracle Applications before they can access Oracle Workflow Web pages.
- Workflow Manager - An Oracle Application Server or Oracle Database administrator must log into Oracle Enterprise Manager in order to access the Workflow Manager component. Similarly, an Oracle Applications system administrator must log into Oracle Applications Manager in order to access the Workflow Manager component.
- Oracle Workflow Builder - No login is required to run the Oracle Workflow Builder development tool on a client PC. However, in order to view or save item type definitions in the database using Oracle Workflow Builder, a developer must provide the Oracle Workflow schema name and password.
- Administrative scripts and programs - An administrator must provide the Oracle Workflow schema name and password in order to run Oracle Workflow administrative scripts, the Workflow Definitions Loader, the Workflow XML Loader, or the standalone Java Function Activity Agent. Additionally, an Oracle Applications system administrator must log into Oracle Applications or Oracle Applications Manager before running Oracle Workflow concurrent programs.
- E-mail notifications - Oracle Workflow supports sending e-mail notifications to users and processing e-mail responses to update workflow processes. Ultimately, the security of e-mail notifications and responses depends on the security of your e-mail application. Oracle Workflow also provides several features to validate e-mail responses and protect application content from unauthorized updates. For more information, see: E-mail Notification Security, page 2-73.
- Notifications - In Oracle Applications, Oracle Workflow supports electronic signatures for users' responses to notifications. You can optionally require notification responses to be authenticated by either a password-based signature or

a certificate-based signature. See: #WF\_SIG\_POLICY Attribute, *Oracle Workflow Developer's Guide*.

## **Authorization and Access Enforcement**

Users are prompted for a username and password in order to access Oracle Workflow Web pages and Oracle Enterprise Manager or Oracle Applications Manager. In Oracle Applications, users must additionally be assigned a responsibility that includes Oracle Workflow Web pages before they can access these pages.

Users must provide the Oracle Workflow database schema username and password to run administrative scripts and programs and to access workflow definitions in the database through Oracle Workflow Builder.

For information about authorization and validation of e-mail notification responses, see: E-mail Notification Security, page 2-73.

## **Leveraging Oracle Application Server Security Services**

Oracle Workflow leverages Oracle HTTP Server authentication to control access to Oracle Workflow Web pages. In standalone Oracle Workflow, a PL/SQL Database Access Descriptor (DAD) is created for the Oracle Workflow Web pages during installation. You can use either the HTTP or HTTPS protocol. HTTPS, which is HTTP over Secure Sockets Layer (SSL) is recommended. For instructions on configuring SSL with Oracle HTTP Server, please refer to the *Oracle HTTP Server Administrator's Guide*.

For information about use of Oracle HTTP Server by Oracle Applications, see: Administering Oracle HTTP Server, *Oracle Applications System Administrator's Guide*.

## **Leveraging Oracle Identity Management Infrastructure**

For standalone Oracle Workflow, you can choose one of two predefined directory service implementations during installation.

- You can integrate with Oracle Internet Directory as your directory repository. This option is recommended in order to leverage Oracle Internet Directory management tools and to support single sign-on through LDAP external authentication with Oracle Application Server Single Sign-On Server.
- If you do not choose integrate with Oracle Internet Directory, you can use Oracle Database users and roles as your directory repository, with login authentication through Oracle HTTP Server.

In Oracle Applications, an Oracle Workflow directory service based on users and roles from the unified Oracle Applications environment is automatically implemented for you during installation. For information about setting up Oracle Applications to use Oracle Internet Directory and single sign-on, see: Implementing Single Sign-on for Oracle Applications 11i with Login Server Authentication Using Oracle Internet Directory, *Oracle Applications System Administrator's Guide*.

## **Configuring Oracle Application Server Security Framework for Oracle Workflow**

This section describes configuration considerations in Oracle HTTP Server for standalone Oracle Workflow. For Oracle Applications, see: Oracle9i Application Server and Oracle Applications, *Oracle Applications System Administrator's Guide*.

## Configuring Oracle Application Server Security Framework Options for Oracle Workflow

If you install Oracle Workflow shipped with Oracle Application Server and you choose to implement Oracle Internet Directory and single sign-on integration in the Workflow Configuration Assistant, the DAD created for Oracle Workflow in Oracle HTTP Server is automatically protected in the `mod_osso` configuration file during installation. For more information, see the installation documentation for your installation of Oracle Workflow.

## Configuring Oracle Workflow Security

You can configure the following options in Oracle Workflow to take advantage of the security features you want.

### Configuring Oracle Workflow Security Options

You can set the following global workflow preferences related to security.

- Workflow administrator, which defines the role that has administrator privileges in accessing Oracle Workflow Web pages.
- LDAP preferences, if you are integrating with Oracle Internet Directory. LDAP preferences include LDAP host, LDAP port, LDAP password, LDAP changelog base directory, and LDAP user base directory. LDAP password values are masked as asterisks in the display and are stored in encrypted form.

See: Setting Global User Preferences, page 2-11.

For information about configuring e-mail notification security options, see: E-mail Notification Security, page 2-73.

## Configuring Standalone Oracle Workflow Options for Oracle Application Server Security Framework

During installation of standalone Oracle Workflow, the Workflow Configuration Assistant lets you enter LDAP preferences in order to integrate with Oracle Internet Directory. If you do choose to integrate with Oracle Internet Directory, the Workflow Configuration Assistant automatically installs the appropriate version of the Workflow PL/SQL security package, called `WFA_SEC`, and a directory service implementation based on Oracle Internet Directory.

For Oracle Workflow shipped with Oracle Application Server, Oracle Internet Directory integration also enables Oracle Workflow to participate in Oracle Application Server single sign-on.

If you choose to integrate with Oracle Internet Directory, you must perform the following steps:

1. Perform an initial synchronization of the user information in your Workflow directory service with Oracle Internet Directory.
2. Schedule synchronization periodically between your Workflow directory service and Oracle Internet Directory.

See: Integrating an Oracle Workflow Directory Service with Oracle Internet Directory, page 2-21 and Synchronizing Workflow Directory Services with Oracle Internet Directory, page 2-40.

## Configuring Standalone Oracle Workflow Options for Database Security

If you do not enter LDAP preferences in the Workflow Configuration Assistant during installation, then a directory service implementation based on Oracle Database users

and roles is automatically installed, along with the appropriate version of the Workflow PL/SQL security package, called WFA\_SEC.

In this case, you should modify the default directory service views to add e-mail addresses for the database users if you want them to be able to receive e-mail notifications. See: Integrating an Oracle Workflow Directory Service with Oracle Database Users, page 2-22.

**Note:** You can also implement a custom version of the WFA\_SEC security package, if you want to implement your own application-specific security. However, note that only the predefined versions of the WFA\_SEC security package provided by Oracle Workflow are supported by Oracle. See: Oracle Workflow Support Policy, *Oracle Workflow Developer's Guide*.

### Configuring Oracle Workflow Options for Oracle Applications Security

If you are using the version of Oracle Workflow embedded in Oracle Applications, directory service views for users and roles from the unified Oracle Applications environment are automatically implemented for you during installation. In Oracle Applications, Oracle Workflow uses a directory service model in which denormalized information is maintained in the Workflow local tables for performance gain. The local Workflow directory service tables store user and role information originating from various other Oracle Applications modules, as well as ad hoc users and roles, so that the Workflow directory service views can access this information with good performance. You should maintain synchronization between the user and role information stored in application tables by the source modules and the information stored in the Workflow local tables. See: Setting Up a Directory Service for Oracle Workflow Embedded in Oracle Applications, page 2-23.

Also, in Oracle Applications, you can optionally give users access to the Advanced Worklist and Personal Worklist Web pages from any responsibility you choose. To make a Worklist available from a particular responsibility, you must add the appropriate function to the menu associated with that responsibility. Then you can assign that responsibility to your users. See: Adding Worklist Functions to User Responsibilities, page 2-132.

Similarly, you can give users access to the Workflow Monitor Test Application from a responsibility that you choose. To make the Workflow Monitor Test Application available from a particular responsibility, you must add its menu to a top-level menu for that responsibility. Then you can assign that responsibility to your users. See: Testing Status Monitor Access, page 5-33.

You can use a special message attribute with the internal name #WF\_SIG\_POLICY to require that a user's response to a notification be authenticated by an electronic signature. Otherwise, the response will not be considered valid.

- If you define a notification to require a password-based signature, users must confirm their response by entering their Oracle Applications user name and password.
- If you define a notification to require a certificate-based signature, users must sign their response with a valid X.509 certificate issued by a certificate authority.

See: #WF\_SIG\_POLICY Attribute, *Oracle Workflow Developer's Guide*.

Additionally, in Oracle Applications a user can grant access to his or her worklist to another user. That user can then act as a proxy to handle notifications on the owner's behalf. The worklist access feature lets one user allow another user to handle his or



her notifications without giving the second user access to any other privileges or responsibilities that the first user has in Oracle Applications. However, note that a user who has access to another user's worklist can view all the details of that user's notifications and take most actions that the owner can take on the notifications. Ensure that your users take all necessary security considerations into account when they choose to grant worklist access to another user. See: *Worklist Access, Oracle Workflow User's Guide*.



---

## Oracle Workflow Home Page

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

This chapter covers the following topics:

- Accessing the Standalone Oracle Workflow Home Page
- Accessing the Oracle Workflow Administrator Home Page for Oracle Applications
- Defining Vacation Rules for Users in Oracle Applications
- Searching for Users' Notifications in Oracle Applications

### Accessing the Standalone Oracle Workflow Home Page

Use the standalone 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, page 2-40.

**Note:** For information about the administrator home page in Oracle Applications, see: Accessing the Oracle Workflow Administrator Home Page, page 4-3.

#### 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, page 2-11.

**Important:** 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. 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.
3. 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, *Oracle Workflow User's Guide*.
4. Choose the Find Notifications link to locate notifications that match specific criteria and act on those notifications. See: To Find Notifications, *Oracle Workflow User's Guide*.
5. 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, *Oracle Workflow User's Guide*.
6. 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, page 5-7.
7. Choose the User Preferences link to set the preferences that control how you interact with Oracle Workflow. See: Setting User Preferences, *Oracle Workflow User's Guide*.
8. If you are logged in as a role with workflow administrator privileges, you can choose the Global Preferences link to set global preferences that control how users interact with Oracle Workflow. See: Setting Global User Preferences, page 2-11.
9. If you are logged in as a role with workflow administrator privileges, the Document Nodes link appears. This functionality is reserved for future use. You do not need to perform any actions with this link.
10. Choose the Item Type Definition link to access the Find Item Type Web page. Use the Find Item Type Web page to query for a specific item type definition to display in the Item Type Definition page. See: Item Type Definition Page, *Oracle Workflow Developer's Guide*.
11. If you are logged in as a role with workflow administrator privileges, you can choose the Launch Processes link to test a specific workflow process definition. See: Testing Workflow Definitions, *Oracle Workflow Developer's Guide*.
12. If you are logged in as a role with workflow administrator privileges, you can choose the Demonstration Page link to access the Demonstration home page. You can use the Demonstration home page to launch any of the demonstration workflow processes provided with Oracle Workflow. See: Sample Workflow Processes, *Oracle Workflow Developer's Guide*.
13. If you are logged in as a role with workflow administrator privileges, you can choose the Events link to view and define Business Event System events. See: To Define an Event, *Oracle Workflow Developer's Guide*.

14. If you are logged in as a role with workflow administrator privileges, you can choose the Find Event/Group link to query for events and event groups that match certain search criteria. See: To Find Events, *Oracle Workflow Developer's Guide*.
15. If you are logged in as a role with workflow administrator privileges, you can choose the Systems link to view and define Business Event System systems. See: To Define a System, *Oracle Workflow Developer's Guide*.
16. If you are logged in as a role with workflow administrator privileges, you can choose the Find System link to query for systems that match certain search criteria. See: To Find Systems, *Oracle Workflow Developer's Guide*.
17. If you are logged in as a role with workflow administrator privileges, you can choose the Agents link to view and define Business Event System agents. See: To Define an Agent, *Oracle Workflow Developer's Guide*.
18. If you are logged in as a role with workflow administrator privileges, you can choose the Find Agent link to query for agents that match certain search criteria. See: To Find Agents, *Oracle Workflow Developer's Guide*.
19. If you are logged in as a role with workflow administrator privileges, you can choose the Event Subscriptions link to view and define Business Event System subscriptions. See: To Define an Event Subscription, *Oracle Workflow Developer's Guide*.
20. If you are logged in as a role with workflow administrator privileges, you can choose the Find Subscription link to query for subscriptions that match certain search criteria. See: To Find Event Subscriptions, *Oracle Workflow Developer's Guide*.
21. If you are logged in as a role with workflow administrator privileges, you can choose the Raise Event link to raise a business event to the Event Manager. See: Raising Events, *Oracle Workflow Developer's Guide*.
22. If you are logged in as a role with workflow administrator privileges, you can choose the System Signup link to sign up one system with another to receive business events. See: Signing Up Systems, *Oracle Workflow Developer's Guide*.
23. If you are logged in as a role with workflow administrator privileges, you can choose the System Identifier link to retrieve the system identifier information required for signing up systems. See: To Retrieve System Identifier Information, *Oracle Workflow Developer's Guide*.

## Accessing the Oracle Workflow Administrator Home Page for Oracle Applications

Use the Oracle Workflow administrator home page to link to Oracle Workflow's Web-based administration features in Oracle Applications. This page centralizes your access to the features.

**Note:** Oracle Applications Framework Personalization provides the ability to customize Oracle self-service Web application pages. If you are logged in as a user or with a responsibility for which the Personalize Self-Service Defn profile option is set to Yes, you can choose the Personalize button or Personalize Region links to create your personalizations. For more information, please refer to OracleMetaLink note 268969.1, *Oracle Applications Framework Personalization Guide*.

**Note:** For information about the standalone Oracle Workflow home page, see: Accessing the Standalone Oracle Workflow Home Page, page 4-1.

### **To Access the Oracle Workflow Administrator Home Page:**

1. Use a Web browser to navigate to the administrator home page, using a responsibility and navigation path specified by your system administrator. See: Oracle Workflow Administrator Navigation Paths, page A-1.
2. To set your Oracle E-Business Suite general preferences, including language and notification preferences, select the Preferences button. See: Set Preferences, *Oracle Applications User's Guide*.
3. The Notifications at a Glance region of the home page lists your five highest priority notifications, ordered by priority and then by date.
  - To view and respond to a notification, select the notification subject link in the Subject column. See: To View the Details of a Notification, *Oracle Workflow User's Guide*.
  - To view the complete list of all your notifications in the Advanced Worklist, select the Full List button. See: To View Notifications from the Advanced Worklist, *Oracle Workflow User's Guide*.
  - To define vacation rules for yourself, select the Vacation Rules link. See: To View and Maintain Vacation Rules, *Oracle Workflow User's Guide*.
  - To grant access to your worklist to another user, select the Worklist Access link. See: To Grant Access to Your Worklist, *Oracle Workflow User's Guide*.
  - To view another user's worklist, select the Switch User button, and then select the user you want. This button appears only if you have been granted access to another user's worklist.
4. To view workflow definitions and run test workflow processes, choose the Developer Studio tab. See: Testing Workflow Definitions Using the Developer Studio, *Oracle Workflow Developer's Guide*.
5. To manage Business Event System events, subscriptions, systems, and agents, choose the Business Events tab. See: Event Manager for Oracle Applications, *Oracle Workflow Developer's Guide*.
6. To view the administrator version of the Status Monitor, choose the Status Monitor tab. See: Accessing the Administrator Monitor, page 5-10.
7. To view notifications in the Worklist, choose the Notifications tab. See: To View Notifications from the Advanced Worklist, *Oracle Workflow User's Guide*.
8. To set global workflow preferences, choose the Administration tab, and choose Workflow Preferences in the horizontal navigation. See: Setting Global User Preferences, page 2-11.
9. To define vacation rules that automatically handle notifications in a user's absence, choose the Administration tab, and choose Vacation Rules in the horizontal navigation. See: Defining Vacation Rules for Users in Oracle Applications, page 4-5.
10. To access notifications belonging to another user, choose the Administration tab, and choose Notification Search in the horizontal navigation. See: Searching for Users' Notifications in Oracle Applications, page 4-6.

## Defining Vacation Rules for Users in Oracle Applications

Use vacation rules to handle notifications automatically when users are not available to manage their notifications directly, such as when they are on vacation. You can define rules to perform the following actions automatically when a notification arrives:

- Reassign the notification to another user

**Note:** A workflow may include special logic to restrict reassignment of notifications. If so, Oracle Workflow does not apply any vacation rules to reassign those notifications, but simply delivers the notifications to the worklist of the original recipient. See: #HIDE\_REASSIGN Attribute, *Oracle Workflow Developer's Guide*.

- Respond to the notification with a predefined response, or close a notification that does not require a response

**Note:** If this notification requires a password-based signature or certificate-based digital signature in the response, you cannot respond to the notification through a vacation rule. In this case Oracle Workflow simply delivers the notification to the worklist of the original recipient. The recipient must use the Notification Details page to submit a response and provide the required signature. See: To View the Details of a Notification, *Oracle Workflow User's Guide*.

- Deliver the notification to the original recipient's worklist as usual, with no further action

Use the Vacation Rules administrator page to define rules for automatic notification processing for your users. Each rule is specific to a role.

**Note:** You must have workflow administrator privileges to define vacation rules for other users in the Vacation Rules page. Workflow administrator privileges are assigned in the Workflow Configuration page. See: Setting Global User Preferences, page 2-11.

A vacation rule can apply to messages of all item types, to all messages belonging to a specific item type, or to a specific type of message belonging to a specific item type. Each time a notification is sent to a user, Oracle Workflow tests the notification against that user's vacation rules. First Oracle Workflow checks whether the user has any active rules for that specific message type. If not, it checks whether the user has any active rules for that specific item type. Finally, it checks whether the user has any active rules for messages of all item types. 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 that a forwarding cycle has occurred and ceases executing any further forwarding rules, marking the notification as being in error.

### To define vacation rules for a user:

1. Navigate to the Vacation Rules page by choosing the Administration tab in the Oracle Workflow administrator Web pages and choosing Vacation Rules in the horizontal navigation.
2. Search for the role for which you want to define vacation rules.  
  
The list of existing rules for the selected role includes rules defined by the individual user as well as rules defined by an administrator for that user. A rule's active or inactive status depends on whether the current date falls within the rule's effective dates.
3. To update a rule, select the Update icon for that rule. See: To Create or Update a Vacation Rule, *Oracle Workflow User's Guide*.
4. To delete a rule, select the Delete icon for that rule.
5. To create a new rule, select the Create Rule button. See: To Create or Update a Vacation Rule, *Oracle Workflow User's Guide*.

## Related Topics

Vacation Rules, *Oracle Workflow User's Guide*

Setting Up Vacation Rule Options, page 2-134.

## Searching for Users' Notifications in Oracle Applications

Use the Notifications administrator page to search for and access notifications sent to your users.

**Note:** You must have workflow administrator privileges to access other users' notifications in the Notifications page. If you do not have administrator privileges, you can only search for and access your own notifications. Workflow administrator privileges are assigned in the Workflow Configuration page. See: Setting Global User Preferences, page 2-11.

### To search for notifications:

1. Navigate to the Notifications page by choosing the Administration tab in the Oracle Workflow administrator Web pages and choosing Notification Search in the horizontal navigation.
2. Search for the notifications you want to access. The following search criteria are available only if you have workflow administrator privileges:
  - Notification ID - Enter the numerical notification ID for a specific notification. Note that if you specify a notification ID, all other search criteria are ignored.
  - Owner - Select the role that owns the notifications.
  - To - Select the role to which the notifications were sent.

**Note:** Usually, the Owner role and the To role for a notification are the same. However, you can specify different roles in the Owner field and the To field to search for notifications that were reassigned



in Delegate mode. See: Setting the WF: Notification Reassign Mode Profile Option, page 2-133.

The following search criteria are always available:

- From - Select the role from which the notifications were sent. The From role for a notification is determined by the #FROM\_ROLE message attribute. See: #FROM\_ROLE Attribute, *Oracle Workflow Developer's Guide*.
- Status - Select the status of the notifications. You can search for notifications that are open, closed, or canceled, or to which an invalid reply was submitted, or choose All to display notifications in any status.
- Workflow Type - Select the workflow item type to which the notifications belong. The display name for the workflow type you select populates the Workflow Type field, and the internal name for the workflow type you select populates the Type Internal Name field.
- Type Internal Name - Enter the internal name of the workflow type to which the notifications belong, if you want to enter the internal name directly instead of selecting a value.
- Subject - Enter the subject line of the notifications. This field is case-sensitive. You can use the percent sign (%) as a wildcard character.
- Sent - Choose Today, This Week (last seven days), Last 2 Weeks (last fourteen days), Last 30 Days, Last 60 Days, or Any Time to specify when the notifications were sent. All the sent date ranges include the current date; for example, Last 2 Weeks includes today as well as the previous thirteen days.
- Due Date - Choose Last 2 Weeks (last fourteen days), This Week (last seven days), Today, Next 2 Weeks (next fourteen days), Next 30 Days, Next 60 Days, or Any Time to specify when the notifications should be completed. All the due date ranges include the current date; for example, Next 2 Weeks includes today as well as the next thirteen days.
- Priority - Select High, Normal, or Low as the notification priority, or choose All to display notifications of any priority.

**Note:** If you have workflow administrator privileges, you must enter at least one of the following criteria when you search in order to limit the size of the results list.

- Notification ID
- Owner
- To
- From

3. To view and respond to a notification, select the notification subject link in the Subject column. See: To View the Details of a Notification, *Oracle Workflow User's Guide*.

**Note:** If you take action on another user's notification, such as responding to, reassigning, or closing the notification or requesting more information, then Oracle Workflow updates the notification's action history to show that you performed that action.



---

# Monitoring Workflow Processes

This chapter discusses how to monitor an instance of a workflow process.

This chapter covers the following topics:

- Overview of Workflow Monitoring for Standalone Oracle Workflow
- Workflow Monitor
- Workflow Monitor Access
- Accessing the Administrator Monitor for Oracle Applications
- Viewing Workflows in the Status Monitor
- Viewing Child Workflows
- Viewing Activity History
- Viewing a Status Diagram
- Viewing Participant Responses
- Viewing Workflow Details
- Viewing Error Information for a Workflow
- Providing Access to the Status Monitor from Applications
- Testing Status Monitor Access
- Testing Standard Access
- Testing Guest Access
- Status Monitor Portlets

## Overview of Workflow Monitoring for Standalone Oracle Workflow

Once a workflow has been initiated for a work item, it may be necessary to check on its status to ensure that it is progressing forward, or to identify the activity currently being executed for the work item. Oracle Workflow provides a Java-based Workflow Monitor tool to access status information for an instance of a workflow process.

You can also use the standalone Oracle Workflow Manager component available through Oracle Enterprise Manager as an additional administration tool to review and manage work items. For more information, please refer to the Oracle Enterprise Manager online help. Additionally, Oracle Workflow provides a view called `WF_ITEM_ACTIVITY_STATUSES_V` that lets you programmatically access workflow status information. See: Oracle Workflow Views, *Oracle Workflow API Reference*.

**Note:** For information about the Status Monitor in Oracle Applications, see: Accessing the Administrator Monitor, page 5-10 and Accessing the Self-Service Monitor, *Oracle Workflow User's Guide*.

1. Workflow Monitor, page 5-2
2. Workflow Monitor Access, page 5-6

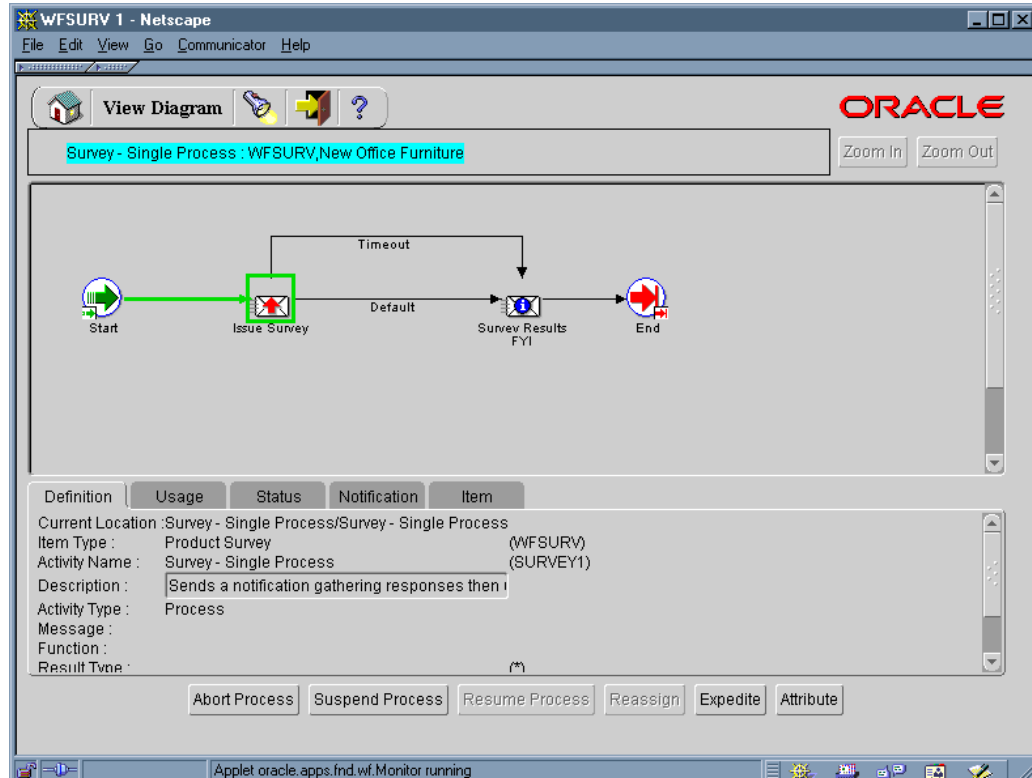
## Workflow Monitor

The Workflow Monitor in standalone Oracle Workflow is a tool that allows you to view and administer the status of a specific instance of a workflow process. You can use the point-and-click interface to display detailed status information about activities in the process as well as about the process as a whole. The Workflow Monitor can be run in 'USER' or 'ADMIN' mode, where 'ADMIN' mode provides additional details and functionality pertinent only to a workflow administrator. See: Workflow Monitor Access, page 5-6.

The Workflow Monitor consists of the following sections:

- Process Title, page 5-3
- Process Diagram Window, page 5-3
- Detail Tab Window, page 5-4
- Administration Buttons, page 5-5

### Workflow Monitor: View Diagram Window



### Process Title:

The process title appears in the upper left of the Workflow Monitor and displays the name of the workflow process and the name of the item type and user key that uniquely identify a running instance of that process in the process diagram window. If no user key has been set, then the item key is displayed instead. If you drill down into a subprocess in the process diagram window, the process title updates to display the subprocess name.

Click on any empty space in the process diagram window to deselect any selected activity in the process diagram window and to direct the detail tab window to display information about that process or subprocess as a whole.

### 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.

**Activity States in the Process Diagram**

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

- Any transition (arrow) that has been traversed appears with a thick green line, while an untraversed transition appears with a thin black line.
- Click on an activity icon in the diagram to select it and update the detail tab window to display information about the activity.
- Click on any empty space in the process 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 on an activity icon that represents a subprocess to drill down to the subprocess' diagram. 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 subprocess' diagram. Choose Zoom Out to navigate back to the process at the previous level.

### 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, where rows preceded by an asterisk (\*) or values shown in bold parentheses ( ) appear only when the monitor is run in 'ADMIN' mode:

#### Definition Tab

- Current Location: Process Display Name/Activity Display Name
- Item Type: Item Type display name (internal name)
- Activity Name: Activity display name (internal name)
- Description: Activity description
- Activity Type: Process, Notice, Event, or Function
- Message: Message internal name
- Function: Name of PL/SQL procedure called by activity
- Result Type: Result type display name (internal name)
- \*Cost: Function activity cost in seconds
- \*On Revisit: IGNORE, LOOP, or RESET
- \*Error Process: Error Item Type and Error Process internal name assigned to activity, if any

#### Usage Tab

- Current Location: Activity Display Name
- Start/End: No, Start, or End (process result)
- Performer: Role name or item attribute internal name
- \*Comment: Comments for the process activity node
- Timeout: N minutes or item attribute internal name

#### Status Tab

- Current Location: Activity Display Name
- Status: Activity status
- Result: Activity result (result code)
- Begin Date: Date activity begins
- End Date: Date activity ends
- Due Date: Date activity is due to timeout
- \*Notification: Notification ID
- Assigned User: Role name or item attribute internal name (shown only if Activity Status is 'ERROR')
- \*Error Name: Name of error
- Error Message: Error message
- \*Error Stack: Error stack

### Notification Tab

- Current Location: Activity Display Name
- \*ID: Notification ID
- 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 timeout

(If the selected activity is a notification that requires a response, then instead of displaying the above information, this tab displays the message response attributes as `<message_attribute> <type (Format)> <value>`. If the selected activity is a polling-type notification activity, where Expand Roles is checked and a response is required, then this tab displays the message response attributes as described above for each recipient. If the selected activity is a notification activity, where Expand Roles is on, but no response is required, then the recipient shown is simply the role, rather than the individual users in the role.)

### Item Tab

- Process Display Name: Item Type, Item Key (or User Key, if set)
- Owner: Owner of the item, not implemented yet
- Begin Date: Date workflow process instance is created
- End Date: Date workflow process instance is completed
- `<Item Attribute>: <type(format)> <value>`
- ...

### Administration Buttons:

The administration buttons appear beneath the detail tab window only when the Workflow Monitor is run in 'ADMIN' mode. Each button allows you to perform a different administrative operation by calling the appropriate Workflow Engine API. The buttons and their behavior are as follows:

- Abort Process - Available only if you select the process title or a process activity. Calls `WF_ENGINE.AbortProcess` to abort the selected process and cancel any outstanding notifications. Prompts for a result to assign to the process you are about to abort. The process will have a status of Complete, with the result you specify. See: *AbortProcess, Oracle Workflow API Reference*.
- Suspend Process - Available only if you select the process title or a process activity. Calls `WF_ENGINE.SuspendProcess` to suspend the selected process so that no further activities can be transitioned to. See: *SuspendProcess, Oracle Workflow API Reference*.
- Resume Process - Available only if you select a suspended process. Calls `WF_ENGINE.ResumeProcess` to resume the suspended process to normal execution status. Activities that were transitioned to when the process was suspended are now executed. See: *ResumeProcess, Oracle Workflow API Reference*.
- Reassign - Available only if you select a notification activity. Calls `WF_ENGINE.AssignActivity` to reassign a notification activity to a different

performer. Prompts for a role name. See: *AssignActivity, Oracle Workflow API Reference*.

- Expedite - Available if you select the process title, or an activity. Calls *WF\_ENGINE.HandleError* to alter the state of an errored activity, or to undo the selected activity and all other activities following it to rollback part of the process. Prompts you to select Skip, to skip the activity and assign it a specified result, or Retry, to reexecute the activity. See: *HandleError, Oracle Workflow API Reference*.
- Attribute - Always available so that you can change the value of an item type attribute. The current values appear for each item type attribute. After changing a value, choose OK to apply the change.

## Workflow Monitor Access

You can control a user's access to the Workflow Monitor in one of two ways. You can either depend on the workflow-enabled application to control access to the Workflow Monitor or provide direct access to the Find Processes Web page.

### Application-controlled Access to the Workflow Monitor:

Identify within the logic of your application code, the workflow process instance(s) that a user is allowed to view, and whether to run the monitor in 'ADMIN' or 'USER' mode for that user. You must also provide a means in your application's user interface to call a Web browser application that supports Java 1.1.8 and AWT and pass it the Workflow Monitor URL that gets returned from the function *WF\_MONITOR.GetDiagramURL()*. The returned URL will have a hidden password attached that provides the user access to the Workflow Monitor in either 'ADMIN' or 'USER' mode. See: *GetDiagramUrl, Oracle Workflow API Reference*.

### Provide Access to the Find Processes Web Page:

Another way to access the Workflow Monitor is to pass the Find Processes URL to a Web browser that supports Java 1.1.8 and AWT. The Find Processes page requires user authentication before access. Depending on whether Oracle Workflow is configured to use Oracle Self-Service Web Applications or Oracle HTTP Server security, the user must log in using the appropriate username and password if he or she has not done so for the current browser session. If the user has workflow administrator privileges, the Find Processes Web page that appears lets the user search for any workflow process instance. If the user does not have workflow administrator privileges, the Find Processes Web page lets the user search for only processes that the user owns, as set by a call to the Workflow Engine *SetProcessOwner* API. The user can then display the notifications or the process diagram for any of those process instances in the Workflow Monitor. See: *Using the Find Processes Web Page, page 5-7*.

The Find Processes URL looks similar to the following:

```
<webagent>/wf_monitor.find_instance
```

*<webagent>* is the Web agent string that you can retrieve from the *WF\_WEB\_AGENT* token in the *WF\_RESOURCES* table by calling *WF\_CORE.TRANSLATE()*. See: *TRANSLATE, Oracle Workflow API Reference*.



**Note:** You can also access the Find Processes Web page from the Oracle Workflow home page. See: Accessing the Oracle Workflow Home Page, page 4-1.

### Using the Find Processes Web Page:

The Oracle Workflow Find Processes Web page allows you to query for a list of workflow process instances that match certain search criteria. From the Process List, page 5-8 that appears, you can select a single process instance to review in more detail.

You can view details about the completed notification activities in the Notifications List, page 5-8 Web page that appears, or choose Advanced Options to display details about other activities in the Activities List, page 5-9 Web page. You can also navigate to the Workflow Monitor from the Notifications List to administer the process or see a graphical representation of the process and its status.

#### To Specify Search Criteria in the Find Processes Page

1. You can enter search criteria using any combination of the following fields to find a subset of workflow process instances:
  - Process Status - Specify Any Status, Active, or Complete.
  - Item Type - Select the item type of the workflow process instances you want to find, or select All to find workflow process instances for all item types.
  - Item Key or User Key - Specify an item key or a user key. An item key presents the internal identifier of an item whereas a user key is an end-user identifier assigned to an item. A user key may not necessarily be unique to an item. See: *SetItemUserKey*, *Oracle Workflow API Reference*.
  - Process Name - Specify the display name of a process activity.
2. If you log on as a user with Workflow Administrator privileges, you can search for and display any process instance, even if you do not own the process. In the Process Owner field, enter the internal name of any role defined in WF\_ROLES to list only processes owned by that role. Alternatively, leave the field blank to list all process instances that match your search criteria regardless of the process owner.

If you do not have Workflow Administrator privileges, then the Process Owner field reflects the internal name of the role you are logged in as for the current Web session and you are allowed to search and display only processes that you initiated or are the primary participant of.

**Note:** You can set the owner of a process by making a call to the WF\_ENGINE.SetItemOwner API. The owner of a process is the person who initiated the process or is the primary participant of the process.

3. Optionally, you can also find workflow process instances with activities that are Suspended, In Error, or that have Any Status.
4. You can find workflow process instances that have activities waiting for a response from a particular user or role.
5. You can also identify workflow process instances that have not progressed for a specified number of days.

- When you finish entering your search criteria, choose Find to display all matching process instances in the Process List Web page.

#### To Review the Process List

- The Process List provides a summary of all workflow process instances that match your search criteria as specified in the Find Processes Web page.
- The process instances are listed in ascending order first by item type, then by item key.
- The Process List summarizes the status of each process instance, as indicated by the Complete, In Error, and Suspended columns.
- Choose a process link in the Process Name column to display the Notifications List for that process instance.

#### To Review the Notifications List

- The Notifications List shows for the selected process instance, all the current notifications that have been sent that require a special Result response. In other words, these are the notification activities that allow the process to branch based on the recipient's response.

#### Workflow Monitor: Notifications List

Done	Who	Activity	Started	Duration	Result
✓	<a href="#">KWALKER</a>	<a href="#">Notify Requisition Approval Required</a>	04-DEC-2000 16:54:04	58 Seconds	Approve
	<a href="#">CDOUGLAS</a>	<a href="#">Notify Requisition Approval Required</a>	04-DEC-2000 16:55:03	14 Seconds	

- The Notification List summarizes what each notification activity is, who it is assigned to, when it was sent, whether it has been completed, how many days have passed before completion, as well as what its result is.

**Note:** If the process itself is in an error state, and the cause of the error was from a notification, the result of that notification may appear as a link in the Result column. Choose that link to display the cause of the error.

- Choose a user link in the Who column if you want to send e-mail to the user that a notification has been assigned to.

**Note:** You can display a helpful hint about any link on the Notifications List Web page by placing your cursor over the link. The hint appears in your Web browser's status bar.

4. Choose a notification activity link in the Activity column if you want to view the full definition of a notification activity.
5. If a notification activity is still open and requires a response, and you are logged on with workflow administrator privileges, an icon will appear after the notification activity name in the Activity column. You can click on this icon to go to the Notification Details page where you can directly respond to this notification. When complete your response, choose the browser Back button to return to the Notifications List.
6. Choose Advanced Options to go to the Activities List Web page where you can specify advanced criteria to search and display specific activities of interest for the process. See: To Filter Activities in the Activities List, page 5-9.
7. You can also choose the View Diagram button to display the selected process instance in the Workflow Monitor for a graphical representation of the process status. If you connected to the current Web session as a user with Workflow Administrator privileges, the Workflow Monitor displays the process in 'ADMIN' mode, otherwise the process is displayed in 'USER' mode. See: Workflow Monitor, page 5-2.

**Note:** If the process you select is a member of a parent/child process, a parent/child hierarchy list appears on the left hand side. The hierarchy list show links to corresponding parent and child instances of the current process instance. The links invoke the Notifications List on the selected parent or child instance.

#### **To Filter Activities in the Activities List**

1. The Activities List Web page lets you specify various criteria to filter for specific activities of interest.
2. Use the Activity Status Options check boxes to specify any activity status of interest. A status of Active also includes activities that are in the Notified, Deferred and Waiting state.
3. Use the Activity Type check boxes to specify the types of activities you want to view. You can choose to display notification activities that require a response, notification activities that do not require a response, function activities, activities that belong to the Standard item type, and/or event activities.
4. Once you finish selecting your criteria, choose Filter Activities to display the activities that match your criteria.
5. The resulting activities summary list includes the following columns of information:
  - Status - the status of the activity, which is either Active, Complete, Error or Suspend.
  - Who - the performer of the activity. If the activity is a function activity, the Workflow Engine is the performer. If the performer is a person, you can click on the link to that person's name to send mail to that individual. Note that if an activity is a notification activity that has Expand Roles on, multiple rows

of that same activity appear in the summary, with the individual members of the role listed in the Who column.

- Parent Activity - the process activity that this activity belongs to, unless the activity itself is the top level process. The parent activity provides a link to the details of its definition.
- Activity - the name of the activity. This activity provides a link to the details of its definition.
- Started - the date and time when the activity was initiated.
- Duration - the amount of time taken to complete the activity, shown as one unit lower than the most significant unit of time taken. If the activity took only seconds to complete, then only seconds are shown.
- Result - the result of the activity. If the activity has a status of Error, then the result provides a link to the error name, error message, and error stack associated with the error.

**Note:** You can display a helpful hint about any link on the Activities List Web page by placing your cursor over the link. The hint appears in your Web browser's status bar.

6. You can sort the activities summary list based on any column by clicking on a column header. An asterisk (\*) appears next to the column title to indicate that it is being used for sorting. If the asterisk is to the left of the column title, the sort order is ascending. If the asterisk is to the right of the column title, the sort order is descending. Clicking multiple times on the same column title reverses the sort order.
7. You can also choose the View Diagram button to display the process instance in the Workflow Monitor for a graphical representation of the process status. If you connected to the current Web session as a user with Workflow Administrator privileges, the Workflow Monitor displays the process in 'ADMIN' mode, otherwise the process is displayed in 'USER' mode. See: Workflow Monitor, page 5-2.

## Related Topics

Setting Up an Oracle Workflow Directory Service, page 2-19

Setting Global User Preferences, page 2-11

## Accessing the Administrator Monitor for Oracle Applications

The Administrator Monitor lets you view and administer runtime workflows. You can use the monitor to review the activities performed for a workflow, check the status of the workflow by viewing the status diagram, examine participant responses to notifications sent by the workflow, and review details about the workflow definition and attributes.

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. For example, you can update workflow attributes, suspend and resume a workflow, cancel a workflow, or rewind the workflow to an earlier activity stage. You can also skip or retry an individual activity within a workflow, reassign a notification activity, or suspend and resume a process activity. Workflow administrator privileges

are assigned in the Workflow Configuration page. See: Setting Global User Preferences, page 2-11.

**Note:** If you intervene in a workflow process with an administrative operation such as skipping, retrying, or reassigning an activity, then Oracle Workflow updates the audit trail for the process to show that you performed that operation.

You can also use the Oracle Workflow Manager component of Oracle Applications Manager as an additional administration tool to review and manage work items. For more information, please refer to the Oracle Applications Manager online help. Additionally, Oracle Workflow provides a view called `WF_ITEM_ACTIVITY_STATUSES_V` that lets you programmatically access workflow status information. See: Oracle Workflow Views, *Oracle Workflow API Reference*.

**Note:** For information about the Workflow Monitor in standalone Oracle Workflow, see: Overview of Workflow Monitoring for Standalone Oracle Workflow, page 5-1.

1. Viewing Workflows in the Status Monitor, page 5-11
2. Viewing Child Workflows, page 5-13
3. Viewing Activity History, page 5-14
4. Viewing a Status Diagram, page 5-16
5. Viewing Participant Responses, page 5-18
6. Viewing Workflow Details, page 5-19
7. Viewing Error Information for a Workflow, page 5-20

## Viewing Workflows in the Status Monitor

When you access the Status Monitor, you can search for the workflows you want to review.

**Note:** If you have workflow administrator privileges, you can search for workflows owned by any user. If you do not have workflow administrator privileges, 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 administrator Status Monitor, using a responsibility and navigation path specified by your system administrator. See: Oracle Workflow Administrator Navigation Paths, page A-1.
2. In the Workflows page, search for the workflows you want to review. The search criteria are:
  - Workflow Type - Select the workflow item type you want to review. The display name for the workflow type you select populates the Workflow Type field, and the internal name for the workflow type you select populates the Type Internal Name field.

- **Type Internal Name** - Enter the internal name of the workflow type you want to review, if you want to enter the internal name directly instead of selecting a value.
- **Workflow Owned By** - If you have workflow administrator privileges, select the user who owns the workflows you want to review.

If you do not have workflow administrator privileges, you can only search for workflows that you own. In this case, Oracle Workflow displays your name as a non-editable value in the Workflow Owned By field.

- **Item Key** - Enter the item key that uniquely identifies the workflow you want to review. You can enter a partial value to search for workflows whose item keys begin with that value.
- **User Key** - Enter the user key that identifies the workflow you want to review. You can enter a partial value to search for workflows whose user keys begin with that value.
- **Workflow 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
- **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.

**Note:** You must enter at least one of the following criteria when you search in order to limit the size of the results list.

- Workflow Type
- Type Internal Name
- Workflow Owned By
- Workflow Started - If you search only by this option, you must select a specific start date range. You cannot use Workflow Started with the Any Time value as your only search option.

You can also enter the following additional search criteria to search for workflows by activity characteristics.

- **Activity Status** - Select an activity status to display workflows with one or more activities in that status, or select Any Status to display workflows with activities in any status. You can choose the following statuses:
  - Active
  - Complete
  - Deferred
  - Error

- Notified
  - Suspended
  - Waiting
  - Waiting for Response From - Enter a role to display workflows with activities that are waiting for a response from the specified recipient.
  - Days Without Progress - Enter a number of days to display in-process workflows with activities that have not progressed in the specified time.
3. The results region displays the workflows that match your search criteria.
    - To view the error details for an errored workflow, select the error icon or the error link in the Status column.
    - To send e-mail to the owner of a workflow, select the user link in the Owned By column.
    - To view child workflows for a workflow, select the child icon in the Child Workflows column.
  4. Use the monitor buttons to drill down to additional information for a workflow.
    - To review the activities executed within a workflow, select the workflow and select the Activity 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.
    - To view details for a workflow, including the workflow type definition and current workflow attribute values, select the workflow and select the Workflow Details button.

## Related Topics

Accessing the Administrator Monitor, page 5-10

## Viewing Child Workflows

The Child Workflows page shows the workflows that are designated as children of a particular workflow.

You can review the workflow type internal name and item key of the selected parent workflow, as well as details about each child workflow.

- To view the error details for an errored workflow, select the error icon or the error link in the Status column.
- To send e-mail to the owner of a workflow, select the user link in the Owned By column.

Use the monitor buttons to drill down to additional information for a workflow.

- To review the activities executed within a workflow, select the workflow and select the Activity 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.
- To view details for a workflow, select the workflow and select the Workflow Details button.

## Related Topics

Accessing the Administrator Monitor, page 5-10

## Viewing Activity History

The Activity History page shows information about the activities executed for a workflow.

Specify the activity type and activity status of the activities you want to view. All activity types and statuses are selected by default. To search for specific activities, deselect any activity types and statuses you do not want to view. At least one activity type and one activity status must be selected for a search to be performed.

- To view details about the definition and current status of an activity, select the activity name link in the Activity column.
- To send e-mail to the performer of a notification, select the user link in the Performer column.

If you have workflow administrator privileges, you can use the activity administration icons to perform administrative operations on notification or process activities that are not yet complete.

- To reassign a notification activity that is not yet complete, select the reassign icon. See: To Reassign a Notification to Another User, *Oracle Workflow User's Guide*.

**Note:** The reassign icon appears only for notification activities that are not yet complete. Additionally, you cannot reassign a notification from the Status Monitor if the Expand Roles option is selected for the notification or if it is a voting notification that tallies the recipients' responses. See: Voting Activity, *Oracle Workflow Developer's Guide*.

- To suspend a process activity that is not yet complete, select the suspend icon in the Suspend/Resume column. All further processing for the process is suspended until the process is resumed.

**Note:** If you suspend the root process for a workflow, all subprocesses for the workflow are suspended as well.

**Note:** The suspend icon appears only for process activities that are not yet complete.

- To resume a suspended process activity, select the resume icon in the Suspend/Resume column. Processing for the process is resumed and any activities that were transitioned to while the process was suspended are now executed.



**Note:** If you resume the root process for a workflow, all subprocesses for the workflow are resumed as well.

**Note:** The resume icon appears only for process activities that are suspended.

If you have workflow administrator privileges, you can use the activity administration buttons to perform administrative operations on any activities that are not yet complete.

- To skip an activity and force the workflow to transition to the next activity, select the activity and select the Skip button. In the Skip page, enter the result value to assign to the activity if required.

**Note:** You cannot skip a suspended process activity. You must resume the process before you can skip it.

- To retry an activity, select the activity and select the Retry button.

**Note:** You cannot retry a suspended process activity. You must resume the process before you can retry it.

If you have workflow administrator privileges and you are viewing a workflow that is not yet complete, you can use the workflow administration buttons to perform administrative operations on the workflow.

- To view the status diagram for the workflow, select the View Diagram button.
- To change the values of any item attributes, select the Update Attributes button. In the Update Workflow Attributes page, enter the new values you want.

**Note:** You cannot update attributes of type event. However, you can select the event message link to view the event message details.

- To rewind the workflow to an earlier activity stage, select the Rewind button. In the Rewind page, select the activity you want from the list of activities that the Workflow Engine has reached. Oracle Workflow stops processing at the current activity and resumes processing at the specified activity.

**Note:** You cannot rewind a suspended workflow. You must resume the workflow before you can rewind it.

- To suspend the workflow, select the Suspend Workflow button. All further processing for the workflow is suspended until the process is resumed, and all subprocesses are suspended as well.
- To resume the workflow if it is suspended, select the Resume Workflow button. Processing for the workflow is resumed, and all subprocesses are resumed as well. Any activities that were transitioned to while the workflow was suspended are now executed.
- To cancel the workflow, 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.

## Related Topics

Accessing the Administrator Monitor, page 5-10

## 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 Current Status region displays the process title, diagram, and detail tabs for the workflow. Beneath the detail tabs, the administration buttons appear.

### Process Title:

The process title appears in the upper left of the Current Status region and displays the workflow process name, type, and user key. If no user key has been set, then the item key is displayed instead. 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.

***Activity States in the Process Diagram***

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

- 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

**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.

- Status - Notification status
- Begin Date - Date notification is delivered

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

### Administration Buttons:

If you have workflow administrator privileges and you are viewing a workflow that is not yet complete, you can use the administration buttons to perform administrative operations on the workflow.

- To change the values of any item attributes, select the Update Attributes button. In the Update Workflow Attributes page, enter the new values you want.

**Note:** You cannot update attributes of type event. However, you can select the event message link to view the event message details.

- To rewind the workflow to an earlier activity stage, select the Rewind button. In the Rewind page, select the activity you want from the list of activities that the Workflow Engine has reached. Oracle Workflow stops processing at the current activity and resumes processing at the specified activity.

**Note:** You cannot rewind a suspended workflow. You must resume the workflow before you can rewind it.

- To suspend the workflow, select the Suspend Workflow button. All further processing for the workflow is suspended until the process is resumed, and all subprocesses are suspended as well.
- To resume the workflow if it is suspended, select the Resume Workflow button. Processing for the workflow is resumed, and all subprocesses are resumed as well. Any activities that were transitioned to while the workflow was suspended are now executed.
- To cancel the workflow, 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.

## Related Topics

Accessing the Administrator Monitor, page 5-10

## 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.

- 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.

**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 activity history for the workflow. See: Viewing Activity History, page 5-14.

### **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.

## **Related Topics**

Accessing the Administrator Monitor, page 5-10

## **Viewing Workflow Details**

The Workflow Details page shows information about a selected workflow.

The Workflow Definition region displays the following information about the workflow type:

- Internal Name - The workflow type internal name.
- Description - The workflow type description.
- Persistence Type - The persistence type, either Permanent if the runtime status information is maintained indefinitely until it is specifically purged, or Temporary if the runtime status information is maintained for a specified number of days after the workflow completion date before it can be purged.
- Persistence Days - If the persistence type is Temporary, the number of days from the time a workflow of this workflow type completes before its status audit trail can be purged.
- Selector - The selector/callback function that determines which process activity to run for the workflow type in a particular situation.

The Workflow Attributes region lists the names and values of the item attributes for the workflow. For an attribute of type event, select the event message link to view the event message details.

If you have workflow administrator privileges and you are viewing a workflow that is not yet complete, you can use the administration buttons to perform administrative operations on the workflow.

- To view the status diagram for the workflow, select the View Diagram button.
- To change the values of any item attributes, select the Update Attributes button. In the Update Workflow Attributes page, enter the new values you want.

**Note:** You cannot update attributes of type event. However, you can select the event message link to view the event message details.

- To rewind the workflow to an earlier activity stage, select the Rewind button. In the Rewind page, select the activity you want from the list of activities that the Workflow Engine has reached. Oracle Workflow stops processing at the current activity and resumes processing at the specified activity.

**Note:** You cannot rewind a suspended workflow. You must resume the workflow before you can rewind it.

- To suspend the workflow, select the Suspend Workflow button. All further processing for the workflow is suspended until the process is resumed, and all subprocesses are suspended as well.
- To resume the workflow if it is suspended, select the Resume Workflow button. Processing for the workflow is resumed, and all subprocesses are resumed as well. Any activities that were transitioned to while the workflow was suspended are now executed.
- To cancel the workflow, 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.

## Related Topics

Accessing the Administrator Monitor, page 5-10

## Viewing Error Information for a Workflow

The Workflow Errors page shows error information for an errored workflow.

The page displays 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.
- Error Stack - Context information to help you locate the source of the error.

**Note:** If you navigated to the Workflow Errors 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 activity, the page shows details for only that activity.

If the Workflow Errors page shows only one errored activity, and you have workflow administrator privileges, you can use the activity administration buttons to respond to the error.

- To view the status diagram for the workflow, select the View Diagram button.
- To reassign an errored notification activity, select the Reassign button. See: To Reassign a Notification to Another User, *Oracle Workflow User's Guide*.

**Note:** The Reassign button appears only for a notification activity. Additionally, you cannot reassign a notification from the Status Monitor if the Expand Roles option is selected for the notification or if it is a voting notification that tallies the recipients' responses. See: Voting Activity, *Oracle Workflow Developer's Guide*.

- To suspend an errored process activity, select the Suspend button. All further processing for the process is suspended until the process is resumed.

**Note:** If you suspend the root process for a workflow, all subprocesses for the workflow are suspended as well. The Suspend button appears only for an errored process activity.

- To resume an errored process activity that is suspended, select the Resume button. Processing for the process is resumed and any activities that were transitioned to while the process was suspended are now executed.

**Note:** If you resume the root process for a workflow, all subprocesses for the workflow are resumed as well. The Resume button appears only for an errored process activity that is suspended.

- To skip the errored activity and force the workflow to transition to the next activity, select the Skip button. In the Skip page, enter the result value to assign to the activity if required.

**Note:** You cannot skip a suspended process activity. You must resume the process before you can skip it.

- To retry the errored activity, select the Retry button.

**Note:** You cannot retry a suspended process activity. You must resume the process before you can retry it.

## Related Topics

Accessing the Administrator Monitor, page 5-10

## Providing Access to the Status Monitor from Applications

Application developers can provide access to the administrator and self-service versions of the Status Monitor from within an application. The Status Monitor supports the following access modes:

- Standard access - Loosely coupled access from an Oracle Applications Framework-based Web page to a Status Monitor page within the full Oracle Workflow application

- Guest access - Tightly coupled access from an Oracle Applications Framework-based Web page to a freestanding Status Monitor page for a particular workflow, without access to the rest of the Oracle Workflow application

## Menu Setup

Before you can add Status Monitor access to your application, you must set up the menu for the appropriate responsibility to include Status Monitor functionality through Oracle Workflow menus.

For standard or guest access from an Oracle Applications Framework-based Web page or an Oracle E-Business Suite form, the menu for the responsibility through which users access that page or form must also include the menu for the Status Monitor version and access mode you want. Otherwise, users will encounter function security errors when navigating to the Status Monitor from your page or form. To avoid these errors, add the appropriate Oracle Workflow menu to the top-level menu for your responsibility.

The menus for the Status Monitor are:

- Workflow Administrator Application (WF\_ADMINISTRATOR\_APPLICATION)  
- Required for standard access to the Administrator Monitor
- Workflow Guest Monitor Application (WF\_G\_MONITOR\_APPLICATION)  
- Required for guest access to the Administrator Monitor
- Workflow Self-Service Application (WF\_SELF\_SERVICE\_APPLICATION) - Required for standard access to the Self-Service Monitor
- Workflow Guest Self-Service Monitor Application (WF\_SSG\_MONITOR\_APPLICATION) - Required for guest access to the Self-Service Monitor

## Access through URLs

You can provide standard or guest access to the Status Monitor from an Oracle Applications Framework-based Web page. You can also provide guest access to the administrator version of the Status Monitor from Oracle Workflow notifications or PL/SQL applications that can call a URL.

In your application code, call an API to obtain or redirect to a URL for an Oracle Workflow Status Monitor page. For standard and guest access, Oracle Workflow provides Java methods in the `oracle.apps.fnd.wf.monitor.webui.Monitor` class to obtain or redirect to appropriate URLs. For guest access to the Administrator Monitor, Oracle Workflow also provides PL/SQL functions in the `WF_MONITOR` package to obtain appropriate URLs.

**Note:** For more information about the `oracle.apps.fnd.wf.monitor.webui.Monitor` class, refer to the Oracle Workflow Javadoc. For more information about the `WF_MONITOR` package, see: *Workflow Monitor APIs, Oracle Workflow API Reference*.

Display the Status Monitor by redirecting to the Status Monitor page you want or using the URL you obtained in whatever way is appropriate within your application code.

## Access from Oracle E-Business Suite Forms

You can provide standard or guest access from an Oracle E-Business Suite application to the Status Monitor by using self-service functions. You can call these



functions from an Oracle E-Business Suite form, or add the menus that contain the functions to another menu associated with another responsibility. Use the function `FND_FUNCTION.EXECUTE` to execute a Status Monitor function.

## Related Topics

Accessing the Administrator Monitor, page 5-10

Accessing the Self-Service Monitor, *Oracle Workflow User's Guide*

Overview of Function Security, *Oracle Applications System Administrator's Guide*

Overview of Menus and Function Security, *Oracle Applications Developer's Guide*

Overview of Form Development Steps, *Oracle Applications Developer's Guide*

Menus Window, *Oracle Applications Developer's Guide*

Standard Access, page 5-23

Guest Access, page 5-26

## Standard Access

Standard Status Monitor access provides loosely coupled access from an Oracle Applications Framework-based Web page or Oracle E-Business Suite form, to a Status Monitor page within the full Oracle Workflow application. In this mode, the specified Status Monitor page is displayed with the full Oracle Workflow menu, allowing users to navigate out of the Status Monitor and perform other tasks within Oracle Workflow. Locator links, also known as breadcrumbs, let users navigate from the Status Monitor back to the calling application.

With standard access, users are fully authenticated. Only users with workflow administrator privileges, as specified in the Workflow Configuration page, can view workflows owned by others and perform administrative operations in the Status Monitor. See: Setting Global User Preferences, page 2-11.

When you provide standard access to the Status Monitor from your application, you can optionally specify a workflow item type and item key to query and specify which page you want to initially display.

- If you specify both the item type and item key for a workflow, that workflow is automatically queried in the Status Monitor. You can choose to initially display the workflow in the main Workflows search page, the Activity History page in the Administrator Monitor or Notification History page in the Self-Service Monitor, the Status Diagram page, or the Participant Responses page. If you provide an item type and item key but do not specify an initial page, the workflow is initially displayed in the Activity History page in the Administrator Monitor or Notification History page in the Self-Service Monitor.

**Note:** The specified workflow is only displayed if the user owns that workflow or has workflow administrator privileges to view workflows owned by others. If the user does not have the necessary privileges to view the workflow, an error message is displayed. In this case the user can optionally select another Workflow tab.

- If you specify only a workflow item type, the main Workflows search page is displayed, and workflows of the specified type that were started within the last two weeks are automatically queried.
- If you do not specify a workflow item type, the main Workflows search page is displayed. No automatic query is performed.

## Standard Access in Java

Oracle Workflow provides Java methods to redirect to the Status Monitor with standard access or to obtain URLs for standard access to the Status Monitor. These methods are defined in the Java class called `oracle.apps.fnd.wf.monitor.webui.Monitor`.

- *Monitor.redirectToAdvanceUrl()* - Redirects to the Administrator Monitor with standard access.
- *Monitor.redirectToSimpleUrl()* - Redirects to the Self-Service Monitor with standard access.
- *Monitor.getAdvanceUrl()* - Returns a URL for standard access to the Administrator Monitor, in a form that can be used within an Oracle Applications Framework application page. For example, you can set this URL as a destination link on an `OAWebBean`. The URL is returned in the following format:

```
/OA_HTML/OA.jsp?OAFunc=[parameters...]
```

- *Monitor.getSimpleUrl()* - Returns a URL for standard access to the Self-Service Monitor, in a form that can be used within an Oracle Applications Framework application page. For example, you can set this URL as a destination link on an `OAWebBean`. The URL is returned in the following format:

```
/OA_HTML/OA.jsp?OAFunc=[parameters...]
```

When calling these methods, you must provide the following parameters to indicate how you want to display the Status Monitor:

- `pageContext` - The `OAPageContext` of the calling page.
- `itemType` - The internal name of a workflow item type to automatically query in the Status Monitor (optional).
- `itemKey` - An item key to automatically query in the Status Monitor (optional).
- `firstPage` - The Status Monitor page that you want to initially display (optional).
  - MAIN - Main Workflows search page
  - HISTORY - Activity History page in the Administrator Monitor or Notification History page in the Self-Service Monitor
  - DIAGRAM - Status Diagram page
  - RESPONSES - Participant Responses page

**Note:** For access to the HISTORY, DIAGRAM, or RESPONSES pages, you must specify an item type and item key.

- `retainCallingAM` - Specify `true` or `false` to indicate whether the `OAAApplicationModule` of the calling page should be retained while working in the Status Monitor. If you specify `true`, `retainAM=Y` is appended to the Status

Monitor URL; if you specify `false`, `retainAM=N` is appended to the URL. The default is `true`.

All method calls for standard access should be made from within an Oracle Applications Framework-based Web page.

### Standard Access from Oracle E-Business Suite Forms

You can provide standard access from an Oracle E-Business Suite application to the Status Monitor by using self-service functions. You can call these functions from an Oracle E-Business Suite form, or add the menus that contain the functions to another menu associated with another responsibility.

The following table lists the functions that provide standard access to the Status Monitor. These functions do not require any parameters.

#### **Standard Access Functions**

Function	Description
WF_STATUS_MONITOR	Displays the Workflows search page in the administrator version of the Status Monitor.
WF_SS_STATUS_MONITOR	Displays the Workflows search page in the self-service version of the Status Monitor.

You can call the function `FND_FUNCTION.EXECUTE` to execute a standard access function. See: `FND_FUNCTION.EXECUTE`, *Oracle Applications Developer's Guide*.

The following code example demonstrates how to execute the `WF_STATUS_MONITOR` function using `FND_FUNCTION.EXECUTE`.

```
FND_FUNCTION.EXECUTE (FUNCTION_NAME => 'WF_STATUS_MONITOR' );
```

See: Overview of Form Development Steps, *Oracle Applications Developer's Guide* and Menus Window, *Oracle Applications Developer's Guide*.

### Menu Setup

If you use a standard access function within your responsibility, you must add the menu containing that function to the top-level menu for your responsibility. The `WF_STATUS_MONITOR` function is seeded on the Workflow Administrator Application (`WF_ADMINISTRATOR_APPLICATION`) menu, and the `WF_SS_STATUS_MONITOR` function is seeded on the Workflow Self-Service Application (`WF_SELF_SERVICE_APPLICATION`) menu.

**Note:** You cannot add the Status Monitor functions to your menu directly. To include these functions, you must add the Oracle Workflow menu that contains the function you want.

The Workflow Administrator Application menu is seeded on the Workflow Administrator (New) menu (`FND_WFADMIN_NEW`) associated with the Workflow Administrator Web (New) responsibility. Similarly, the Workflow Self-Service Application menu is seeded on the Workflow User (New) menu (`FND_WFUSER_NEW`) associated with the Workflow User Web (New) responsibility.

## Migrating to Standard Access Functions

If your application used self-service functions to provide access to the previous version of the Workflow Monitor, you can migrate to the new Status Monitor by replacing the functions you previously called with the appropriate new functions. The following table shows the correspondence between functions for the previous Workflow Monitor and the standard access functions for the new Status Monitor.

### *Migrating to Standard Access Functions*

Previous Function	New Function
FND_FNDWFIAS (if called without any parameters)	WF_STATUS_MONITOR or WF_SS_STATUS_MONITOR

## Related Topics

Migrating to Guest Access Functions, page 5-32

## Guest Access

Guest Status Monitor access provides tightly coupled access from an Oracle Applications Framework-based Web page or Oracle E-Business Suite form, to a freestanding Status Monitor page for a particular workflow, without access to the rest of the Oracle Workflow application. In this mode, the specified Status Monitor page is displayed without the full Oracle Workflow menu, so that users cannot navigate out of the Status Monitor to other Oracle Workflow pages.

Guest access lets users navigate among the top-level Status Monitor pages, including the Activity History page in the Administrator Monitor or Notification History page in the Self-Service Monitor, Status Diagram page, Participant Responses page, and Workflow Details page. Users can also drill down from the top-level pages to related detail or action pages, such as navigating from the Notification History page to the Cancel page. Additionally, locator links, also known as breadcrumbs, let users navigate from the Status Monitor back to the calling application. However, users cannot navigate from the Status Monitor to other parts of Oracle Workflow.

With guest access, users are fully authenticated. However, in this mode you programmatically control which workflow process users can view and whether users can perform administrative operations in the Status Monitor, rather than having these privileges controlled by the workflow administrator setting in the Workflow Configuration page.

When you provide guest access to the Status Monitor from your application, you must specify a workflow item type and item key to automatically query. Guest access does not include search capabilities, so users can only view the workflow process you specify. You can choose to initially display the specified workflow in either the Activity History page in the Administrator Monitor or Notification History page in the Self-Service Monitor, the Status Diagram page, or the Participant Responses page. If you do not specify an initial page, the workflow is initially displayed in the Activity History page in the Administrator Monitor or Notification History page in the Self-Service Monitor.

**Note:** The workflow is only displayed if the specified item type, item key, and administrator mode are valid. Otherwise, an error message is displayed. The Workflow tabs are not displayed, so the user cannot navigate to any other part of Oracle Workflow.

You must also set the administrator mode to determine whether to grant the user privileges to perform administrative operations within the Status Monitor. You can choose one of the following options:

- Never grant administrator privileges, regardless of whether the user belongs to the workflow administrator role specified in the Workflow Configuration page. This option is the default if you do not specify an administrator mode.
- Always grant administrator privileges, regardless of whether the user belongs to the workflow administrator role specified in the Workflow Configuration page.
- Check whether the user belongs to the workflow administrator role specified in the Workflow Configuration page and grant administrator privileges accordingly.

## Guest Access in Java

Oracle Workflow provides Java methods to obtain URLs for guest access to the Status Monitor. These methods are defined in the Java class called `oracle.apps.fnd.wf.monitor.webui.Monitor`.

- *Monitor.redirectToGuestAdvUrl( )* - Redirects to the Administrator Monitor with guest access.
- *Monitor.redirectToGuestSimpleUrl( )* - Redirects to the Self-Service Monitor with guest access.
- *Monitor.getGuestAdvanceUrl( )* - Returns a URL for guest access to the Administrator Monitor, in a form that can be used within an Oracle Applications Framework application page. For example, you can set this URL as a destination link on an `OAWebBean`. The URL is returned in the following format:

```
/OA_HTML/OA.jsp?OAFunc=[parameters...]
```

- *Monitor.getGuestSimpleUrl( )* - Returns a URL for guest access to the Self-Service Monitor, in a form that can be used within an Oracle Applications Framework application page. For example, you can set this URL as a destination link on an `OAWebBean`. The URL is returned in the following format:

```
/OA_HTML/OA.jsp?OAFunc=[parameters...]
```

When calling these methods, you must provide the following parameters to indicate how you want to display the Status Monitor:

- `pageContext` - The `OAPageContext` of the calling page.
- `itemType` - The internal name of a workflow item type to automatically query in the Status Monitor.
- `itemKey` - An item key to automatically query in the Status Monitor.
- `adminMode` - Specify 'Y' to grant administrator privileges to the user accessing the Status Monitor, 'N' to withhold administrator privileges from the user, or 'U' to check whether the user belongs to the workflow administrator role specified in the Workflow Configuration page and grant administrator privileges accordingly. The default is 'N'.
- `firstPage` - The Status Monitor page that you want to initially display.
  - HISTORY - Activity History page in the Administrator Monitor or Notification History page in the Self-Service Monitor

- DIAGRAM - Status Diagram page
- RESPONSES - Participant Responses page

The default is HISTORY.

- retainCallingAM - Specify true or false to indicate whether the OAApplicationModule of the calling page should be retained while working in the Status Monitor. If you specify true, retainAM=Y is appended to the Status Monitor URL; if you specify false, retainAM=N is appended to the URL. The default is true.

All method calls for guest access should be made from within an Oracle Applications Framework-based Web page.

### Example

The following code excerpt shows an example of how to provide guest access to the Status Monitor in Java code. This example calls the *getGuestAdvanceUrl()* method in the `oracle.apps.fnd.wf.monitor.webui.Monitor` class.

```

/*****
 *
 **
 ** Guest Access
 **
 ** Assumes all method calls are made from within an Oracle
 ** Applications Framework page.
 **
 *****/

...
import oracle.apps.fnd.wf.monitor.webui.Monitor;
...

// This example assumes we want to set the destination link on
// an OA text bean. Following the link will take the user to the
// advanced monitor on the "Activity History" page.

public void processRequest(OAPageContext pageContext,
                          OAWebBean webBean)
{
    super.processRequest(pageContext, webBean);

    ...

    String itemType = [ however this value is obtained in page ]
;
    String itemKey = [ however this value is obtained in page ];
    String firstPage = "HISTORY";
    String returnToLabel = "Return to Application XYZ";

    // Set to "U" to have Monitor code figure out if the current
    // user should have Workflow Administrator privileges based
    // on the Administrator role designation in Workflow.

    String adminMode = "U";

    // Will add a parameter "retainAM=Y" to the resulting url
    // so the developer doesn't have to do this manually if he

```

```

        // wants to retain the calling Application Module when the
        // user navigates to the Status Monitor.

        boolean retainCallingAM = true;

        String url = null;

        try
        {
            url = Monitor.getGuestAdvanceUrl(pageContext, itemType,
                                            itemKey, adminMode, firstPage,
                                            returnToLabel, retainCallingAM);
        }
        catch (MonitorURLException me)
        {
            // Handle not being able to obtain a valid redirectUrl for
            // the parameters.
        }

        // Set the url string on the web bean.

        OASStaticStyledTextBean monitorLink =
            (OASStaticStyledTextBean)findIndexedChildRecursive
            ("AdvancedMonitorLink");
        monitorLink.setDestination(url);

        ...

    } // end processRequest()

```

## Guest Access in PL/SQL

Oracle Workflow also provides PL/SQL functions to obtain URLs for guest access to the Administrator Monitor. These functions are defined in the PL/SQL package called `WF_MONITOR`. See: *Workflow Monitor APIs, Oracle Workflow API Reference*.

- `WF_MONITOR.GetAdvancedEnvelopeURL( )` - Returns a complete URL for guest access to the Activity History page in the Administrator Monitor.
- `WF_MONITOR.GetDiagramURL( )` - Returns a complete URL for guest access to the Status Diagram page in the Administrator Monitor.
- `WF_MONITOR.GetEnvelopeURL( )` - Returns a complete URL for guest access to the Participant Responses page in the Administrator Monitor.

When calling these methods, you must provide the following parameters to indicate how you want to display the Status Monitor:

- `x_agent` - The base Web agent defined for Oracle Applications. Obtain this value from the `WF_RESOURCES` token named `WF_WEB_AGENT` by calling `WF_CORE.TRANSLATE('WF_WEB_AGENT')`. See: *TRANSLATE, Oracle Workflow API Reference*.
- `x_item_type` - The internal name of a workflow item type to automatically query in the Status Monitor.
- `x_item_key` - An item key to automatically query in the Status Monitor.

- `x_admin_mode` - Specify 'YES' to grant administrator privileges to the user accessing the Status Monitor, or 'NO' to withhold administrator privileges from the user. The default is 'NO'.

You can use these URLs to provide access to the Administrator Monitor from a PL/SQL application, for example, or include a URL in a workflow notification message to allow a user to access the Administrator Monitor from the notification.

**Note:** In Oracle E-Business Suite, you can call the function `FND_UTILITIES.OPEN_URL` to open a Web browser and have it connect to a specified URL, such as a Status Monitor URL. See: `FND_UTILITIES:Utility Routine`, *Oracle Applications Developer's Guide*.

## Guest Access from Notifications

You can provide guest access to the Administrator Monitor from a workflow notification. To do so, define a message attribute of type URL, and include or attach this attribute in the notification message. Obtain a guest access URL using one of the `WF_MONITOR` PL/SQL functions, and set the value of the message attribute to this URL. The user who receives the notification can access the Administrator Monitor by viewing the notification, either through the Worklist Web pages or through an e-mail application, and clicking the link in the message. If users are not already logged into Oracle Applications, they must first log in before they can access the Administrator Monitor from the link. See: *To Define a Message Attribute*, *Oracle Workflow Developer's Guide*.

## Guest Access from Oracle E-Business Suite Forms

You can provide guest access from an Oracle E-Business Suite application to the Status Monitor by using self-service functions. You can call these functions from an Oracle E-Business Suite form, or add the menus that contain the functions to another menu associated with another responsibility.

The following table lists the functions that provide guest access to the Status Monitor.

### Guest Access Functions

Function	Description
<code>WF_G_ACTIVITIES</code>	Displays the Activity History page for the specified workflow in the administrator version of the Status Monitor.
<code>WF_G_DIAGRAM</code>	Displays the Status Diagram page for the specified workflow in the administrator version of the Status Monitor.
<code>WF_SSG_ACTIVITIES</code>	Displays the Notification History page for the specified workflow in the self-service version of the Status Monitor.
<code>WF_SSG_DIAGRAM</code>	Displays the Status Diagram page for the specified workflow in the self-service version of the Status Monitor.



When you call one of the guest access functions, you must pass the function the following parameters:

- `itemType` - A valid workflow item type, determined by your application. The item type and item key together identify the workflow process to display. You must specify the same item type as you used to obtain the encrypted access key. You should use the `ICX_CALL.Encrypt()` function to encrypt this value.
- `itemKey` - A valid item key, determined by your application. The item type and item key together identify the workflow process to display. You must specify the same item key as you used to obtain the encrypted access key. You should use the `ICX_CALL.Encrypt()` API to encrypt this value.
- `wm` - The encrypted administrator mode that determines whether the user should have privileges to perform administrative operations in the Status Monitor. Call the PL/SQL function `WF_FWKMON.GetEncryptedAdminMode()` to obtain the encrypted value for the administrator mode you want, either Y or N. You must specify the same administrator mode value to encrypt as you used to obtain the encrypted access key. See: *GetEncryptedAdminMode, Oracle Workflow API Reference*.
- `wa` - An encrypted access key for a specified item type, item key, and administrator mode combination. Call the PL/SQL function `WF_FWKMON.GetEncryptedAccessKey()` to obtain this value for the item type, item key, and administrator mode you want. See: *GetEncryptedAccessKey, Oracle Workflow API Reference*.

**Note:** Because users are authenticated in guest access, you can call the PL/SQL function `WF_FWKMON.IsMonitorAdministrator()` to determine whether a the user has administrator privileges based on the workflow administrator setting in the Workflow Configuration page. If you use this function, you should use its result when obtaining both the encrypted access key and the encrypted administrator mode, in order to avoid a discrepancy between these two values. See: *IsMonitorAdministrator, Oracle Workflow API Reference*.

You can also choose to grant or withhold administrator privileges in the Status Monitor by specifying the administrator mode as Y or N, respectively, regardless of the workflow administrator setting in the Workflow Configuration page.

- `retainAM` - Specify Y or N to indicate whether the `OAAApplicationModule` of the calling page should be retained while working in the Status Monitor.
- `fExt` - An external flag used within Oracle Workflow. Set this parameter to X.

You can call the function `FND_FUNCTION.EXECUTE` to execute a guest access function specifying your parameters. See: *FND\_FUNCTION.EXECUTE, Oracle Applications Developer's Guide*.

**Note:** When you call `FND_FUNCTION.EXECUTE`, you should use the `WFA_HTML.conv_special_url_chars()` API to convert any special characters in the parameters you pass to the Status Monitor.

The following code example demonstrates how to execute the `WF_G_ACTIVITIES` function using `FND_FUNCTION.EXECUTE`.

```

itemType := icx_call.encrypt('<your_item_type>');

itemKey := icx_call.encrypt('<your_item_key>');

adminMode := wf_fwkmmon.isMonitorAdministrator('<user_name>');

wm := wf_fwkmmon.getEncryptedAdminMode(adminMode);

wa := wf_fwkmmon.getEncryptedAccessKey('<your_item_type>',
    '<your_item_key>', adminMode);

FND_FUNCTION.EXECUTE(
    FUNCTION_NAME => 'WF_G_ACTIVITIES',
    OPEN_FLAG => 'Y',
    SESSION_FLAG => 'Y',
    OTHER_PARAMS =>
        'itemType=' || (wfa_html.conv_special_url_chars(itemType))
        || '&' || 'itemKey=' || (wfa_html.conv_special_url_chars(itemKey))
        || '&' || 'wm=' || (wfa_html.conv_special_url_chars(wm))
        || '&' || 'wa=' || (wfa_html.conv_special_url_chars(wa))
        || '&' || 'retainAM=Y'
        || '&' || 'fExt=X'
    );

```

See: Overview of Form Development Steps, *Oracle Applications Developer's Guide* and Menus Window, *Oracle Applications Developer's Guide*.

## Menu Setup

If you use a guest access function within your responsibility, you must add the menu containing that function to the top-level menu for your responsibility. The WF\_G\_ACTIVITIES and WF\_G\_DIAGRAM functions are seeded on the Workflow Guest Monitor Application (WF\_G\_MONITOR\_APPLICATION) menu, and the WF\_SSG\_ACTIVITIES and WF\_SSG\_DIAGRAM functions are seeded on the Workflow Guest Self-Service Monitor Application (WF\_SSG\_MONITOR\_APPLICATION) menu.

**Note:** You cannot add the Status Monitor functions to your menu directly. To include these functions, you must add the Oracle Workflow menu that contains the function you want.

The Workflow Guest Monitor Application menu is seeded on the Workflow Administrator (New) menu (FND\_WFADMIN\_NEW) associated with the Workflow Administrator Web (New) responsibility. Similarly, the Workflow Guest Self-Service Monitor Application menu is seeded on the Workflow User (New) menu (FND\_WFUSER\_NEW) associated with the Workflow User Web (New) responsibility.

## Migrating to Guest Access Functions

If your application used self-service functions to provide access to the previous version of the Workflow Monitor, you can migrate to the new Status Monitor by replacing the functions you previously called with the appropriate new functions. The following table shows the correspondence between functions for the previous Workflow Monitor and the guest access functions for the new Status Monitor.

### ***Migrating to Guest Access Functions***

<b>Previous Function</b>	<b>New Function</b>
FND_WFMON_ADV	WF_G_ACTIVITIES
FND_WFMON_DIAGRAM	WF_G_DIAGRAM or WF_SSG_DIAGRAM
FND_FNDWFIAS (if called with the ITEM_TYPE, ITEM_KEY, ADMIN_MODE, and ACCESS_KEY parameters)	WF_SSG_ACTIVITIES

### **Related Topics**

Migrating to Standard Access Functions, page 5-26

## **Testing Status Monitor Access**

You can use the Workflow Monitor Test Application to test the monitor access you want to provide from your application. The Programmatic Access page simulates calls to obtain URLs for navigating from an Oracle Applications Framework-based Web page to a Status Monitor page or calls to redirect from an Oracle Applications Framework-based Web page to a Status Monitor page. You can retrieve a test URL or perform a trial redirection. The Programmatic Access page lets you test access to both the administrator and the self-service versions of the Status Monitor, using standard or guest access.

The Advanced Worklist page is also included in the Workflow Monitor Test Application to let you test access from a workflow notification to the Status Monitor. You can test links from notifications to the administrator version of the Status Monitor, using guest access. In the Worklist, navigate to a notification that contains a link to the Status Monitor, and select that link to test the access it provides. See: *To View Notifications from the Advanced Worklist, Oracle Workflow User's Guide*.

## **Menu Setup**

The Workflow Monitor Test Application is available for the version of Oracle Workflow embedded in Oracle Applications, but it is not seeded on any Oracle Applications menu. Before you can use this module, your system administrator must add its menu to a top-level menu for a responsibility. The menu for the Workflow Monitor Test Application module is named Workflow Monitor Test Application (WFMON\_TEST\_APPLICATION). For example, you can add this menu to the Workflow Administrator (New) menu (FND\_WFADMIN\_NEW), which is associated with the Workflow Administrator Web (New) responsibility, or to the Workflow User (New) menu (FND\_WFUSER\_NEW), which is associated with the Workflow User Web (New) responsibility.

Additionally, when you navigate from the Workflow Monitor Test Application module to the Status Monitor using standard or guest access, you must perform the navigation from within a responsibility that also includes the menu for the Status Monitor version and access option you want to test. Otherwise, you will encounter function security errors. To avoid these errors, ensure that the appropriate Oracle Workflow menus are added to the same top-level menu as the WFMON\_TEST\_APPLICATION menu.

The menus for the Status Monitor are:

- Workflow Administrator Application (WF\_ADMINISTRATOR\_APPLICATION)  
- Required for standard access to the Administrator Monitor
- Workflow Guest Monitor Application (WF\_G\_MONITOR\_APPLICATION)  
- Required for guest access to the Administrator Monitor
- Workflow Self-Service Application (WF\_SELF\_SERVICE\_APPLICATION) - Required for standard access to the Self-Service Monitor
- Workflow Guest Self-Service Monitor Application (WF\_SSG\_MONITOR\_APPLICATION) - Required for guest access to the Self-Service Monitor

**Note:** The Workflow Administrator (New) menu includes the Workflow Administrator Application and Workflow Guest Monitor Application menus by default. Additionally, the Workflow User (New) menu includes the Workflow Self-Service Application and Workflow Guest Self-Service Monitor Application menus by default.

1. Testing Standard Access, page 5-34
2. Testing Guest Access, page 5-36

## Related Topics

Accessing the Administrator Monitor, page 5-10

Accessing the Self-Service Monitor, *Oracle Workflow User's Guide*

Overview of Function Security, *Oracle Applications System Administrator's Guide*

Overview of Menus and Function Security, *Oracle Applications Developer's Guide*

## Testing Standard Access

You can test standard access from an Oracle Applications Framework-based Web page to the Status Monitor in the Programmatic Access page. Standard access provides loosely coupled access to a Status Monitor page within the full Oracle Workflow application.

### To Test Standard Access:

1. Use a Web browser to log on to a responsibility specified by your system administrator and choose the Programmatic Access link.
2. Select the Test "Standard" Access link.
3. In the Test "Standard" Access region, enter the test options you want. Each option corresponds to a method parameter for the method in the `oracle.apps.fnd.wf.monitor.webui.Monitor` class that is being simulated. See: Standard Access in Java, page 5-24.

The test options include:

- Item Type - Optionally enter the internal name of a workflow item type to automatically query in the Status Monitor.
- Item Key - Optionally enter an item key to automatically query in the Status Monitor.
- First Page - Specify the Status Monitor page that you want to initially display.

- MAIN - Main Workflows search page
- HISTORY - Activity History page in the Administrator Monitor or Notification History page in the Self-Service Monitor
- DIAGRAM - Status Diagram page
- RESPONSES - Participant Responses page

**Note:** For access to the HISTORY, DIAGRAM, or RESPONSES pages, you must specify an item type and item key. If you specify an item type and item key but do not specify a first page, the First Page option defaults to HISTORY.

- Retain Calling AM - Specify `true` or `false` to indicate whether to retain the calling application module when calling a Get URL method. If you enter `true`, `retainAM=Y` is appended to the URL; if you enter `false`, `retainAM=N` is appended to the URL.
4. Select the test action you want to perform.

- Get Advanced Monitor URL - Corresponds to a call to the Java method *Monitor.getAdvanceUrl()*. This call returns a URL for the Administrator Monitor page specified by the test options in the following format, suitable for use within an Oracle Applications Framework application page:

```
/OA_HTML/OA.jsp?OAFunc=[parameters...]
```

For example, you can set this URL as a destination link on an `OAWebBean` using the call `<OAFrameworkBean>.setDestination(String url)`.

The parameter `retainAM=Y` or `retainAM=N` is appended to the URL depending on the value you specified for the Retain Calling AM option.

When you perform this action, Oracle Workflow retrieves a URL according to the test options using *Monitor.getAdvanceUrl()* and displays that URL as a hyperlink in a text message bean. To navigate to the Status Monitor, select the link.

- Get Simple Monitor URL - Corresponds to a call to the Java method *Monitor.getSimpleUrl()*. This call returns a URL for the Self-Service Monitor page specified by the test options in the following format, suitable for use within an Oracle Applications Framework application page:

```
/OA_HTML/OA.jsp?OAFunc=[parameters...]
```

For example, you can set this URL as a destination link on an `OAWebBean` using the call `<OAFrameworkBean>.setDestination(String url)`.

The parameter `retainAM=Y` or `retainAM=N` is appended to the URL depending on the value you specified for the Retain Calling AM option.

When you perform this action, Oracle Workflow retrieves a URL according to the test options using *Monitor.getSimpleUrl()* and displays that URL as a hyperlink in a text message bean. To navigate to the Status Monitor, select the link.

- Redirect to Advanced Monitor - Corresponds to a call to the Java method *Monitor.redirectToAdvanceUrl()*. When you perform this action, Oracle Workflow redirects you to the Status Monitor as specified by the test options.

- Redirect to Simple Monitor - Corresponds to a call to the Java method *Monitor.redirectToSimpleUrl()*. When you perform this action, Oracle Workflow redirects you to the Status Monitor as specified by the test options.
5. Select the Perform "Standard" Action button.

## Testing Guest Access

You can test guest access from an Oracle Applications Framework-based Web page to the Status Monitor in the Programmatic Access page. Guest access provides tightly coupled access to a freestanding Status Monitor page for a particular workflow, without access to the rest of the Oracle Workflow application.

### To Test Guest Access:

1. Use a Web browser to log on to a responsibility specified by your system administrator and choose the Programmatic Access link.
2. Select the Test "Guest" Access link.
3. In the Test "Guest" Access region, enter the test options you want. Each option corresponds to a method parameter for the method in the `oracle.apps.fnd.wf.monitor.webui.Monitor` class that is being simulated. See: Guest Access in Java, page 5-27.

The test options include:

- Item Type - Enter the internal name of the workflow item type to automatically query in the Status Monitor.
- Item Key - Enter the item key to automatically query in the Status Monitor.
- First Page - Specify the Status Monitor page that you want to initially display.
  - HISTORY - Activity History page in the Administrator Monitor or Notification History page in the Self-Service Monitor
  - DIAGRAM - Status Diagram page
  - RESPONSES - Participant Responses page

If you leave the First Page field blank, this option defaults to HISTORY.

- Retain Calling AM - Specify `true` or `false` to indicate whether to retain the calling application module when calling a Get URL method. If you enter `true`, `retainAM=Y` is appended to the URL; if you enter `false`, `retainAM=N` is appended to the URL.
- Administrator Mode - Specify a value to indicate whether the user should have privileges to perform administrative operations when accessing the Status Monitor.
  - Y - The user is granted administrator privileges, regardless of whether the user belongs to the workflow administrator role or not.
  - N - The user is not granted administrator privileges, regardless of whether the user belongs to the workflow administrator role or not.
  - U - Oracle Workflow checks whether the user belongs to the workflow administrator role as specified in the Workflow Configuration page and grants administrator privileges accordingly.

If you leave the Administrator Mode field blank, this option defaults to N.

4. Select the test action you want to perform.

- Get Advanced Monitor URL - Corresponds to a call to the Java method *Monitor.getGuestAdvanceUrl()*. This call returns a URL for the Administrator Monitor page specified by the test options in the following format, suitable for use within an Oracle Applications Framework application page:

```
/OA_HTML/OA.jsp?OAFunc=[parameters...]
```

For example, you can set this URL as a destination link on an `OAWebBean` using the call `<OAFrameworkBean>.setDestination(String url)`.

The parameter `retainAM=Y` or `retainAM=N` is appended to the URL depending on the value you specified for the Retain Calling AM option.

When you perform this action, Oracle Workflow retrieves a URL according to the test options using *Monitor.getGuestAdvanceUrl()* and displays that URL as a hyperlink in a text message bean. To navigate to the Status Monitor, select the link.

- Get Simple Monitor URL - Corresponds to a call to the Java method *Monitor.getGuestSimpleUrl()*. This call returns a URL for the Self-Service Monitor page specified by the test options in the following format, suitable for use within an Oracle Applications Framework application page:

```
/OA_HTML/OA.jsp?OAFunc=[parameters...]
```

For example, you can set this URL as a destination link on an `OAWebBean` using the call `<OAFrameworkBean>.setDestination(String url)`.

The parameter `retainAM=Y` or `retainAM=N` is appended to the URL depending on the value you specified for the Retain Calling AM option.

When you perform this action, Oracle Workflow retrieves a URL according to the test options using *Monitor.getGuestSimpleUrl()* and displays that URL as a hyperlink in a text message bean. To navigate to the Status Monitor, select the link.

- Redirect to Advanced Monitor - Corresponds to a call to the Java method *Monitor.redirectToGuestAdvUrl()*. When you perform this action, Oracle Workflow redirects you to the Status Monitor as specified by the test options.
- Redirect to Simple Monitor - Corresponds to a call to the Java method *Monitor.redirectToGuestSimpleUrl()*. When you perform this action, Oracle Workflow redirects you to the Status Monitor as specified by the test options.

5. Select the Perform "Guest" Action button.

## Status Monitor Portlets

Oracle Workflow provides two Status Monitor portlets that you can add to an Oracle Portal page to view summaries of workflow status information. The Error Workflows portlet provides administrator information about errored workflows, while the Workflows portlet provides self-service information about workflows owned by a user.

## Adding a Portlet to an Oracle Portal Page

Before you can add an Oracle Applications Framework portlet to an Oracle Portal page, your system administrator must assign you a responsibility that includes the menu function for that portlet on its menu. The Error Workflows portlet is seeded in the Workflow Administrator Web (New) responsibility, and the Workflows portlet is seeded in the Workflow User Web (New) responsibility. The system administrator may assign you either one of these responsibilities or another responsibility to which the appropriate portlet has been added.

After a responsibility that includes an Oracle Workflow portlet has been assigned to you, you can use Oracle Portal to add that portlet to an Oracle Portal page. In the Portlet Repository, select *Oracle Applications Framework Provider* under *Other Providers* to access the Oracle Workflow portlets. For more information, please refer to the Oracle Portal online help, or see: *Adding a Portlet to a Page, Oracle Application Server Portal Tutorial*.

## Error Workflows Portlet

The Error Workflows portlet provides administrator information about errored workflows. The portlet displays all errored workflows started within the last week. If you have workflow administrator privileges, the list shows workflows owned by any user; if you do not have workflow administrator privileges, the list shows only workflows that you own. You can select the item key link in the Item Key column to view the activity history for a workflow in the Activity History page of the Administrator Monitor.

### Obtaining Access to the Error Workflows Portlet

The menu function for the Error Workflows portlet is `WF_ADMIN_STATUS_PORTLET`. This function is seeded on the Workflow Administrator (New) menu (`FND_WFADMIN_NEW`), which is associated with the Workflow Administrator Web (New) responsibility. To give you access to the Error Workflows portlet, your system administrator must perform one of the following steps:

- Assign you the Workflow Administrator Web (New) responsibility
- Add the `FND_WFADMIN_NEW` menu to the menu for another existing or custom responsibility and assign you that responsibility
- Add the `WF_ADMIN_STATUS_PORTLET` function to another existing or custom menu, associate that menu with a responsibility, and assign you that responsibility

## Workflows Portlet

The Workflows portlet provides self-service information about workflows that you own. The portlet displays all workflows owned by you that were started within the last two weeks. You can select the workflow identifier link in the Workflow column to view the notification history for a workflow in the Notification History page of the Self-Service Monitor. The workflow identifier is the user key if one is specified for the workflow, or the item key if no user key is specified.

### Obtaining Access to the Workflows Portlet

The menu function for the Workflows portlet is `WF_SS_STATUS_PORTLET`. This function is seeded on the Workflow User (New) menu (`FND_WFUSER_NEW`), which is associated with the Workflow User Web (New) responsibility. To give you access



to the Error Workflows portlet, your system administrator must perform one of the following steps:

- Assign you the Workflow User Web (New) responsibility
- Add the FND\_WFUSER\_NEW menu to the menu for another existing or custom responsibility and assign you that responsibility
- Add the WF\_SS\_STATUS\_PORTLET function to another existing or custom menu, associate that menu with a responsibility, and assign you that responsibility



---

## Oracle Workflow Loaders

This chapter describes access protection for workflow object definitions and how to load those definitions between a database and a flat file.

This chapter covers the following topics:

- Overview of Oracle Workflow Access Protection
- Access Protection for Business Event System Data
- Using the Workflow Definitions Loader
- Using the Workflow XML Loader

### Overview of Oracle Workflow Access Protection

Access protection is a feature that prevents workflow seed data created by a 'seed data provider' from being modified by a 'seed data consumer'. Here, a 'seed data provider' is any organization that creates 'seed data' for other organizations ('seed data consumers') to use in defining and customizing a workflow process. In Oracle Workflow, seed data refers to either of the following:

- Workflow object definitions that can and should be customized to meet a certain consumer's needs.
- Workflow object definitions protected against customization because they represent standards that may also be upgraded in the future by the provider.

For example, the Oracle Workflow development team is a provider of seed data called the Standard item type. The Standard item type contains standard activities that can be dropped into any custom workflow process. The development team at your organization's headquarters may create a custom workflow process definition that references activities from the Standard item type. This makes the headquarters team a consumer of the Standard item type seed data.

Now suppose the headquarters team wants to deploy the custom workflow definition that it created to teams at other regional offices. The headquarters team, as seed data providers, may want to do the following:

- Identify certain workflow objects in its custom workflow definition as corporate standards that the regional teams should adhere to and not modify.
- Designate certain objects in its deployed process as customizable for the regional offices to alter to their offices' needs.

The headquarters team can satisfy both requirement using the access protection feature in Oracle Workflow. Access protection lets seed data providers protect certain data

as 'read-only', while allowing other data to be customized. Also during a seed data upgrade, access protection lets the seed data provider overwrite any existing protected seed data with new versions of that seed data, while preserving any customizations made to customizable seed data.

Oracle Workflow assigns a protection and customization level to every workflow object definition stored in the database and requires every user of Oracle Workflow to operate at a certain access level. The combination of protection, customization, and access levels makes up the access protection feature and determines whether a user can modify a given workflow object. The level, in all three cases, is a numeric value ranging from 0 to 1000 that indicates the relationship between different organizations as providers and consumers of seed data.

The following range of levels are presumed by Oracle Workflow:

**0-9**

Oracle Workflow

**10-19**

Oracle Application Object Library

**20-99**

Oracle Applications development

**100-999**

Customer organization. You can determine how you want this range to be interpreted. For example, 100 can represent headquarters, while 101 can represent a regional office, and so on.

**1000**

Public

## Access Level

Each user of Oracle Workflow operates the system at a certain access level according to the range of levels listed above. A "user of Oracle Workflow" in this case, represents someone who is operating Oracle Workflow Builder, or the Workflow Definitions Loader program, which loads workflow process definitions from a file into a database. As a seed data provider, you should always operate Oracle Workflow Builder at the same consistent access level because the level you work at affects the protection level of the seed data you create.

You can view your access level as follows:

- In Oracle Workflow Builder, select About Workflow from the Help menu.
- If you are going to run the Workflow Definitions Loader program to download workflow process definitions from the database to a file, check the value for the environment variable `WF_ACCESS_LEVEL` on your workflow server. See: Using the Workflow Definitions Loader, page 6-7.

**Note:** The Workflow Definitions Loader program references the access level stored in the environment variable called `WF_ACCESS_LEVEL`, which you must define when you install Oracle Workflow on your server. If you do not define this environment variable, the Workflow Definitions Loader simply assumes a default access level of 1.

When you install the version of Oracle Workflow embedded in Oracle Applications, you need to define this variable in an environment file. The default environment file is APPLSYS.env. If you do not define this environment variable, the Workflow Definitions Loader simply assumes a default access level of 1. Refer to your Oracle Applications installation manual for more information about environment files.

## Protection Level

Whenever you create a workflow object in Oracle Workflow Builder, you have the option of protecting the object at a certain level. An object's protection level helps control whether other users can modify the object based on their access levels, by allowing only users with an access level equal to or lower than the object's protection level to modify the object.

**Note:** The range of access levels allowed to modify the object may be further restricted by the object's customization level.

To set the protection level of an object, display the Access tab of the object's property page and either check or clear the Lock at this Access Level check box. The protection level that you set for an object is dependent on the setting of the Lock at this Access Level check box and on your current access level.

- If you check the Lock at this Access Level check box, the protection level for the object is set to your current access level. Users with an access level higher than your current access level will not be able to modify the object. These users will see a small lock on the workflow object's icon, indicating that the object can be used but not modified. For users with an access level equal to or lower than your current access level, the customization level for the object will determine whether they can modify the object.
- If you do not check the Lock at this Access Level check box, the protection level for the object is set to 1000. In this case all users who are not restricted by the customization level can modify the object.

## Customization Level

Every workflow object, in addition to having a protection level, also records a customization level when you modify the object and save it to a database or file. An object's customization level helps control whether other users can modify the object based on their access levels, by allowing only users with an access level equal to or higher than the object's customization level to modify the object.

**Note:** The range of access levels allowed to modify the object may be further restricted by the object's protection level.

Setting the customization level ensures that a customizable object that has been customized never gets overwritten during a seed data upgrade, because the upgrade always occurs with the Workflow Definitions Loader operating at an access level below the customized object's customization level.

To set the customization level of an object, display the Access tab of the object's property page and either check or clear the Preserve Customizations check box. The customization

level that you set for an object is dependent on the setting of the Preserve Customizations check box and on your current access level.

- If you check the Preserve Customizations check box, the customization level for the object is set to your current access level. Users with an access level lower than your current access level will not be able to modify the object. These users will see a small lock on the workflow object's icon, indicating that the object can be used but not modified. For users with an access level equal to or lower than your current access level, the protection level for the object will determine whether they can modify the object.
- If you do not check the Preserve Customizations check box, the customization level for the object is set to 0. In this case all users who are not restricted by the protection level can modify the object.

## Combining Protection and Customization Levels to Control Access

You control access to an object by the combined settings of the protection level and the customization level. You can set the Preserve Customizations and Lock at this Access Level check boxes for an object in one of four ways to specify the type of access you want to allow:

- **Allow access to everyone** - By default, all users are allowed access to an object if the Preserve Customizations and the Lock at this Access Level check box are both not checked. That is, the protection level is 1000 and the customization level is 0.
- **Limit access to users with access levels equal to your own or higher** - If you check the Preserve Customizations check box but do not check the Lock at this Access Level check box, you designate the object as being customizable by anyone with an access level equal to or higher than your current access level. However, users with a lower access level will not be able to modify the object. That is, the protection level is 1000 and the customization level is your current access level. You should only mark objects as customizable in this way if you are sure that you will not be providing upgraded versions of this object in the future that would overwrite other users' customizations to it.
- **Limit access to users with access levels equal to your own or lower** - If you check the Lock at this Access Level check box but do not check the Preserve Customizations check box, you protect the object and ensure that the object can only be modified by users with an access level equal to or lower than your current access level. Users with a higher access level will not be able to modify the object. That is, the protection level is your current access level and the customization level is 0. Protect any objects that you want to define as standard components that will not change unless you provide a global upgrade. For this reason, it is important that you always operate at the same consistent access level.
- **Limit access to users with access levels equal to your own** - If you check both the Lock at this Level and Preserve Customizations check boxes, you ensure that the object cannot be modified by anyone other than users operating at your current access level. That is, the protection level and customization level are both set to your current access level.

The following table summarizes which access levels can access an object under different settings of the Preserve Customizations and Lock at this Access Level options.

### ***Object Access Under Combined Customization and Protection Levels***

<b>Preserve Customizations</b>	<b>Lock at this Access Level</b>	<b>Access Level Applied to Object</b>
Cleared	Cleared	Object may be updated by any access level.
Checked	Cleared	Object may only be updated by users with access levels equal to or higher than your current access level.
Cleared	Checked	Object may only be updated by users with access levels equal to or lower than your current access level.
Checked	Checked	Object cannot be updated by any access level except for your current access level.

**Important:** If you have installed the beta version of Microsoft's Internet Explorer on your PC, which automatically installs an early version of a file called *comctl32.dll*, you may not see the lock icons appear on the locked objects in Oracle Workflow Builder. To correct this problem, install the production version of Microsoft's Internet Explorer to replace *comctl32.dll* with the latest copy.

The protection and access levels in Oracle Workflow are present to remind you that certain workflow objects should not be modified or should only be modified by someone accessing the tool at an authorized access level. This feature is not intended as a means of securing or source controlling your workflow objects.

**Important:** Most workflow objects provided by Oracle Workflow have a protection level of 0, which means the objects can only be modified by the Oracle Workflow team, operating at an access level of 0. If you attempt to alter your access level to 0 and modify the data anyway, your customizations will not be supported, especially if Oracle Workflow provides an upgrade to the seed data that may overwrite the modifications you make to the originally protected data.

See: To Set the Access Level for an Object, *Oracle Workflow Developer's Guide*.

## **Setting Up a Default Access Level**

When you install Oracle Workflow Builder on a Windows PC, Oracle Universal Installer assigns a default access level that is global to the PC and the operating system you are installing on. After installing Oracle Workflow Builder, you can have individual users on the PC change their access level to a new setting which overrides the default access level set for the PC. If a user does not define an access level, Oracle Workflow Builder assumes the value of the default access level for the PC. The access levels are stored in the Microsoft Windows registry.

If you are deploying Oracle Workflow Builder and workflow seed data to users in other parts of your organization, and you wish to discourage those users from modifying the

seed data that you provide, you can have them operate Oracle Workflow Builder at an access level that is higher than the data's protection level. For example if you, as a seed data provider, are operating at an access level of 100 and the seed data you create is protected at a level of 100, then you should require the access level for your users or seed data consumers to be 101 or higher.

You can set a user's access level in Oracle Workflow Builder by having them choose *About Oracle Workflow Builder...* from the Help menu. In the About Oracle Workflow Builder window, change the Access Level field to a number higher than your seed data protection level, then choose OK.

You can also set the access level directly in the Microsoft Windows registry by using a registry editor such as `regedit` to edit the decimal value under `HKEY_LOCAL_MACHINE\SOFTWARE\ORACLE\Workflow\Level`.

For the Workflow Definitions Loader program, you set the default access level that the program operates at for downloading process definitions to a file, by defining an environment variable called `WF_ACCESS_LEVEL` and setting its value using the appropriate operating system command.

**Caution:** Although you can modify your access level, Oracle Workflow does not support any customizations to seed data originally protected at a level 99 or lower. We **STRONGLY RECOMMEND** that you not change your access level to an unauthorized level for modifying protected data.

## Access Protection for Business Event System Data

Oracle Workflow also provides access protection for business event and event subscription definitions, in order to protect Oracle seed data and preserve your customizations in an upgrade. In the Business Event System, access protection is based on a customization level assigned to each event and subscription. The customization level determines who can update the event or subscription definition.

An event or subscription can have one of the following customization levels:

- **Core** - This level is used only for events and subscriptions seeded by Oracle. At this level, you cannot make any changes to the event or subscription definition. However, any property in the definition can be changed by an Oracle seed data upgrade.
- **Limit** - This level is used only for events and subscriptions seeded by Oracle. At this level, you can update the event or subscription status to Enabled or Disabled, but you cannot make any other changes to the object definition. Conversely, an Oracle seed data upgrade cannot change the status setting, but can change any other property in the definition.
- **User** - This level is automatically set for events and subscriptions that you define. At this level, you can change any property in the event or subscription definition. However, an Oracle seed data upgrade cannot make any changes in the definition.

During an Oracle Workflow or Oracle Applications seed data upgrade, the Workflow XML Loader loads Business Event System object definitions in normal upload mode, preserving any customized data according to these customization levels. See: *Using the Workflow XML Loader*, page 6-11.



## Related Topics

Events (for standalone Oracle Workflow), *Oracle Workflow Developer's Guide*

Events (for Oracle Applications), *Oracle Workflow Developer's Guide*

Event Subscriptions (for standalone Oracle Workflow), *Oracle Workflow Developer's Guide*

Event Subscriptions (for Oracle Applications), *Oracle Workflow Developer's Guide*

## Using the Workflow Definitions Loader

Rather than use the File Save or File Open menu options in Oracle Workflow Builder, you can also run a program called Workflow Definitions Loader to save or load process definitions from a database or flat file.

Before you upgrade your database, you can use the Workflow Definitions Loader to preserve and back up your process definitions to a flat file. After the database upgrade is complete, you can use the Loader program again to upload the definitions back into your database if you need to reload your saved definitions for any reason. You can also use the Loader program to upgrade your database with a newer version of a process definition or to transfer process definitions to other databases.

When you upload or upgrade a process definition, the Workflow Definitions Loader automatically validates the process definition to ensure that it conforms to specific process design rules. It performs the same validation as the Oracle Workflow Builder Verify feature. See: To Validate a Process Definition, *Oracle Workflow Developer's Guide*.

The standalone version of Oracle Workflow provides scripts to run the Workflow Definitions Loader. In Oracle Applications, run the Workflow Definitions Loader as a concurrent program.

**Note:** When you upload or upgrade a workflow definition onto an existing definition in a database, it is possible that an object in the upload/upgrade definition has a Display Name that is already in use by a different object in the target database. If this occurs, the Workflow Definitions Loader automatically resolves the display name conflict by adding a '@' character to the beginning of conflicting display names in the target database. The upload/upgrade definition is then applied as is and a warning message is generated.

**Note:** In standalone Oracle Workflow you can use the Workflow Definitions Loader Release 2.6.4 to upload and download process definitions from the Release 2.6.4, Release 2.6.3, Release 2.6.2, Release 2.6.1, base Release 2.6, and Release 2.5 versions of the Oracle Workflow server. In Oracle Applications you can use the Workflow Definitions Loader Release 2.6.3 to upload and download process definitions from all versions of the Oracle Workflow server embedded in Oracle Applications Release 11i. However, when you use the Workflow Definitions Loader to upload process definitions to an earlier Oracle Workflow server version, those processes cannot include any new features introduced in later releases. For more details about which features you must not use with earlier versions, see: Using Oracle Workflow Builder with Different Server Versions, *Oracle Workflow Developer's Guide*.

## To run the Workflow Definitions Loader for the standalone version of Oracle Workflow:

To run the Workflow Definitions Loader, run the `wftload.sh` script on UNIX or the `wftload.bat` script on Windows. These scripts are located in the `ORACLE_HOME/wf/admin` directory. Enter the following command at your operating system prompt.

- On Unix:

```
wftload.sh /mode [upload | forceupload | download]
[/effectivedate <date>] /user <user> /connectstring
<connectstring> /filename <filename> [/debug true]
/language <languagecode> [/itemtype <itemtype>]
```

- On Windows:

```
wftload.bat /mode [upload | forceupload | download]
[/effectivedate <date>] /user <user> /connectstring
<connectstring> /filename <filename> [/debug true]
/language <languagecode> [/itemtype <itemtype>]
```

Specify the following parameters for the script:

- `/mode` - Specify the mode in which to run the Workflow Definitions Loader.
  - `upload` - Use this mode to upload process definitions from an input file to a database.

This mode is useful when developing a new workflow process or applying a seed data upgrade to a database from an input file. The Workflow Definitions Loader uses the access level specified in the input file. It overwrites any objects protected at a level equal to or above the input file's access level, but preserves any customizations made to customizable seed data in the database.
  - `forceupload` - Use this mode to force an upload of the process definitions from an input file to a database regardless of an object's protection level.

When using `forceupload` mode, you should be certain that the process definition in the file is correct, because it overwrites the entire process stored in the database. The `forceupload` mode is useful for fixing data integrity problems in a database with a known, reliable file backup. This mode is also useful for loading process definition files from Oracle Workflow Release 1.0 or 1.0.1, which reflect an older data model.

**Note:** When using the `forceupload` mode to load a process definition file from Oracle Workflow Release 1.0 or 1.0.1 into a database, you must also complete a manual step once the definition is loaded. You must associate the lookup types that you load with an item type. To do this, in the Navigator window of Oracle Workflow Builder, drag the lookup types from the independent Lookup Types branch to a Lookup Types branch associated with an item type.

- `download` - Use this mode to download the process definition of one or more item types from a database to an output file.

When you download a process definition, the Workflow Definitions Loader sets the output file's access level to the value stored in the `WF_ACCESS_LEVEL` environment variable.

- `/effectivedate` - For download mode only, optionally include this parameter to specify the effective date of the process definition you want to download. Specify the date in the following format: YYYY/MM/DD HH24:MI:SS. If you do not include this parameter, the Workflow Definitions Loader downloads the process definition that is currently in effect.
- `/user` - Specify the user name of your Oracle Workflow database account.
- `/connectstring` - Specify the Oracle Net connect string for the database.
- `/filename` - Specify the full path and name of the input file from which you want to upload or the output file to which you want to download. Workflow definition files must have the extension `.wft`.
- `/debug` - Optionally include this parameter with the value `true` to report more extensive debugging information in the program output.
- `/language` - For download mode only, specify the language of the definitions to download, using a language abbreviation supported by the Oracle Database. For example, specify `JA` for Japanese. See: *Locale Data, Oracle Database Globalization Support Guide*.

Do not include this parameter in upload or forceupload mode. For uploads, the Workflow Definitions Loader uses the language specified within the input file.

- `/itemtype` - For download mode only, optionally include this parameter to specify the internal name of a particular item type that you want to download. You can include this parameter multiple times to specify multiple item types. For example:

```
/itemtype <item type1> /itemtype <item type2>
```

If you do not include this parameter for download mode, the Workflow Definitions Loader downloads all item types.

Do not include this parameter in upload or forceupload mode. The Workflow Definitions Loader uploads all item types specified within the input file.

After starting, the Workflow Definitions Loader prompts you to enter the password for your Oracle Workflow database account.

### Example

The following command shows an example of how to upload a process definition on Windows.

```
wftload.bat /mode upload /user OWF_MGR /connectstring
"(DESCRIPTION=(ADDRESS=(PROTOCOL=TCP) (HOST=wfhost.oracle.com)
(PORT=1521)) (CONNECT_DATA=(SERVER=DEDICATED)
(SERVICE_NAME=orawf)))" /filename
D:\Oracle\wf\res\US\wfstd.wft
```

The following command shows an example of how to download process definitions on Windows.

```
wftload.bat /mode download /user OWF_MGR /connectstring
"(DESCRIPTION=(ADDRESS=(PROTOCOL=TCP) (HOST=wfhost.oracle.com)
(PORT=1521)) (CONNECT_DATA=(SERVER=DEDICATED)
(SERVICE_NAME=orawf)))" /language ZHT /filename
D:\Temp\newtest.wft /itemtype WFSTD /itemtype WFPING
```

### To run the Workflow Definitions Loader for the version of Oracle Workflow embedded in Oracle Applications:

1. Navigate to the Submit Requests form in Oracle Applications to submit the Workflow Definitions Loader concurrent program. When you install and set up Oracle Applications and Oracle Workflow, your system administrator needs to add this concurrent program to a request security group for the responsibility that you want to run this program from. See: Overview of Concurrent Programs and Requests, *Oracle Applications System Administrator's Guide*.
2. Submit the Workflow Definitions Loader concurrent program as a request. See: Running Reports and Programs, *Oracle Applications User's Guide*.
3. In the Parameters window, enter values for the following parameters:

#### Mode

- Specify "Download" to download a process definition from the database to a flat file.
- Specify "Upgrade" to apply a seed data upgrade to a database from an input file. The Workflow Definitions Loader assumes the access level of the file's creator (seed data provider) and overwrites any objects protected at a level equal to or above the upgrade file's access level. The Loader program preserves any customizations made to customizable seed data in the database.
- Specify "Upload" to load a process definition from a flat file into the database. The upload mode is useful to someone who is developing a workflow process. It allows the developer to save definitions to the database without concern that accidental customizations to existing objects might prevent the upload of some process definition elements. The Workflow Definitions Loader uses the access level defined by the input file to upload the process definitions from the file and therefore will overwrite objects in the database that are protected at a level equal to or higher than that file's access level.
- Specify "Force" to force an upload of the process definitions from an input file to a database regardless of an object's protection level. You should be certain that the process definition in the file is correct as it overwrites the entire process stored in the database. The Force mode is useful for fixing data integrity problems in a database with a known, reliable file backup.

#### File

Specify the full path and name of the file that you want to download a process definition to, or upgrade or upload a process definition from.

#### Item Type

If you set Mode to "Download", use the List button to choose the item type for the process definition you want to download.

**Note:** When you submit the Workflow Definitions Loader from the Submit Requests form to download process definitions to a file, you can only specify to download one item type at a time. If you wish to download multiple or all item types simultaneously, you should submit the Workflow Definitions Loader concurrent program from the command line. See Step 6, page 6-11 below for details.

4. Choose OK to close the Parameters window.

5. When you finish modifying the print and run options for this request, choose Submit to submit the request.
6. Rather than use the Submit Requests form, you can also run the Workflow Definitions Loader concurrent program from the command line by entering the following commands:

- To upgrade:

```
WFLOAD apps/pwd 0 Y UPGRADE file.wft
```

- To upload:

```
WFLOAD apps/pwd 0 Y UPLOAD file.wft
```

- To force:

```
WFLOAD apps/pwd 0 Y FORCE file.wft
```

- To download:

```
WFLOAD apps/pwd 0 Y DOWNLOADfile.wft ITEMYPE1  
[ITEMYPE2 ...ITEMYPEN]
```

Replace *apps/pwd* with username and password to the APPS schema, replace *file.wft* with the file specification of a workflow process definition file, and replace *ITEMYPE1*, *ITEMYPE2*, ... *ITEMYPEN* with the one or more item type(s) you want to download. You can also download all item types simultaneously by replacing *ITEMYPE1* with '\*' (make sure you enclose the asterisk in single quotes).

A file specification is specified as:

```
@<application_short_name>:[<dir>/.../]file.ext
```

or

```
<native path>
```

## Related Topics

Overview of Oracle Workflow Access Protection, page 6-1

## Using the Workflow XML Loader

The Workflow XML Loader is a command line utility that lets you upload and download XML definitions for Business Event System objects between a database and a flat file. When you download Business Event System object definitions from a database, Oracle Workflow saves the definitions as an XML file. When you upload object definitions to a database, Oracle Workflow loads the definitions from the source XML file into the Business Event System tables in the database, creating new definitions or updating existing definitions as necessary.

The XML definitions for Business Event System objects are structured according to the following document type definitions (DTDs):

- Events - WF\_EVENTS DTD, *Oracle Workflow API Reference*
- Event group members - WF\_EVENT\_GROUPS DTD, *Oracle Workflow API Reference*

- Event subscriptions - WF\_EVENT\_SUBSCRIPTIONS DTD, *Oracle Workflow API Reference*
- Systems - WF\_SYSTEMS DTD, *Oracle Workflow API Reference*
- Agents - WF\_AGENTS DTD, *Oracle Workflow API Reference*
- Agent group members - WF\_AGENT\_GROUPS DTD, *Oracle Workflow API Reference*

**Note:** Agent groups are currently only available for the version of Oracle Workflow embedded in Oracle Applications.

XML files uploaded or downloaded by the Workflow XML Loader should have the extension `.wfx` to identify them as Workflow object XML definitions.

You can download Business Event System object definitions in either normal download mode or exact download mode.

- Normal download mode lets you save a generic copy of object definitions from one system that you can use to create similar definitions in other systems. In this mode, the Workflow XML Loader replaces certain system-specific data within the object definitions with tokens. Choose normal download mode, for example, when you want to save Business Event System object definitions from a development system as seed data that can be uploaded to a production system.
- Exact download mode lets you save object definitions exactly as they are specified in the database. In this mode, the Workflow XML Loader does not convert any data to tokens; instead, all values, including system-specific values, are copied to the XML file. Choose exact download mode, for example, when you want to save Business Event System object definitions from one production system so that you can replicate them to another production system that communicates with the first.

In normal download mode, the Workflow XML Loader uses the following tokens to replace system-specific data within Business Event System object definitions. The tokens are prefixed by `#`.

- `#NEW` - Replaces the global unique identifier for an agent within an agent definition, or for an event subscription within a subscription definition.
- `#LOCAL` - Replaces the global unique identifier for the local system wherever it appears within an agent or subscription definition.
- `#OWNER` - Replaces the name of the schema that owns a queue when the schema appears as part of the queue name and agent address within an agent definition.
- `#SID` - Replaces the database system identifier (SID) when it appears as part of the agent address within an agent definition.
- `#WF_IN` - Replaces the global unique identifier for the WF\_IN agent on the local system when it appears as the Source Agent, Out Agent, or To Agent within an event subscription definition.
- `#WF_OUT` - Replaces the global unique identifier for the WF\_OUT agent on the local system when it appears as the Source Agent, Out Agent, or To Agent within an event subscription definition.
- `#WF_ERROR` - Replaces the global unique identifier for the WF\_ERROR agent on the local system when it appears as the Source Agent, Out Agent, or To Agent within an event subscription definition.

By converting these system-specific values to tokens, the loader produces template definitions that you can use to create similar objects in other systems. When you upload object definitions that contain tokens to a database, Oracle Workflow replaces the tokens with the appropriate values for that system.

**Note:** Because the Workflow XML Loader replaces the global unique identifier for a subscription with a token in normal download mode, each subscription must be identified instead by a unique combination of subscribing system, source type, triggering event, source agent, phase, owner name, and owner tag. If you define several subscriptions with similar properties, ensure that each subscription has a different phase number to differentiate it from the others. Otherwise, when you upload the subscription definitions to a database, the Workflow XML Loader may overwrite one subscription with another that has the same identifying properties.

You can upload Business Event System object definitions in either normal upload mode or force upload mode.

- In normal upload mode, the Workflow XML Loader loads the object definitions from the source XML file into the Business Event System tables in the database, but does not update any event or subscription definition with a customization level of User. Oracle Workflow uses this mode to preserve your customizations during upgrades.
- In force upload mode, the Workflow XML Loader loads the object definitions from the source XML file into the Business Event System tables in the database and overwrites any existing definitions, even for events or subscriptions with a customization level of User. Use this mode when you want to update the definitions for your own custom events and subscriptions.

See: Access Protection for Business Event System Data, page 6-6 and Managing Business Events, *Oracle Workflow Developer's Guide*.

### To Download Business Event System XML Definitions from a Database:

To download Business Event System object definitions from a database to a flat XML file, you can either run the Workflow XML Loader manually, or, if you are using the standalone version of Oracle Workflow, you can use a script to run the loader.

To run the Workflow XML Loader manually, run JRE against `oracle.apps.fnd.wf.WFXLoad`. You must specify your CLASSPATH pointing to the Java Runtime Environment, the directory containing the Workflow JAR files, the Oracle JDBC implementation, and the following Workflow JAR files:

- `wfjava.jar` - Workflow Java utilities
- `wfapi.jar` - Workflow Java APIs

**Note:** If you are using the standalone version of Oracle Workflow, the Workflow JAR files are located in the `<ORACLE_HOME>/jlib` directory. If you are using the version of Oracle Workflow embedded in Oracle Applications, the Workflow JAR files are located in the `<ORACLE_HOME>/wf/java/oracle/apps/fnd/wf/jar/` directory.

For example, on UNIX, use the following command to run the Workflow XML Loader:

```
jre -classpath "$<JREPATH>/rt.jar:$<Workflow_JAR_file_directory>:
$<Workflow_JAR_file_directory>/wfjava.jar:
$<Workflow_JAR_file_directory>/wfapi.jar:
$<ORACLE_HOME>/jdbc/lib/classes111.zip:"
oracle.apps.fnd.wf.WFXLoad -d[e] <user> <password>
<connect_string> <protocol> <lang> <output_file> <object> <key>
OWNER_TAG <owner_tag>
```

On Windows, use the following command:

```
jre -classpath ";<JREPATH>\rt.jar;<Workflow_JAR_file_directory>;
<Workflow_JAR_file_directory>\wfjava.jar;
<Workflow_JAR_file_directory>\wfapi.jar;
<ORACLE_HOME>\jdbc\lib\classes111.zip;"
oracle.apps.fnd.wf.WFXLoad -d[e] <user> <password>
<connect_string> <protocol> <lang> <output_file> <object> <key>
OWNER_TAG <owner_tag>
```

If you are using the standalone version of Oracle Workflow, you can use sample scripts called `wfxload` for UNIX or `wfxload.bat` for Windows to run the Workflow XML Loader. These scripts are located on your server in the Oracle Workflow admin subdirectory. For example, on UNIX, use the following command:

```
wfxload -d[e] <user> <password> <connect_string> <protocol>
<lang> <output_file> <object> <key> OWNER_TAG <owner_tag>
```

On Windows, use the following command:

```
wfxload.bat -d[e] <user> <password> <connect_string>
<protocol> <lang> <output_file> <object> <key>
OWNER_TAG <owner_tag>
```

When running the Workflow XML Loader, use either the `-d` option or the `-de` option to specify the download mode that you want.

- `-d` - Normal download mode. The loader converts system-specific data within the object definitions to tokens prefixed with #, where appropriate.
- `-de` - Exact download mode. The loader copies the object definitions exactly and does not convert any data to tokens.

Additionally, replace the variables in the download command with your parameters as follows:

- `<user>` - The user name of your database account.
- `<password>` - The password for your database account.
- `<connect_string>` - The connect string for the database. The format of the connect string depends on the JDBC driver type.
  - For a JDBC OCI8 driver, the connect string should be the database name as specified in its TNSNAMES entry, in the following format:  
`<database_name>`
  - For a JDBC THIN driver, you can use two different types of connect string. For the first type, the connect string should include the host name, port number, and database system identifier (SID) in the following format:  
`<host_name>:<port_number>:<database_SID>`



For the second type, the connect string should include an Oracle Net name-value pair with the host name, protocol, port number, and SID in the following format:

```
(description=(address=(host=<host_name>)(protocol= <protocol>)  
(port=<port_number>))(connect_data=(sid=<database_SID>)))
```

- `<protocol>` - The JDBC driver type you want to use to connect to the database. The JDBC driver type can be either `oci8` or `thin`.
- `<lang>` - The abbreviation for the language of the XML file. This parameter is case insensitive. Use the standard language abbreviations for the Oracle Database, such as `US` for American or `JA` for Japanese. For a list of the standard language abbreviations, see: *Locale Data, Oracle National Language Support Guide*.
- `<output_file>` - The name and full path of the output file to which you want to save the definitions. The output file should have the extension `.wfx`.
- `<object>` - The type of object definitions you want to download.
  - `EVENTS` - Event and event group member definitions
  - `SUBSCRIPTIONS` - Event subscription definitions
  - `AGENTS` - Agent and system definitions, and, for Oracle Applications, agent group member definitions

**Note:** The Workflow XML Loader only downloads event subscription, agent, agent group member, and system definitions that belong to the local system.

- `<key>` - An optional key to restrict the definitions that are downloaded. If you specify a key, the loader retrieves definitions only for those objects whose internal names include that key. The key value is case sensitive and cannot contain any spaces. To retrieve all object definitions of the specified type, you can omit this parameter.

**Note:** The Workflow XML Loader downloads event group membership information for each individual event along with that event's definition. That is, if you choose the object type `EVENTS` and you specify a particular event name as the key, the Workflow XML Loader downloads the event definition as well as information about the event's membership in any event groups. However, if you choose the object type `EVENTS` and you specify a particular event group name as the key, the Workflow XML Loader downloads only the definition of the event group itself, without any information about the member events.

- `OWNER_TAG <owner_tag>` - An optional program ID code for the program or application that owns the object definitions you want to download. This value is case sensitive and cannot contain any spaces. If you pass this parameter, you must include the `OWNER_TAG` marker before the owner tag value to identify the parameter.

**Note:** To report more extensive debugging information in the program output, you can run the Workflow XML Loader in debug mode by including the `DebugMode` argument just before the `-d` or `-de` option. For example, use the following command:

```
jre -classpath <classpath> oracle.apps.fnd.wf.WFXLoad
DebugMode -d[e] <user> <password> <connect_string>
<protocol> <lang> <output_file> <object> <key>
OWNER_TAG <owner_tag>
```

**Important:** To use the Workflow XML Loader in download mode, your Oracle Database version must be Oracle8i Database Release 3 (8.1.7) or higher.. The download utility is not supported for earlier versions of Oracle8i Database. To replicate Business Event System objects from one system to another for earlier database versions, you should follow the steps to synchronize systems using predefined subscriptions provided with the Business Event System. See: *Synchronizing Systems, Oracle Workflow Developer's Guide*.

You can, however, use the Workflow XML Loader in upload mode with versions of Oracle8i Database earlier than Release 3 (8.1.7).

### To Upload Business Event System XML Definitions to a Database:

To upload Business Event System object definitions from an XML file to a database, you can either run the Workflow XML Loader manually, or, if you are using the standalone version of Oracle Workflow, you can use a script to run the loader.

To run the Workflow XML Loader manually, run JRE against `oracle.apps.fnd.wf.WFXLoad`. You must specify your CLASSPATH pointing to the Java Runtime Environment, the directory containing the Workflow JAR files, the Oracle JDBC implementation, and the following Workflow JAR files:

- `wfjava.jar` - Workflow Java utilities
- `wfapi.jar` - Workflow Java APIs

**Note:** If you are using the standalone version of Oracle Workflow, the Workflow JAR files are located in the `<ORACLE_HOME>/jlib` directory. If you are using the version of Oracle Workflow embedded in Oracle Applications, the Workflow JAR files are located in the `<ORACLE_HOME>/wf/java/oracle/apps/fnd/wf/jar/` directory.

For example, on UNIX, use the following command to run the Workflow XML Loader:

```
jre -classpath "$<JREPATH>/rt.jar:$<Workflow_JAR_file_directory>:
$<Workflow_JAR_file_directory>/wfjava.jar:
$<Workflow_JAR_file_directory>/wfapi.jar:
$<ORACLE_HOME>/jdbc/lib/classes111.zip:"
oracle.apps.fnd.wf.WFXLoad -u[f] <user> <password>
<connect_string> <protocol> <lang> <source_file>
```

On Windows, use the following command:

```
jre -classpath "<JREPATH>\rt.jar;<Workflow_JAR_file_directory>;
<Workflow_JAR_file_directory>\wfjava.jar;
<Workflow_JAR_file_directory>\wfapi.jar;
<ORACLE_HOME>\jdbc\lib\classes111.zip;"
oracle.apps.fnd.wf.WFXLoad -u[f] <user> <password>
<connect_string> <protocol> <lang> <source_file>
```

If you are using the standalone version of Oracle Workflow, you can use sample scripts called `wfxload` for UNIX or `wfxload.bat` for Windows to run the Workflow XML Loader. These scripts are located on your server in the Oracle Workflow `admin` subdirectory. For example, on UNIX, use the following command:

```
wfxload -u[f] <user> <password> <connect_string> <protocol>
<lang> <source_file>
```

On Windows, use the following command:

```
wfxload.bat -u[f] <user> <password> <connect_string>
<protocol> <lang> <source_file>
```

When running the Workflow XML Loader, use either the `-u` option or the `-uf` option to specify the upload mode that you want.

- `-u` - Normal upload mode. The Workflow XML Loader loads the object definitions from the source XML file into the Business Event System tables in the database, but does not make any updates to events or subscriptions with a customization level of User.
- `-uf` - Force upload mode. The Workflow XML Loader loads the object definitions from the source XML file into the Business Event System tables in the database and overwrites any existing definitions, even for events or subscriptions with a customization level of User.

Additionally, replace the variables with your parameters as follows:

- `<user>` - The user name of your database account.
- `<password>` - The password for your database account.
- `<connect_string>` - The connect string for the database. The format of the connect string depends on the JDBC driver type.
  - For a JDBC OCI8 driver, the connect string should be the database name as specified in its TNSNAMES entry, in the following format:  
`<database_name>`
  - For a JDBC THIN driver, the connect string should include the host name, port number, and database system identifier (SID) in the following format:  
`<host_name>:<port_number>:<database_SID>`
- `<protocol>` - The JDBC driver type you want to use to connect to the database. The JDBC driver type can be either `oci8` or `thin`.
- `<lang>` - The abbreviation for the language of the XML file. This parameter is case insensitive. Use the standard language abbreviations for the Oracle Database, such as `US` for American or `JA` for Japanese. For a list of the standard language abbreviations, see: *Locale Data, Oracle National Language Support Guide*.
- `<source_file>` - The name and full path of the source file from which you want to upload definitions. The source file should have the extension `.wfx`.

Each subscription definition that you want to upload must include a phase number, owner name, and owner tag. The Workflow XML Loader cannot upload a source file containing subscription definitions that are missing this information.

If the source file contains subscription definitions downloaded in exact mode, the subscriptions are loaded into the Business Event System tables according to their global

unique identifiers. However, if the subscription definitions were downloaded in normal mode, using tokens, each subscription is identified instead by a unique combination of subscribing system, source type, triggering event, source agent, phase, owner name, and owner tag. If you define several subscriptions with similar properties, ensure that each subscription has a different phase number to differentiate it from the others. Otherwise, during upload, the Workflow XML Loader may overwrite one subscription with another that has the same identifying properties.

**Note:** To report more extensive debugging information in the program output, you can run the Workflow XML Loader in debug mode by including the `DebugMode` argument just before the `-u` option. For example, use the following command:

```
jre -classpath <classpath> oracle.apps.fnd.wf.WFXLoad
DebugMode -u[f] <user> <password> <connect_string>
<protocol> <lang> <source_file>
```

---

# Workflow Administration Scripts

This chapter describes the SQL scripts that workflow administrators can run against an Oracle Workflow server installation.

This chapter covers the following topics:

- Workflow Administration SQL Scripts

## Workflow Administration SQL Scripts

You can use any of the following administrative scripts to help set up and maintain various features in Oracle Workflow. For the standalone version of Oracle Workflow, the scripts are located on your server in the Oracle Workflow `admin/sql` subdirectory. For the version of Oracle Workflow embedded in Oracle Applications, the scripts are located in the `sql` subdirectory under `$FND_TOP`.

- Update translation tables - `WFNLADD.sql`, page 7-4.
- Enable/disable a language - `wfnlena.sql`, page 7-9
- Run a workflow process - `wfrun.sql`, page 7-11.
- Start a background engine - `wfbkg.sql`, page 7-4.
- Show activities deferred for the next background engine execution - `wfbkgchk.sql`, page 7-5.
- Display a status report for an item
  - `wfstatus.sql`, page 7-11.
  - `wfstat.sql`, page 7-11.
- Show a notification's status - `wfntfsh.sql`, page 7-9.
- Display debugging information for a notification - `wfmlrdbg.sql`, page 7-8.
- Reset the protection level for objects - `wfprot.sql`, page 7-9.
- Handle errored activities - `wfretry.sql`, page 7-10.
- Check for version and process definition errors
  - `wfverchk.sql`, page 7-12.
  - `wfverupd.sql`, page 7-12.
  - `wfststdchk.sql`, page 7-12.
- Check for invalid hanging foreign keys - `wfrefchk.sql`, page 7-10.

- Check the directory service data model - wfdirchk.sql, page 7-7.
- Clean up workflow queues in the system tables - wfqclean.sql, page 7-9.
- Change the internal name of a workflow object

**Note:** Generally, you cannot update the internal name of a workflow object in Oracle Workflow Builder. However, if you load your process definition to a database, you can use one of these scripts to update a workflow object's internal name if no runtime data exists for the object. You should only use these scripts to correct errors in an object's internal name during design time. Do not use these scripts to rename objects that are involved in running instances of processes.

- wfchact.sql, page 7-5.
- wfchacta.sql, page 7-5.
- wfchita.sql, page 7-6.
- wfchitt.sql, page 7-6.
- wfchluc.sql, page 7-6.
- wfchlut.sql, page 7-6.
- wfchmsg.sql, page 7-6.
- wfchmsga.sql, page 7-7.
- Remove data from Oracle Workflow tables
  - wfrmall.sql, page 7-10.
  - wfrmitms.sql, page 7-11.
  - wfrmitt.sql, page 7-11.
  - wfrmttype.sql, page 7-11.
  - wfrmita.sql, page 7-10.

**Note:** In Oracle Applications, a standard concurrent program called "Purge Obsolete Workflow Runtime Data" is also available. See: FNDWFPR, page 7-3.

If you are using the standalone version of Oracle Workflow, you can use the standalone Oracle Workflow Manager component available through Oracle Enterprise Manager to submit and manage Workflow purge database jobs. For more information, please refer to the Oracle Workflow Manager online help.

- Display the version of the Oracle Workflow server - wfver.sql, page 7-12.
- Stop the Java Function Activity Agent - wfjvstop.sql, page 7-8.
- Enqueue an event message on a queue using an override agent - wfevttenq.sql, page 7-7.

- Run a listener to monitor an agent for inbound event messages - wfagtlst.sql, page 7-4.

## FNDWFPR

For Oracle Workflow embedded in Oracle Applications, use the standard concurrent program FNDWFPR "Purge Obsolete Workflow Runtime Data" to purge old data from the Oracle Workflow tables regularly.

This program purges obsolete runtime information associated with work items, including status information and any associated notifications and Oracle XML Gateway transactions. By default, it also purges obsolete design information, such as activities that are no longer in use and expired ad hoc users and roles, and obsolete runtime information not associated with work items, such as notifications or Oracle XML Gateway transactions that were not handled through a workflow process. You can optionally choose to purge only core runtime information associated with work items for performance gain during periods of high activity, and purge all obsolete information as part of your routine maintenance during periods of low activity.

Navigate to the Submit Requests form in Oracle Applications to submit the Purge Obsolete Workflow Runtime Data concurrent program. When you install and set up Oracle Applications and Oracle Workflow, your system administrator needs to add this concurrent program to a request security group for the responsibility that you want to run this program from. See: Overview of Concurrent Programs and Requests, *Oracle Applications System Administrator's Guide* and Running Reports and Programs, *Oracle Applications User's Guide*.

You can supply the following parameters for the Purge Obsolete Workflow Runtime Data concurrent program:

- Item Type - The item type to purge. Leaving this field blank defaults to purging the runtime data for all item types.
- Item Key - The item key to purge. Leaving this field blank defaults to purging the runtime data for all item keys.
- Age - Minimum age of data to purge, in days. The default is 0.
- Persistence Type - The persistence type to be purged, either `Temporary` or `Permanent`. The default is `Temporary`.
- Core Workflow Only - Enter 'Y' to purge only obsolete runtime data associated with work items, or 'N' to purge all obsolete runtime data as well obsolete design data. The default is 'N'.
- Commit Frequency - The number of records to purge before the program commits data. To reduce rollback size and improve performance, set this parameter to commit data after a smaller number of records. The default is 500 records.

**Note:** After performing a commit, the program resumes purging work items with the next subsequent begin date. In some cases, if additional items have the same begin date as the last item that was purged before a commit, the program may not purge all eligible items. To purge these remaining work items, simply rerun the program.

**Note:** If you are using the version of Oracle Workflow embedded in Oracle Applications and you have implemented Oracle Applications Manager, you can use Oracle Workflow Manager to submit and manage the Purge Obsolete Workflow Runtime Data concurrent program. For more information, please refer to the Oracle Applications Manager online help.

Additionally, in Oracle Applications you can use the Purge Obsolete ECX Data concurrent program to purge Oracle XML Gateway transactions according to Oracle XML Gateway-specific parameters. See: Purge Obsolete ECX Data Concurrent Program, *Oracle XML Gateway User's Guide*.

## WFNLADD.sql

If you enable a new language in your Oracle installation, use `WFNLADD.sql` to add the missing rows for that language to the Oracle Workflow translation tables. See: Setting Up Additional Languages, page 2-46 and `wfnlena.sql`, page 7-9.

Use the script as follows:

```
sqlplus <user/pwd> @WFNLADD
```

**Note:** The `wfnlena.sql` and `WFNLADD.sql` scripts prepare the database for loading workflow definitions in another language. However, these scripts by themselves do not enable displaying Oracle Workflow Web pages in other languages. See: Setting Up Additional Languages, page 2-46.

## Wfagt1st.sql

Use `wfagt1st.sql` to run a PL/SQL agent listener to monitor an agent for inbound event messages. When a message is received, the Event Manager searches for and executes any enabled subscriptions by the local system to the event with a source type of External, and also any enabled subscriptions by the local system to the Any event with a source type of External.

Use the script as follows:

```
sqlplus <user/pwd> @wfagt1st <agent_name>
```

Replace `<agent_name>` with the internal name of the agent that you want to monitor for inbound event messages.

**Note:** You should use this script primarily for debugging purposes.

## Related Topics

Listen, *Oracle Workflow API Reference*

## Wfbkg.sql

If you are using the standalone version of Oracle Workflow, you can use `wfbkg.sql` to start a background engine. This script calls the `WF_ENGINE.Background` API to run a background engine for the indicated number of minutes. On completing its current set of eligible activities to process, the background process waits for the specified number of seconds before launching another background engine. This cycle continues until the indicated number of minutes have elapsed.



Use the script as follows:

```
sqlplus <user/pwd> @wfbkg <minutes> <seconds>
```

Replace *<minutes>* with the number of minutes you want the background engine to run, and replace *<seconds>* with the number of seconds you want the background engine to wait between queries.

## Related Topics

Background, *Oracle Workflow API Reference*

Setting up Background Workflow Engines, page 2-50

## Wfbkgchk.sql

Use `wfbkgchk.sql` to get a list of all activities waiting to be processed by the background engine the next time it runs.

Use the script as follows:

```
sqlplus <user/pwd> @wfbkgchk <WF_schema>
```

Replace *<WF\_schema>* with the Oracle Workflow schema, usually `applsys` in Oracle Applications or `owf_mgr` in standalone Oracle Workflow.

## Related Topics

Background, *Oracle Workflow API Reference*

Setting up Background Workflow Engines, page 2-50

## Wfchact.sql

Use `wfchact.sql` to change the internal name of an activity and update all references to the activity. See: Change the internal name of a workflow object, page 7-2.

Use the script as follows:

```
sqlplus <user/pwd> @wfchact <act_type> <old_act> <new_act>
```

Replace *<act\_type>* with the item type that the activity you wish to update is associated with, replace *<old\_act>* with the current internal name of the activity, and replace *<new\_act>* with the new internal name of the activity.

## Wfchacta.sql

Use `wfchacta.sql` to change the internal name of an activity attribute and update all references to the activity attribute. See: Change the internal name of a workflow object, page 7-2.

Use the script as follows:

```
sqlplus <user/pwd> @wfchacta <act_type> <old_acta> <new_acta>
```

Replace *<act\_type>* with the item type that the activity attribute you wish to update is associated with, replace *<old\_acta>* with the current internal name of the activity attribute, and replace *<new\_acta>* with the new internal name of the activity attribute.

## Wfchita.sql

Use `wfchita.sql` to change the internal name of an item attribute and update all references to the item attribute. See: Change the internal name of a workflow object, page 7-2.

Use the script as follows:

```
sqlplus <user/pwd> @wfchita <item_type> <old_attr> <new_attr>
```

Replace `<item_type>` with the item type that the item attribute you wish to update is associated with, replace `<old_attr>` with the current internal name of the item attribute, and replace `<new_attr>` with the new internal name of the item attribute.

## Wfchitt.sql

Use `wfchitt.sql` to change the internal name of an item type and update all references to the item type. See: Change the internal name of a workflow object, page 7-2.

Use the script as follows:

```
sqlplus <user/pwd> @wfchitt <old_type> <new_type>
```

Replace `<old_type>` with the current internal name of the item type, and replace `<new_type>` with the new internal name of the item type.

## Wfchluc.sql

Use `wfchluc.sql` to change the internal name of a lookup code and update all references to the lookup code. See: Change the internal name of a workflow object, page 7-2.

Use the script as follows:

```
sqlplus <user/pwd> @wfchluc <lookup_type> <old_luc> <new_luc>
```

Replace `<lookup_type>` with the lookup type of the lookup code you wish to update, replace `<old_luc>` with the current internal name of the lookup code, and replace `<new_luc>` with the new internal name of the lookup code.

## Wfchlut.sql

Use `wfchlut.sql` to change the internal name of a lookup type and update all references to the lookup type. See: Change the internal name of a workflow object, page 7-2.

Use the script as follows:

```
sqlplus <user/pwd> @wfchlut <old_lut> <new_lut>
```

Replace `<old_lut>` with the current internal name of the lookup type, and replace `<new_lut>` with the new internal name of the lookup type.

## Wfchmsg.sql

Use `wfchmsg.sql` to change the internal name of a message and update all references to the message. See: Change the internal name of a workflow object, page 7-2.

Use the script as follows:

```
sqlplus <user/pwd> @wfchmsg <msg_type> <old_msg> <new_msg>
```

Replace `<msg_type>` with the item type of the message you wish to update, replace `<old_msg>` with the current internal name of the message, and replace `<new_msg>` with the new internal name of the message.

## Wfchmsga.sql

Use `wfchmsga.sql` to change the internal name of a message attribute. This script does not update the message subject or message body references to the message attribute, however. You must manually update the message attribute references. See: Change the internal name of a workflow object, page 7-2.

Use the script as follows:

```
sqlplus <user/pwd> @wfchmsga <msg_type> <msg_name> <old_attr> <new_attr>
```

Replace `<msg_type>` with the item type of the message attribute you wish to update, replace `<msg_name>` with the internal name of the message that the message attribute belongs to, replace `<old_attr>` with the current internal name of the message attribute, and replace `<new_attr>` with the new internal name of the message attribute.

## Wfdirchk.sql

Use `wfdirchk.sql` to check for the following conditions in your directory service data model:

- Invalid internal names that contain the characters '#', ':', or '/' in WF\_USERS.
- Invalid compound names in WF\_USERS or WF\_ROLES.
- Duplicate names in WF\_USERS or WF\_ROLES.
- Multiple names in WF\_USERS or WF\_ROLES linked to the same row in the original repository.
- Missing display names in WF\_USERS or WF\_ROLES.
- Invalid notification preference or null e-mail address if the notification preference is set in WF\_USERS or WF\_ROLES to receive e-mail.
- Invalid status in WF\_USERS.
- Rows in WF\_USERS that do not have a corresponding row in WF\_ROLES.
- Invalid internal names in WF\_ROLES that contain the characters '#' or '/' or have a length greater than 30 characters.
- Invalid user/role foreign key in WF\_USER\_ROLES.
- Missing user/role in WF\_USER\_ROLES. Every user must participate in its own role.
- Duplicate rows in WF\_USER\_ROLES.

`Wfdirchk.sql` should return no rows to ensure that your directory service data model is correct.

Use the script as follows:

```
sqlplus <user/pwd> @wfdirchk
```

## Wfevtmq.sql

Use `wfevtmq.sql` to enqueue an event message on a local queue using an override agent. This script constructs an event message using the event name, event key, event

data, From Agent, and To Agent you specify. Then the event message is enqueued on the queue associated with the override agent you specify, which can be different than the From Agent listed inside the event message. If no override agent is specified, the event message is enqueued on the message's From Agent by default.

**Note:** This script can only enqueue an event message onto a queue for an agent on the local system.

Use the script as follows:

```
sqlplus <user/pwd> @wfevteng <overrideagent> <overridesystem>
<fromagent> <fromsystem> <toagent> <tosystem> <eventname>
<eventkey> <message>
```

Replace the variables with your parameters as follows:

- *<overrideagent>* - The agent on whose queue you want to enqueue the event message.
- *<overridesystem>* - The system where the override agent is located.
- *<fromagent>* - The From Agent that you want to list in the event message.
- *<fromsystem>* - The system where the From Agent is located.
- *<toagent>* - The To Agent that receives the event message.
- *<tosystem>* - The system where the To Agent is located.
- *<eventname>* - The internal name of the event.
- *<eventkey>* - The event key that uniquely identifies the instance of the event.
- *<message>* - The event data.

## Wfjvstop.sql

Use `wfjvstop.sql` to stop the Java Function Activity Agent by placing a stop message on the 'Outbound' queue.

Use the script as follows:

```
sqlplus <user/pwd> @wfjvstop
```

## Wfmlrdbg.sql

Use `wfmlrdbg.sql` to display debugging information for a notification that you can use to check the status of the notification or investigate errors. This script creates an output file named `wfmlrdbg<nid>.html`, where *<nid>* is the notification ID (NID).

Use the script as follows:

```
sqlplus <user/pwd> @wfmlrdbg <nid> <FND_schema>
```

Replace *<nid>* with the notification ID for the notification. Replace *<FND\_schema>* with the ORACLE username that connects to Oracle Application Object Library data in Oracle Applications, usually `applsys`, or the ORACLE username for Oracle Workflow in standalone Oracle Workflow, usually `owf_mgr`.

**Note:** In Oracle Applications, you can also obtain this information by running the Mailer Diagnostic Test in Oracle Diagnostics. See: Mailer Diagnostic Test, page D-7.

## Wfnlena.sql

If you define a new language in your Oracle installation, use `wfnlena.sql` to enable or disable that language in Oracle Workflow. See: `WFNLADD.sql`, page 7-4.

Use the script as follows:

```
sqlplus <user/pwd> @wfnlena <language_code> <enable_flag>
```

Replace `<language_code>` with a valid language code, and replace `<enable_flag>` with `Y` to enable and `N` to disable the specified language.

**Note:** The `wfnlena.sql` and `WFNLADD.sql` scripts prepare the database for loading workflow definitions in another language. However, these scripts by themselves do not enable displaying Oracle Workflow Web pages in other languages. See: *Setting Up Additional Languages*, page 2-46.

## Wfntfsh.sql

Use `wfntfsh.sql` to display status information about a particular notification, given its notification ID.

Use the script as follows:

```
sqlplus <user/pwd> @wfntfsh <notification_id>
```

## Wfprot.sql

Use `wfprot.sql` to reset the protection level of all objects associated with a specified item type.

**Important:** If you reset the protection level for all objects in an item type, then none of those objects in the item type will be customizable by users operating at an access level higher than the new protection level.

Use the script as follows:

```
sqlplus <user/pwd> @wfprot <item_type> <protection_level>
```

Replace `<item_type>` with the item type that you want to reset the protection level for, and replace `<protection_level>` with the new protection level.

## Wfqclean.sql

Use `wfqclean.sql` to clean up Workflow queues in the system tables.

**Important:** This script is only necessary if you are using a version of the Oracle8 Database prior to 8.1.5 and you drop your user or tablespace without previously dropping the Workflow queues using `wfqued.sql`. The `wfqued.sql` script is located in the Oracle Workflow `sql` subdirectory. The `DROP USER CASCADE` and `DROP TABLESPACE INCLUDING CONTENTS` commands in these prior versions of Oracle8 leave queue data in your system tables that result in an ORA-600 error when you recreate the queues. To avoid this case, you should always run `wfqued.sql` to drop the queues prior to dropping the user or tablespace.

Use the `wfqclean.sql` script as follows:

```
sqlplus system/manager @wfgclean <un>
```

Replace <un> with the username of the schema that experiences the ORA-600 error.

## Wfrefchk.sql

Use wfrefchk.sql to check for invalid workflow data that is missing primary key data for a foreign key.

```
sqlplus <user/pwd> @wfrefchk
```

## Wfretry.sql

Use wfretry.sql to display a list of activities that have encountered an error for a given process instance and then specify whether to skip, retry, or reset any one of those errored activities.

Use the script as follows:

```
sqlplus <user/pwd> @wfretry <item_type> <item_key>
```

Provide an item type and item key to uniquely identify an item or process instance. The script first returns the list of errored activities by label name. The script then prompts you for the label name of an activity that you wish to skip, retry, or reset. If you choose skip, then you must also specify the result that you want the skipped activity to have.

**Note:** This script calls the WF\_ENGINE HandleError API, so you can actually specify the label name of any activity associated with the specified item type and item key to perform a rollback. See: *HandleError, Oracle Workflow API Reference*.

## Wfrmall.sql

Use wfrmall.sql to delete all data in all Oracle Workflow runtime and design time tables.

Use the script as follows:

```
sqlplus <user/pwd> @wfrmall
```

**Warning:** This script deletes **ALL** workflow definitions. Do not use this script unless you are absolutely sure you want to remove all workflow data from your runtime and design time tables.

After you run this script, you should also reload the workflow definitions for the Standard, System: Mailer, and System: Error item types stored in the files wfstd.wft, wfmail.wft, and wferror.wft, respectively.

## Wfrmita.sql

Use wfrmita.sql to delete all workflow data for a specified item type attribute. This script prompts you for the item type and the name of the attribute to delete. Alternatively, you can use Oracle Workflow Builder to delete an item type attribute from a workflow definition stored in a file or a database.

Use the script as follows:

```
sqlplus <user/pwd> @wfrmita
```

## Wfrmitms.sql

Use `wfrmitms.sql` to delete status information in Oracle Workflow runtime tables for a particular item. This script prompts you to choose between deleting all data associated with a specified item type and item key or deleting only data for the completed activities of the specified item type and item key.

Use the script as follows:

```
sqlplus <user/pwd> @wfrmitms <item_type> <item_key>
```

## Wfrmitt.sql

Use `wfrmitt.sql` to delete all data in all Oracle Workflow design time and runtime tables for a particular item type. This script prompts you for an item type from a list of valid item types.

Use the script as follows:

```
sqlplus <user/pwd> @wfrmitt
```

**Warning:** This script deletes **ALL** workflow data for the specified item type.

## Wfrmtime.sql

Use `wfrmtime.sql` to delete runtime data associated with a given item type. This script prompts you for an item type to purge from a list of valid item types, then asks you to choose between deleting all runtime data associated with the specified item type or deleting only runtime data for the completed activities and items of the specified item type.

Use the script as follows:

```
sqlplus <user/pwd> @wfrmtime
```

## Wfrun.sql

Use `wfrun.sql` to create and start a specified process.

Use the script as follows:

```
sqlplus <user/pwd> @wfrun <item_type> <item_key> <process_name>
```

**Note:** The item key for a process instance can only contain single-byte characters. It cannot contain a multibyte value.

## Wfstat.sql

Use `wfstat.sql` to display a developer status report for a specified item. The output is 132 characters per line.

Use the script as follows:

```
sqlplus <user/pwd> @wfstat <item_type> <item_key>
```

## Wfstatus.sql

Use `wfstatus.sql` to display an end user status report for a specified item. The output is 132 characters per line.

Use the script as follows:

```
sqlplus <user/pwd> @wfstatus <item_type> <item_key>
```

## **Wfstdchk.sql**

Use `wfstdchk.sql` to check and report any problems found in the Oracle Workflow data model. For example, this script will report any function activities that reference invalid functions and scan the tables of each workflow process definition object to verify that each row has a valid internal name and display name.

Use the script as follows:

```
sqlplus <user/pwd> @wfstdchk
```

## **Wfver.sql**

Use `wfver.sql` to display the version of the Oracle Workflow server, the status and version of the Oracle Workflow PL/SQL packages, and the version of the Oracle Workflow views installed.

Use the script as follows:

```
sqlplus <user/pwd> @wfver
```

## **Wfverchk.sql**

Use `wfverchk.sql` if you suspect that problems arising in your workflow process are due to multiple versions of an activity being active simultaneously. This script identifies errors in versions of activities that cause multiple versions to appear to be active at once.

Use the script as follows:

```
sqlplus <user/pwd> @wfverchk
```

## **Wfverupd.sql**

Use `wfverupd.sql` to correct problems arising in your workflow process that are due to multiple versions of an activity being active simultaneously. This script identifies and corrects errors in versions of activities that cause multiple versions to appear to be active at once.

Use the script as follows:

```
sqlplus <user/pwd> @wfverupd
```



---

## Oracle Workflow Administrator Navigation Paths

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

This appendix covers the following topics:

- Oracle Workflow Administrator Navigation Paths

### Oracle Workflow Administrator Navigation Paths

This table shows the navigation paths to Oracle Workflow administrator 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.

## Oracle Workflow Administrator Navigation Paths

Web Page	Standard Navigation Path
Workflow Configuration, page 2-11	Workflow Administrator Web Applications: Administration > Workflow Preferences <i>or</i> Workflow Administrator Web (New): Administration > Workflow Preferences <i>or</i> Workflow Administrator Event Manager: Administration > Workflow Preferences
Administrator Home, page 4-3	Workflow Administrator Web Applications: Home <i>or</i> Workflow Administrator Web (New): Home <i>or</i> Workflow Administrator Event Manager: Home
Administrator Vacation Rules, page 4-5	Workflow Administrator Web Applications: Administration > Vacation Rules <i>or</i> Workflow Administrator Web (New): Administration > Vacation Rules <i>or</i> Workflow Administrator Event Manager: Administration > Vacation Rules
Administrator Notification Search, page 4-6	Workflow Administrator Web Applications: Administration > Notification Search <i>or</i> Workflow Administrator Web (New): Administration > Notification Search <i>or</i> Workflow Administrator Event Manager: Administration > Notification Search
Administrator Status Monitor, page 5-11	Workflow Administrator Web Applications: Status Monitor <i>or</i> Workflow Administrator Web (New): Status Monitor <i>or</i> Workflow Administrator Event Manager: Status Monitor
Oracle Workflow Manager component of Oracle Applications Manager, <i>Oracle Applications System Administrator's Guide</i>	Workflow Administrator Web Applications: Workflow Manager <i>or</i> Workflow Administrator Web (New): Workflow Manager <i>or</i> Oracle Applications Manager direct login page

**Note:** The Workflow Administrator Web (New) responsibility is 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 and Workflow Administrator Event Manager.

---

# Oracle Workflow Performance Concepts

This appendix describes concepts and techniques that you can use to enhance performance when running Oracle Workflow.

This appendix covers the following topics:

- Oracle Workflow Performance Concepts

## Oracle Workflow Performance Concepts

The performance of Oracle Workflow depends on several different factors. You can enhance performance in your workflow process design through effective use of synchronous, asynchronous, and forced synchronous processes, item attributes, message attributes, subprocesses, and deferred activities. You can also use partitioning and purging techniques to address performance issues associated with large quantities of runtime data.

For more information, see: *The Oracle Applications Tuning Handbook* by Andy Tremayne and Steve Mayze (Oracle Press, ISBN 0-07-212549-7) and *Oracle Database Concepts*.

## Designing Workflow Processes for Performance

You can enhance the performance of your workflow processes through effective process design.

### Synchronous, Asynchronous, and Forced Synchronous Workflows

When designing a workflow process, you must decide whether you want it to be executed as a synchronous, asynchronous, or forced synchronous process. The process design impacts the amount of time it takes for the Workflow Engine to return control to the calling application that initiates the process.

- **Synchronous** - A synchronous process contains only activities that can be executed immediately, so that the Workflow Engine executes the process without interruption from start to finish. The Workflow Engine does not return control to the calling application until it completes the process. With a synchronous process, you can immediately check for process results that were written to item attributes or directly to the database. However, the user must wait for the process to complete. If the process takes a long time, the application may appear to hang. In this case, you should change the process to an asynchronous process.
- **Asynchronous** - An asynchronous process is a process that the Workflow Engine cannot complete immediately because it contains activities that interrupt the flow. Examples of activities that force an asynchronous process include deferred

activities, notifications with responses, blocking activities, and wait activities. Rather than waiting indefinitely when it encounters one of these activities, the Workflow Engine sets the audit tables appropriately and returns control to the calling application. The workflow process is left in an unfinished state until it is started again, usually by the Notification System, Business Event System, or the background engine. With an asynchronous process, the user does not have to wait for the process to complete to continue using the application. However, the results of the process are not available until the process is completed at a later time.

- **Forced synchronous** - A forced synchronous process completes in a single SQL session from start to finish and never inserts into or updates any database tables. As a result, the execution speed of a forced synchronous process is significantly faster than a typical synchronous process. The process results are available immediately upon completion. However, no audit trail is recorded. You may want to use a forced synchronous process if your application needs to generate a specific result quickly and recording an audit trail is not a concern. To create a forced synchronous process, you must set the item key of your process to #SYNCH and follow certain restrictions in designing your process, such as not including any notification activities.

See: Overview of the Workflow Engine, *Oracle Workflow API Reference* and Synchronous, Asynchronous, and Forced Synchronous Processes, *Oracle Workflow API Reference*.

## Item Attributes

Item attributes act as global variables that can be referenced or updated by any activity within a workflow process. The number of item attributes directly affects the startup time for work items, because the Workflow Engine creates runtime copies of all item attributes when a new work item is created. For this reason, item attributes should be kept to a minimum.

Item attributes should be used for:

- Storing working information for the work item.
- Token replacement for messages. For messages where the number of lines may vary, such as in repeating groups, do not create individual item attributes for each line. Instead, use item and message attributes of type Document to combine the lines together.
- Storing primary key values so that functions can look up all necessary values from the database.
- Temporary placeholders to set activity attributes dynamically. For example, the performer of a notification may only be known at runtime, so you can reference an item attribute and seed the desired value just before executing the notification.

Item attributes should reference static values or values that are not in the database so that there are no concerns about keeping the values synchronized. (Primary key values, however, do not change.) Do not implement every column within a table as an item attribute.

See: Item Type Attributes, *Oracle Workflow Developer's Guide* and To Define an Item Type or Activity Attribute, *Oracle Workflow Developer's Guide*.

Item attribute types that can help you reduce the number of attributes you need include the following:

- Document - The attribute value is an embedded or attached document, which enables a complex structure to be rendered inline, or attached to notifications. You can specify the following types of documents:
  - PL/SQL document - A document representing data from the database as a character string, generated from a PL/SQL procedure.
  - PL/SQL CLOB document - A document representing data from the database as a character large object (CLOB), generated from a PL/SQL procedure.
  - PL/SQL BLOB document - A document representing data from the database as a binary large object (BLOB), generated from a PL/SQL procedure.
  - Oracle Applications Framework region - In Oracle Applications, a JSP call to an Oracle Applications Framework region for inclusion in a notification message.
- Role - The attribute value is the internal name of a role. If a message attribute of type role is included in a notification message, the attribute automatically resolves to the role's display name, eliminating the need for you to maintain separate attributes for the role's internal and display names. Also, when you view the notification from a Web browser, the role display name is a hypertext link to the e-mail address for that role.

See: Attribute Types, *Oracle Workflow Developer's Guide*.

Whenever multiple item attributes will be created, or multiple item attribute values will be set during workflow processing, use the array versions of the Add Item Attribute and Set Item Attribute workflow engine APIs (AddItemAttributeArray and SetItemAttributeArray, respectively). These APIs will significantly decrease the number of calls to Workflow Engine APIs, which can have a measurable impact on performance during batch processing. See: AddItemAttributeArray, *Oracle Workflow API Reference* and SetItemAttributeArray, *Oracle Workflow API Reference*.

## Message Attributes

To enhance performance, message attributes should be kept to a minimum. For messages where the number of lines may vary, such as in repeating groups, do not create individual item and message attributes for each line (LINE\_INFO1, LINE\_INFO2, etc.). Instead, use item and message attributes of type Document to combine the lines together.

See: Attribute Types, *Oracle Workflow Developer's Guide*, Send and Respond Message Attributes, *Oracle Workflow Developer's Guide*, and To Define a Message Attribute, *Oracle Workflow Developer's Guide*.

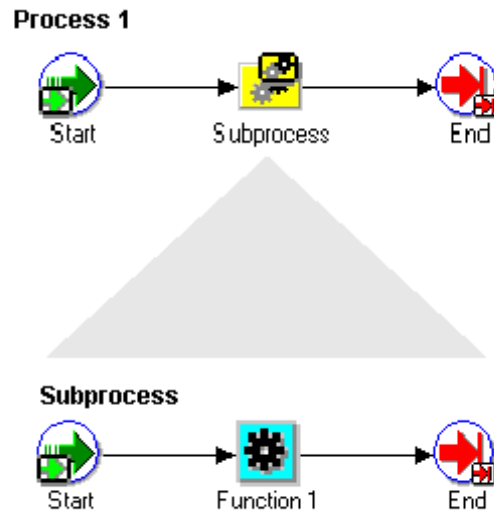
## Subprocesses

When you design a workflow process, you can group a collection of activities together in a process activity which represents a subprocess within the main process. Using subprocesses judiciously can help make workflow diagrams clearer and easier to read and can simplify workflow monitoring and maintenance. However, subprocesses also result in additional DML operations and additional state information stored in Workflow tables. Consequently, you should avoid unnecessary use of subprocesses when there is no functional benefit.

For example, the following two processes, Process 1 and Process 2, are functionally identical, both performing a function called Function 1. However, they result in different numbers of state rows being stored in Workflow tables.

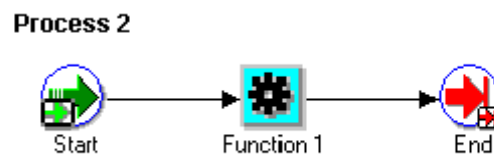
Process 1 contains a Start activity, a Subprocess activity, and an End activity. The subprocess contains a Start activity, the Function 1 activity, and an End activity. This process stores 7 state rows in Workflow tables.

**Example Process 1**



Process 2 simply contains a Start activity, the Function 1 activity, and an End activity. This process stores only 4 state rows in Workflow tables.

**Example Process 2**



Because more rows are stored in Workflow tables, the kind of design shown in the Process 1 diagram will result in slower workflow throughput and a need to purge Workflow runtime tables more frequently than what should be necessary with the Process 2 design.

**Note:** This guideline is not meant to imply that subprocesses should not be used at all. Collapsing all subprocesses can make workflow diagrams unreadable and difficult to maintain. This recommendation merely highlights that unnecessary overuse of subprocesses can have a negative performance impact.

See: Process Activity, *Oracle Workflow Developer's Guide* and To Create a Process Activity, *Oracle Workflow Developer's Guide*.

## Deferring Activities

The simplest and most effective way to improve the online user's response time is to defer function activities. You may want to defer activities that require a large amount of processing resource or time to complete. Oracle Workflow lets you manage the load on the Workflow Engine and the response time for the user by setting up supplemental engines to run these costly activities as background tasks. In these cases, the costly activity is deferred by the Workflow Engine and run later by a background engine.

When an activity is deferred, the main Workflow Engine can then continue to the next available activity, which may occur on some other parallel branch of the process. If no other activity is available to be executed, the Workflow Engine returns control immediately to the calling application. The user remains unaware that processing is still taking place, rendering a faster execution time.

To defer an activity, set the activity's cost above the default threshold cost at design time. The threshold cost is a PL/SQL package variable with a default value of 50 hundredths of a second. Set a cost above this threshold for all activities that you don't want the user to wait for.

At runtime, the Workflow Engine defers any thread to the background as soon as it encounters an activity with a cost higher than the threshold. Then the background engine later identifies the process as deferred and continues its execution.

In addition to deferred activities, background engines also handle timed out activities and stuck processes. You can run as many background engines as you want. You must have at least one background engine that can check for timed out activities, one that can process deferred activities, and one that can handle stuck processes. At a minimum, you need to set up one background engine that can handle both timed out and deferred activities as well as stuck processes.

Generally, you should run a separate background engine to check for stuck processes at less frequent intervals than the background engine that you run for deferred activities, normally not more often than once a day. Run the background engine to check for stuck processes when the load on the system is low.

See: *Deferred Processing*, *Oracle Workflow API Reference*, *Activity Cost*, *Oracle Workflow Developer's Guide*, *Setting Up Background Workflow Engines*, page 2-50, and *To Set Engine Thresholds*, page 2-53.

## Managing Runtime Data for Performance

When the Workflow Engine executes any type of workflow other than forced synchronous processes, status information is stored in runtime tables. The amount of data stored in these tables will grow depending on the complexity and number of workflows being executed.

Performance issues associated with large quantities of runtime data can be addressed by:

- Partitioning
- Purging

### Partitioning for Performance

Partitioning addresses key issues in supporting very large tables and indexes by letting you decompose them into smaller and more manageable pieces called partitions. SQL queries and DML statements do not need to be modified in order to access partitioned tables. However, once partitions are defined, DDL statements can access and manipulate

individual partitions rather than entire tables or indexes. In this way, partitioning can simplify the manageability of large database objects. Also, partitioning is entirely transparent to applications.

You can optionally run a script to partition certain Workflow tables that store runtime status data. This step is highly recommended for performance gain. Before running the script, you should ensure that you have backed up the tables that will be partitioned and that you have allowed sufficient free space and time for the script to run. For the version of Oracle Workflow embedded in Oracle Applications, the script is called `wfupartb.sql` and is located in the `admin/sql` subdirectory under `$FND_TOP`. For the standalone version of Oracle Workflow, the script is called `wfupart.sql` and is located in the `wf/admin/sql` subdirectory in your Oracle home. See: Partitioning Workflow Tables, page 2-9.

## Purging for Performance

You can use the Workflow purge APIs to purge obsolete runtime information for completed work items, obsolete runtime information not associated with work items, and obsolete design information. You may want to periodically purge this obsolete data from your system to increase performance. The Workflow purge APIs are defined in the PL/SQL package called `WF_PURGE`.

The availability of runtime data for purging depends on the persistence type of the item type. The persistence type controls how long a status audit trail is maintained for each instance of the item type.

- If you set an item type's Persistence to Permanent, the runtime status information is maintained indefinitely until you specifically purge the information by calling the procedure `WF_PURGE.TotalPerm( )`.
- If you set an item type's Persistence to Temporary, you must also specify the number of days of persistence ('*n*'). The status audit trail for each instance of a Temporary item type is maintained for at least '*n*' days of persistence after its completion date. After the '*n*' days of persistence, you can then use any of the `WF_PURGE` APIs to purge the item type's runtime status information. See: *WF\_PURGE, Oracle Workflow API Reference*.
- If you set an item type's Persistence to Synchronous, Oracle Workflow expects instances of that item type to be run as forced synchronous processes with an item key of `#SYNCH`. Forced synchronous processes complete in a single SQL session from start to finish and never insert into or update any database tables. Since no runtime status information is maintained, you do not normally need to perform any purging for a process with the Synchronous persistence type. However, if you run the process with a unique item key in asynchronous mode for testing or debugging purposes, Oracle Workflow does maintain runtime status information for that process instance. You can purge this information by changing the item type's Persistence to Temporary and running any of the `WF_PURGE` APIs. Then change the item type's Persistence back to Synchronous. See: *Synchronous, Asynchronous, and Forced Synchronous Processes, Oracle Workflow API Reference*.

Additionally, the administration script `wfrmtype.sql` is provided to delete runtime data for a particular item type. This script prompts you for an item type to purge from a list of valid item types, then asks you to choose between deleting all runtime data associated with the specified item type or deleting only runtime data for the completed activities and items of the specified item type. See: `Wfrmtype.sql`, page 7-11.



## **Related Topics**

WF\_PURGE, *Oracle Workflow API Reference*

Persistence Type, *Oracle Workflow Developer's Guide*



---

## Oracle Workflow Profile Options

This appendix lists the profile options that you can set to configure the version of Oracle Workflow embedded in Oracle Applications.

This appendix covers the following topics:

- Oracle Workflow Profile Options

### Oracle Workflow Profile Options

You can set the following profile options to configure the version of Oracle Workflow embedded in Oracle Applications. See: *Overview of Setting User Profiles, Oracle Applications System Administrator's Guide*.

### Applications SSO Login Types

If your site has implemented single sign-on with Oracle Internet Directory, this profile option determines how users can log in to Oracle Applications.

- SSO - User passwords are maintained only in Oracle Internet Directory. Users must log in to Oracle Applications through single sign-on.
- Local - User passwords are maintained only in Oracle Application Object Library. Users must log in through the local Oracle Applications login page.
- Both - User passwords are maintained both in Oracle Internet Directory and in Oracle Application Object Library. Users can log in to Oracle Applications either through single sign-on or through the local Oracle Applications login page. A user's single sign-on password can be different than that user's Oracle Application Object Library password.

Oracle Workflow supports password-based signatures for notifications based on Oracle Application Object Library passwords. If you have implemented single sign-on, you must set this profile option to either Local or Both for all users who need to enter password-based signatures. You must also ensure that these users have valid passwords defined in Oracle Application Object Library. See: *Implementing Password-based Signatures with Single Sign-On*, page 2-135.

Users can view this profile option but cannot update it.

System administrators can view and update this profile option only at the site and user levels.

The internal name for this profile option is APPS\_SSO\_LOCAL\_LOGIN.

For more information, see: Integrating Oracle E-Business Suite Release 11i with Oracle Internet Directory and Oracle Single Sign-On (Oracle*MetaLink* note 261914.1).

## **WF: GUEST Access to Notification**

This profile option helps control whether users must log in before they can access the Notification Details Web page from a notification. To enable guest access, which does not require an individual login, you must both set this profile option to Enabled and create a grant assigning the "Workflow Guest User permission set" to the GUEST user. See: Responses through the Notification Detail Link Attachment, page 2-74.

- Enabled - If the required grant has also been created, users can access the Notification Details page as the GUEST user, without an individual login.
- Disabled - Users must always log into Oracle Applications with their individual user names and passwords before they can access the Notification Details page.

Users can view and update this profile option.

System administrators can view and update this profile option only at the site level.

The internal name for this profile option is WF\_VALIDATE\_NTF\_ACCESS.

## **WF: Mailer Cancellation Email**

This profile option controls whether notification mailers send cancellation messages when previously sent notifications are canceled. See: Setting Up Notification Mailers, page 2-55.

- Enabled - Send cancellation messages. This setting is the default value for this profile option.
- Disabled - Do not send cancellation messages.

Users can view and update this profile option.

System administrators can view and update this profile option only at the site level.

The internal name for this profile option is WF\_MAIL\_CANCEL.

## **WF: Notification Reassign Mode**

This profile option controls how users can reassign notifications. See: Setting the WF: Notification Reassign Mode Profile Option, page 2-133.

- Delegate - Provides users access to delegate a notification to another user while still retaining ownership of the notification.
- Transfer - Provides users access to transfer complete ownership of a notification to another user.
- Reassign - Provides users access to both the Delegate and Transfer reassign modes. This setting is the default value for this profile option.

Users can view and update this profile option.

System administrators can view and update this profile option at the site, application, responsibility, and user levels.

The internal name for this profile option is FND\_NTF\_REASSIGN\_MODE.

## **WF: Vacation Rules - Allow All**

This profile option controls whether the list of item types for vacation rules includes the "All" option. The "All" option lets users create a rule that applies to notifications associated with any item type. See: Setting Up Vacation Rule Options, page 2-134.

- Enabled - The "All" option appears in the list of available item types for vacation rules. This setting is the default value for this profile option.
- Disabled - The "All" option does not appear in the list of available item types. Users must specify the item type to which the vacation rule applies.

After changing the value of this profile option, you must stop and restart Oracle HTTP Server for the change to take effect.

Users can view and update this profile option.

System administrators can view and update this profile option only at site level.

The internal name for this profile option is WF\_ROUTE\_RULE\_ALLOW\_ALL.

## **WF: Workflow Mailer Framework Web Agent**

This profile option specifies the host and port of the Web server that notification mailers use to generate the content for Oracle Applications Framework regions that are embedded in notifications. If this profile option is not set, notification mailers will use the same Web agent specified in the Application Framework Agent profile option. However, if necessary for load balancing purposes, you can optionally specify a different Web agent for notification mailers to use. See: Setting Up Notification Mailers, page 2-55.

Users can view and update this profile option.

System administrators can view and update this profile option only at site level.

The internal name for this profile option is WF\_MAIL\_WEB\_AGENT.



---

# Oracle Workflow Diagnostic Tests

This appendix describes the diagnostic tests that workflow administrators can run to check the setup of Oracle Workflow in an Oracle Applications installation.

This appendix covers the following topics:

- Oracle Workflow Diagnostic Tests

## Oracle Workflow Diagnostic Tests

Oracle Diagnostics provides a mechanism which makes Oracle Applications more supportable and robust by providing predefined tests to check for key setup requirements. Oracle Workflow provides several tests through Oracle Diagnostics that you can use to check the setup of Oracle Workflow in an Oracle Applications installation and review debugging information.

You can access Oracle Diagnostics through several different user interfaces, including Oracle Applications Manager as well as other administrative consoles. For more information, see: *Launching Oracle Diagnostics, Oracle Applications Supportability Guide*.

The Oracle Workflow tests are available in Oracle Diagnostics under the Application Object Library application.

## Workflow Tests

The following tests are available in the Workflow Tests group.

### Duplicate User Test

This test checks the Oracle Workflow directory service to verify that there are no roles in the WF\_LOCAL\_ROLES table with the same internal name, originating system, and originating system ID. This test does not require any input parameters.

If any duplicate roles are found, the test reports the internal name, display name, originating system, and originating system ID of those roles. Use this information to investigate and remove any invalid roles from your directory service. Otherwise, users may encounter errors when accessing their workflow processes and notifications. See: *Setting Up an Oracle Workflow Directory Service*, page 2-19.

### Notification Preference Validation Test

This test checks the Oracle Workflow directory service to ensure that all roles with a notification preference for receiving e-mail notifications have an e-mail address defined. This test does not require any input parameters.

If any roles with a notification preference for e-mail do not have an e-mail address defined, the test reports the internal name, display name, originating system, originating system ID, and notification preference of those roles. Enter e-mail addresses for these roles in the Oracle Workflow directory service to enable notification mailers to send them e-mail notifications. If any roles should not receive e-mail notifications, change the notification preference for those roles to QUERY ("Do not send me mail"). See: Implementing Notification Mailers, page 2-54, Setting Up an Oracle Workflow Directory Service, page 2-19, Setting Global User Preferences, page 2-11, and Preferences, *Oracle Applications User's Guide*.

## Rule Function Validation Test

This test checks the rule functions defined for subscriptions and the generate functions defined for events in the Business Event System. For PL/SQL functions, the test verifies that the package and function exist in the database and are valid. For Java functions, the test verifies that the Java class exists in the classpath. This test does not require any input parameters. See: Event Subscriptions, *Oracle Workflow Developer's Guide* and Events, *Oracle Workflow Developer's Guide*.

If any subscription rule functions or event generate functions are missing or invalid, the test reports the name and problem status for each function. You must make these functions available for the Business Event System to execute the corresponding subscriptions or generate the event data for the corresponding events. For PL/SQL functions, load the appropriate packages and standalone functions to the database, and recompile the schema that owns them. For Java functions, ensure that your classpath includes the JAR files containing the appropriate classes.

## GSM Setup Test

This test checks the Generic Service Management (GSM) setup required for Oracle Workflow in Oracle Applications Manager (OAM). Oracle Workflow implements service component containers for its Generic Service Component Framework as GSM service instances. The test verifies that GSM and the Oracle Workflow service instances are enabled. It also checks whether a high number of operating system processes have been created for a service instance in the last few minutes, which may indicate an error. This test does not require any input parameters.

The test reports the status of GSM and of the Oracle Workflow service instances.

- If GSM is disabled, set the Concurrent: GSM Enabled profile option to Y. See: Overview of Setting User Profiles, *Oracle Applications System Administrator's Guide*.
- If an Oracle Workflow service instance is disabled, enable it using OAM. Navigate to the Service Components page in Oracle Workflow Manager, and choose the appropriate service instance link in the Container column. In the Service Instances for Generic Service Component Container page, select the service instance, and select the Edit button. In the Edit page, select the Enabled check box. For more information, see the Oracle Applications Manager online help.
- OAM creates new operating system processes for a service instance each time the service instance is started. If a high number of operating system processes have been created for a particular service instance in the last few minutes, there may be an error that is causing that service instance to become continually deactivated and then restarted by OAM. Use the service instance log to investigate any possible errors. To view the log, navigate to the Service Components page in Oracle



Workflow Manager, select a service component belonging to the appropriate service instance, and choose the View Log button. You can also choose the service instance link in the Container column to review the current number of actual and target processes in the Service Instances for Generic Service Component Container page. For more information, see the Oracle Applications Manager online help.

## BES Clone Test

This test checks certain standard agents and subscriptions required for internal Business Event System and notification mailer processing to verify that they are enabled and that their definitions include the correct local system. You can use this test after cloning or migrating an Oracle Applications instance to ensure that the local system references have been updated correctly for the new instance. This test does not require any input parameters.

The test reports the name of the local system currently defined in the global workflow preferences, as well as the standard agents and subscriptions to events required for internal processing. For each agent, the report shows the agent name, system name, and status. For each subscription, the report shows the event name, subscription rule function together with the subscribing system, out agent, and status.

- If the local system name is incorrect, use the Workflow Configuration page to update the Local System preference. See: To Set Global Preferences for Oracle Workflow Embedded in Oracle Applications, page 2-15.
- If any agent is assigned to an incorrect system or is disabled, use the Update Agent page to update that agent definition. See: Agents, *Oracle Workflow Developer's Guide*.
- If any subscription has an incorrect subscribing system, has an out agent assigned to an incorrect system, or is disabled, use the Update Event Subscriptions page to update that subscription definition. See: Event Subscriptions, *Oracle Workflow Developer's Guide*.

## GSC Control Queue Test

This test verifies that the Workflow control queue, WF\_CONTROL, is properly accessible. The Generic Service Component Framework uses this queue to handle control events for containers and service components. This test does not require any input parameters.

The test reports whether it was able to establish a JMS connection to the WF\_CONTROL queue and dequeue a message from the queue.

- If the required JMS libraries are not included in the `appsorg2.zip` file referenced in your `AF_CLASSPATH`, perform the following steps:
  - Verify that JDK (Java Development Kit) 1.3 is installed on the concurrent processing node, patch 2356331 has been applied, and you have performed all post-installation steps described in Oracle *MetaLink* note 130091.1, "Upgrading to JDK 1.3 with Oracle Applications 11i". Ensure that the environment variables `AF_JRE_TOP`, `AF_CLASSPATH`, and `AFJVAPRG` are set correctly in `adovars.env`. The `AF_CLASSPATH` must include the `appsorg2.zip` file.

For example, on Unix:

```
AF_CLASSPATH=[JDK13_TOP]/lib/dt.jar:[JDK13_TOP]/lib/tools.jar:
[JDK13_TOP]/jre/lib/rt.jar:[JDK13_TOP]/jre/lib/i18n.jar:
$JAVA_TOP/appsorg2.zip:$JAVA_TOP/apps.zip:
$ORACLE_HOME/forms60/java:$JAVA_TOP
```

where [JDK13\_TOP] is the full path to the JDK 1.3 installation top directory on Unix.

On Windows:

```
AF_CLASSPATH=[JDK13_TOP]\lib\dt.jar;[JDK13_TOP]\lib\tools.jar;
[JDK13_TOP]\jre\lib\rt.jar;[JDK13_TOP]\jre\lib\i18n.jar;
[JAVA_TOP]\appsborg2.zip;[JAVA_TOP]\apps.zip;
[8.0.6_ORACLE_HOME]\forms60\java;[JAVA_TOP]
where [JDK13_TOP] is the full path to the JDK 1.3 installation top
directory, [JAVA_TOP] is the full path to %JAVA_TOP%, and [8.0.6
ORACLE_HOME] is the full path to %ORACLE_HOME%.
```

- Verify that the appsborg2.zip file contains the required JMS classes. Execute the following command:

```
unzip -l $JAVA_TOP/appsborg2.zip | grep -i jms | wc -l
This command should return the count 128 if the required JMS classes are
present. If it returns 0 (zero), then you need to add the required classes into
appsborg2.zip. First verify that the $APPL_TOP/admin/adjborg2.txt
file contains entries for the required classes, jmscommon.jar and
aqapi.jar. Execute the following command:
```

```
grep jar $APPL_TOP/admin/adjborg2.txt
Ensure that the output includes entries for jmscommon.jar and
aqapi.jar. For example:

/d01/vis1159/oracle/visora/ias/rdbms/jlib/aqapi.jar
/d01/vis1159/oracle/visora/ias/rdbms/jlib/jmscommon.jar
```

Then use the AD Administration utility (adadmin) to regenerate product JAR files. Within adadmin, choose the Generate Applications Files menu option and choose the Generate product jar files task. At the prompt that asks whether you want to force generation of all JAR files, enter Yes. See: File System Tasks, *Oracle Applications AD Utilities Reference Guide*.

- If dead subscribers are not being regularly removed from the WF\_CONTROL queue, ensure that a recurring concurrent request is scheduled in your Oracle Applications instance for a concurrent program named Workflow Control Queue Cleanup (FNDWFBES\_CONTROL\_QUEUE\_CLEANUP). If you do not have this request scheduled, perform the following steps:
  - Terminate the service instances for Oracle Workflow in Oracle Applications Manager. Navigate to the Service Components page in Oracle Workflow Manager, and choose a service instance link in the Container column. In the Service Instances for Generic Service Component Container page, terminate each service instance. For more information, see the Oracle Applications Manager online help.
  - Submit a concurrent request for the Workflow Control Queue Cleanup program (FNDWFBES\_CONTROL\_QUEUE\_CLEANUP) for immediate execution. See: Cleaning Up the Workflow Control Queue, page 2-155.
  - Submit another request for the Workflow Control Queue Cleanup program to run periodically, so that the WF\_CONTROL queue will be cleaned of dead subscribers regularly. The recommended interval for performing cleanup is every six to twelve hours. See: Cleaning Up the Workflow Control Queue, page 2-155.

- After the first concurrent request has completed, restart the service instances for Oracle Workflow. Navigate back to the Service Instances for Generic Service Component Container page in Oracle Applications Manager and restart each service instance. For more information, see the Oracle Applications Manager online help.

**Note:** You should not restart the service instances until the initial cleanup performed by the first Workflow Control Queue Cleanup request is finished.

- If the test could not successfully remove a dead subscriber from the WF\_CONTROL queue, the queue may need to be dropped and recreated. Contact Oracle Support for instructions.
- If your database version is Oracle9i Release 2 and the SYS.DBMS\_AQIN package is missing the required third signature for the AQ\$\_DEQUEUE\_IN procedure, download and apply patch 2805491, available from [OracleMetaLink](#).
- If the SYS.DBMS\_AQIN package is invalid, Oracle Streams Advanced Queuing may not be properly installed in the database. Contact Oracle Support for instructions.

For more information, see the "About Oracle Workflow" document for your Oracle Workflow mini-pack on [OracleMetaLink](#).

### Workflow Advanced Queue Rule Validation Test

This test checks the standard WF\_ERROR and WF\_DEFERRED queues to verify that only one subscriber rule is defined for each queue. These queues are reserved for internal Oracle Workflow processing. You should not add any custom subscribers to these queues. This test does not require any input parameters. See: Standard Agents, *Oracle Workflow Developer's Guide*.

If either queue has more than one subscriber rule defined, the test reports the queue name and the invalid rules. Remove any custom subscribers that have been added to the queues. See: Managing Subscribers, *Oracle Streams Advanced Queuing User's Guide and Reference*.

### Workflow Agents/AQ Status Test

This test checks the Business Event System agents for Oracle Workflow and Oracle XML Gateway, as well as the queues associated with these agents. The test verifies that the agents are enabled within the Business Event System. It also verifies that the queues and the queue tables in which they reside are valid database objects, and that the queues are enabled for enqueueing and dequeuing within Oracle Streams Advanced Queuing (AQ). This test does not require any input parameters. See: Oracle Streams AQ Administrative Interface, *Oracle Streams Advanced Queuing User's Guide and Reference*.

The test reports the status of the agents, queues, and queue tables, and also shows the subscribers and subscriber rules defined for the queues.

- If an agent is disabled, you can edit the agent definition in the Event Manager Web pages to set its status to Enabled. See: To Create or Update an Agent, *Oracle Workflow Developer's Guide*.
- If a queue is not enabled for enqueueing or dequeuing, you can stop the queue and restart it with these operations enabled, using the DBMS\_AQADM.Stop\_Queue and

DBMS\_AQADM.Start\_Queue APIs. See: *Managing Queues, Oracle Streams Advanced Queuing User's Guide and Reference*.

- If any queues or queue tables are invalid, contact Oracle Support for instructions.

### Workflow Objects Validity Test

This test checks the Oracle Workflow and Oracle XML Gateway database objects to verify that all the objects are valid. This test does not require any input parameters.

If any invalid objects are found, the test reports the name and type of those objects. Recompile those objects and ensure that they are valid.

### XML Parser Installation Test

This test checks your Oracle Applications installation to verify that the Oracle XML parser is installed and valid. This test does not require any input parameters.

The test reports the version of the XML parser you have installed and shows the status of the XMLDOM PL/SQL package or xmlparser Java source object in each schema. If any XML parser object is invalid, reinstall the XML parser for that schema. To install the XML parser version 2.0.2.9, download and apply patch 2199206, available from [OracleMetaLink](#). For more information, see the "About Oracle Workflow" document for your Oracle Workflow mini-pack on [OracleMetaLink](#).

### Mailer Component Test

This test checks your notification mailer service components to verify that at least one notification mailer has been configured with all the parameters needed to run it. This test does not require any input parameters.

If your installation does not include any notification mailer components with a completed configuration, the test reports that no notification mailer is configured. Navigate to the Service Components page in Oracle Workflow Manager to configure a notification mailer service component. You can either complete the configuration of the seeded Workflow Notification Mailer component, or create a new custom notification mailer component. See: *Implementing Notification Mailers*, page 2-54 and the Oracle Workflow Manager online help.

**Note:** This test does not report whether a configured notification mailer is currently running. You can use the Service Components page in Oracle Workflow Manager to check the current status of your notification mailer service components.

### Mailer Component Parameter Test

This test checks your notification mailer service components to validate their configuration parameters. The test checks only those notification mailers for which all the mandatory configuration parameters have been defined. This test does not require any input parameters.

If any notification mailer has invalid configuration parameters, the test reports the errors. Navigate to the Service Components page in Oracle Workflow Manager to edit the configuration of a notification mailer. For some parameters, you may also need to check the corresponding setup outside the notification mailer.

- Ensure that your SMTP server is accessible and able to accept connections, and that the reply-to e-mail address defined for the notification mailer has a valid account on the SMTP server.
- Ensure that your IMAP server is accessible and able to accept connections, that the inbound username defined for the notification mailer has a valid account on the IMAP server, and that you can connect to the IMAP server from an e-mail client using the inbound username and password.
- Ensure that the inbox, processed folder, and discard folder defined for the notification mailer exist within the inbound e-mail account, and that these are three separate folders.
- Ensure that the HTML agent defined for the notification mailer is accessible and that the Web listener is processing requests.
- Ensure that all messages defined as message templates for the notification mailer are loaded in your database, together with the item types to which the messages belong.

See: Implementing Notification Mailers, page 2-54 and the Oracle Workflow Manager online help.

## Mailer Tests

The following test is available in the Mailer Tests group.

### Mailer Diagnostic Test

This test reports details about a notification and about the notification mailer that sent the notification. You can use this information to check the status of a particular notification or to investigate errors. Use the Advanced tab within Oracle Diagnostics to enter the notification ID (NID) of the notification that you want to review and run the test. See: Implementing Notification Mailers, page 2-54.

**Note:** You can also obtain this information through SQL\*Plus using the `wfmlrdbg.sql` script. See: `Wfmlrdbg.sql`, page 7-8.



---

# Frequently Asked Questions for Standalone Oracle Workflow

This appendix provides answers to frequently asked questions about installing and configuring the standalone version of Oracle Workflow.

This appendix covers the following topics:

- Frequently Asked Questions for Standalone Oracle Workflow

## Frequently Asked Questions for Standalone Oracle Workflow

The following sections provides answers to frequently asked questions about installing and configuring the standalone version of Oracle Workflow.

- How can I verify my Oracle Workflow installation?, page E-2
- How can I compile invalid objects after installation?, page E-2
- How can I handle a "WorkflowDS not found" error?, page E-2
- How can I manually set the Oracle Workflow Web agent?, page E-2
- How can I verify the Oracle Workflow virtual directory mappings?, page E-3
- How can I ensure that icons appear on Oracle Workflow pages?, page E-4
- How can I access the online help for Oracle Workflow pages?, page E-4
- How can I change Oracle Workflow configuration parameters after installation?, page E-4
- How can I access existing user information after integrating with Oracle Internet Directory?, page E-5
- How can I load the DBMS\_LDAP package?, page E-5
- How can I give database users access to the Oracle Workflow Web pages?, page E-5
- How can I change my directory service implementation after installation?, page E-6
- How can I access the Oracle Workflow demonstration users?, page E-9
- How can I enable custom packages in the Oracle Workflow DAD, page E-9
- How can I ensure that propagation is executed for Business Event System queues?, page E-9
- Can I export and import the Oracle Workflow schema?, page E-10

- Can I install more than one Oracle Workflow schema in the same database?, page E-10
- Can I use Oracle Workflow in an Oracle Real Application Clusters (RAC) database?, page E-10
- How can I remove an Oracle Workflow installation?, page E-10
- How can I manually register files for an Oracle Workflow client installation?, page E-10
- How can I modify the font in Oracle Workflow Builder?, page E-11

## How can I verify my Oracle Workflow installation?

Use the wfver.sql script to display the version of the Oracle Workflow server, the status and version of the Oracle Workflow PL/SQL packages, and the version of the Oracle Workflow views installed. See: Wfver.sql, page 7-12.

## How can I compile invalid objects after installation?

Run the utlrlp.sql script to compile any invalid objects in the SYS schema after completing the Oracle Workflow installation. This script is located in the `ORACLE_HOME/rdbms/admin` directory. Run the script as the SYS user. For example, use the following command:

```
@$ORACLE_HOME/rdbms/admin/utlrlp.sql
```

## How can I handle a "WorkflowDS not found" error?

Due to a known issue in bug 3541376, after you install and configure Oracle Workflow using the Workflow Configuration Assistant, the following error message may appear in the Workflow installation log file (`workflow.log`):

```
<date> <time> oracle.apps.fnd.cp.gsc.SvcComponentContainerException:
oracle.apps.fnd.wf.common.ContextFactoryException:
Unable to get initial context because the following Exception
occurred ->
javax.naming.NameNotFoundException:
jdbc/WorkflowDS not found
```

As a workaround, ignore the message and start the containers required for the Oracle Workflow Manager component in Oracle Enterprise Manager to create the data sources. After the data sources are created, this error should no longer appear. For instructions on starting the containers, see the *Oracle Database Companion CD Installation Guide*.

## How can I manually set the Oracle Workflow Web agent?

The Oracle Workflow Web agent must be defined before you can access Oracle Workflow's Web pages. If necessary, you can load this value manually using a script called wftoken.sql. This script is located in the `ORACLE_HOME/wf/sql` directory. Connect to SQL\*Plus with the Oracle Workflow database account and run the script using the following command:

```
sqlplus <username> / <pwd> @wftoken WF_WEB_AGENT <web_agent_value>
Replace <web_agent_value> with the Oracle Workflow Web agent name in the
following format:
```



`http://<host:portID>/pls/wf`

where `<host:portID>` represents the host server and TCP/IP port number on which your Web listener accepts requests, and `wf` is the default Database Access Descriptor (DAD) created during the Oracle Workflow middle tier installation.

## How can I verify the Oracle Workflow virtual directory mappings?

The Oracle Workflow Web interface requires three virtual directory mappings, which are set by default during installation and configuration. If necessary, you can manually verify and add or edit the virtual directory mappings.

- Oracle Workflow requires a virtual directory mapping called `/OA_JAVA/` in your Web listener that points to the Oracle Workflow JAR files on your file system. The JAR files are in a directory called `ORACLE_HOME/jlib`. The Oracle Universal Installer automatically installs the Java code in this directory when you install or upgrade the Oracle Workflow middle tier components.
- Oracle Workflow requires a virtual directory mapping called `/OA_MEDIA/` that points to the Oracle Workflow icon area on your file system. The icon area is `ORACLE_HOME/wf/java/oracle/apps/fnd/wf/icons/`, within your middle tier Oracle home. All icon and gif files that are required by the Oracle Workflow Web interface must be stored in the `/OA_MEDIA/` virtual directory.
- Oracle Workflow requires a virtual directory mapping called `/OA_DOC/` that points to the Oracle Workflow documentation area on your file system. The documentation area is `ORACLE_HOME/wf/doc`. This area contains the context-sensitive HTML help files for Oracle Workflow Web pages.

To manually add the required virtual directory mappings in Oracle HTTP Server, add aliases for the `jlib` directory and the Oracle Workflow icon and documentation areas to the `ORACLE_HOME/wf/admin/wf.conf` file. The path to this configuration file must be included in the `ORACLE_HOME/Apache/Apache/conf/oracle_apache.conf` file which helps define the behavior of Oracle HTTP Server. Add the aliases using the following format:

- On UNIX:

```
Alias /OA_JAVA/ "$ORACLE_HOME/jlib/"
Alias /OA_MEDIA/ "$ORACLE_HOME/wf/java/oracle/apps/fnd/wf/icons/"
Alias /OA_DOC/ "$ORACLE_HOME/wf/doc/"
```

For example:

```
...
#
# Aliases: Add here as many aliases as you need (with no limit).
# The format is
# Alias fakename realname
#
...
Alias /OA_JAVA/ "/oraclean/jlib/"
Alias /OA_MEDIA/ "/oraclean/wf/java/oracle/apps/fnd/wf/icons/"
Alias /OA_DOC/ "/oraclean/wf/doc/"
...
```

- On Windows:

```
Alias /OA_JAVA/ "ORACLE_HOME\jlib/"
Alias /OA_MEDIA/ "ORACLE_HOME\wf\java\oracle\apps\fnd\wf\icons/"
Alias /OA_DOC/ "ORACLE_HOME\wf\doc/"
```

For example:

```
...
#
# Aliases: Add here as many aliases as you need (with no limit).
# The format is
# Alias fakename realname
#
...
Alias /OA_JAVA/ "C:\oraclean\jlib/"
Alias /OA_MEDIA/ "C:\oraclean\wf\java\oracle\apps\wnd\wf\icons/"
Alias /OA_DOC/ "C:\oraclean\wf\doc/"
...
```

Ensure that you add a trailing slash to each alias name and physical directory path. After adding the aliases, restart Oracle HTTP Server.

## How can I ensure that icons appear on Oracle Workflow pages?

If the icons on the Oracle Workflow Web pages appear as broken images, check the virtual directory mapping to the Oracle Workflow /OA\_MEDIA/ icon area.

## How can I access the online help for Oracle Workflow pages?

Before you can view the Oracle Workflow HTML help, you must extract the doc directory from the ORACLE\_HOME\wf\wfdoc.zip file to your file system. Use an unzip utility to extract the doc directory into the wf directory. You need at least 5 Mb of free disk space to extract the zip file. After the extraction, you can optionally remove the zip file. Also, check the virtual directory mapping to the Oracle Workflow /OA\_DOC/ documentation area.

You can now view the HTML help using a Web browser. Choose the Help button on any Oracle Workflow Web page to access the HTML help. You can also access any HTML help file directly by appending its virtual path to your Web listener base URL. The path for the contents page of the Oracle Workflow help is:

`http://host:portID/OA_DOC/lang/wf/toc.htm`

If you want to add custom help, you can replace the `ORACLE_HOME/wf/doc/lang/wfcust/wfcust.htm` placeholder file with your own help material. The HTML file that is the main entry point for your custom help must be named `wfcust.htm` and must contain an anchor named `contents`. Your custom help will be accessible through the Custom Help link on the contents page of the Oracle Workflow help, or you can access your custom help directly through the following path:

`http://host:portID/OA_DOC/lang/wfcust/wfcust.htm`

You can also view context-sensitive help for the Oracle Workflow Builder in Winhelp format by choosing Contents from the Help menu within the Oracle Workflow Builder.

## How can I change Oracle Workflow configuration parameters after installation?

You can update your LDAP configuration parameters in the Global Workflow Preferences Web page. See: To Set Global Preferences for Standalone Oracle Workflow, page 2-11.

You can update the configuration parameters for the Workflow Notification Mailer using the notification mailer configuration wizard in Oracle Workflow Manager. If you installed Oracle Workflow along with Oracle Application Server, access Oracle Workflow Manager from the Oracle Enterprise Manager Application Server Control. If you

installed Oracle Workflow along with Oracle Database, access Oracle Workflow Manager as part of the Oracle Enterprise Manager Database Control. For more information, see the installation documentation for your release and the Oracle Workflow Manager online help.

## How can I access existing user information after integrating with Oracle Internet Directory?

If you upgrade a previous installation of Oracle Workflow, and you choose to integrate with Oracle Internet Directory for the first time, migrate your Oracle Workflow user information to Oracle Internet Directory. You must perform a one-time migration to enable single sign-on and single administration of your existing user information. Ensure that you migrate all the necessary data from the WF\_LOCAL\_ROLES table as well as any other tables in which you previously stored user information. After performing the migration, you should maintain your user information only through Oracle Internet Directory.

Oracle Internet Directory provides a migration tool called `ldifmigrator`. To use this tool, you must extract your user information from the database into an intermediate LDAP Data Interchange Format (LDIF) file, with substitution variables wherever necessary. The `ldifmigrator` tool converts the intermediate entries in the file to actual LDIF entries by replacing the variables based on arguments provided at runtime or information retrieved from the LDAP directory. The LDIF file produced by the `ldifmigrator` can then be uploaded into Oracle Internet Directory using Oracle Internet Directory bulk tools.

For more information about the `ldifmigrator`, the format required for the intermediate LDIF file, and Oracle Internet Directory bulk upload tools, see: *ldifmigrator, Oracle Identity Management User Reference*.

## How can I load the DBMS\_LDAP package?

The DBMS\_LDAP package contains the functions and procedures that can be used to access data from LDAP servers and is required for LDAP synchronization. If you run the Oracle Universal Installer and the Oracle Workflow Configuration Assistant specifying LDAP values for Oracle Internet Directory integration, without having the DBMS\_LDAP package installed in your database, you may encounter invalid packages after the Oracle Workflow Configuration Assistant completes. In this case, load the package manually by running the `catldap.sql` script located in the `ORACLE_HOME/rdbms/admin` directory. Run this script as the SYS user. For example, use the following command:

```
sqlplus "SYS/<SYS password> as sysdba" @$ORACLE_HOME/rdbms/admin/  
catldap.sql
```

After loading DBMS\_LDAP, recompile the Oracle Workflow schema. See: *Oracle Database Supplied PL/SQL Packages and Types Reference*.

## How can I give database users access to the Oracle Workflow Web pages?

Grant database users the `wf_plsql_ui` database role to provide them with privileges to access the Oracle Workflow Web pages. See: *Integrating Oracle Workflow Directory Services with Oracle Database Users*, page 2-22.

## How can I change my directory service implementation after installation?

If you no longer want to use the type of directory service you chose during installation, you can change your directory service implementation after the initial installation and configuration are complete.

### To convert from Oracle Database users to Oracle Internet Directory:

1. Ensure that the DBMS\_LDAP PL/SQL package is loaded in your database. This package contains the functions and procedures that can be used to access data from LDAP servers and is required for LDAP synchronization. To check whether the DBMS\_LDAP package is already installed, connect to SQL\*Plus and use the following command:

```
desc DBMS_LDAP
```

If the DBMS\_LDAP package does not already exist, load it manually by running the `catldap.sql` script located in the `ORACLE_HOME/rdbms/admin` directory. Run this script as the SYS user. For example, use the following command:

```
sqlplus "SYS/<SYS password> as sysdba" @$ORACLE_HOME/rdbms/admin/catlldap.sql
```

2. Run the `ORACLE_HOME/wf/sql/wfdircsv.sql` script to implement Oracle Workflow directory service views that support Oracle Internet Directory integration. For example, use the following command:

```
sqlplus owf_mgr/<passwd> @$ORACLE_HOME/wf/sql/wfdircsv.sql
```

3. Load the appropriate version of the WFA\_SEC package, which contains Oracle Workflow security functions and procedures. To load this package, log on to SQL\*Plus as the Oracle Workflow database user and run the `ORACLE_HOME/wf/sql/wfsecssb.sql` script. For example, use the following command:

```
sqlplus owf_mgr/<passwd> @$ORACLE_HOME/wf/sql/wfsecssb.sql
```

4. Update the Database Access Descriptor (DAD) for Oracle Workflow in the Oracle HTTP Server `dads.conf` file, specifying the following parameters. You can either use Oracle Enterprise Manager to update the DAD or edit the `dads.conf` file directly. The DAD should be named `/pls/your_Workflow_DAD`. For example: `/pls/wf`
  - `PlsqlDatabaseUsername` - If you installed Oracle Workflow shipped with Oracle Application Server and you want to integrate with Oracle Application Server Single Sign-On, then enter the Oracle Workflow schema. If you are not integrating with Oracle Application Server Single Sign-On, then leave this field blank.
  - `PlsqlDatabasePassword` - If you installed Oracle Workflow shipped with Oracle Application Server and you want to integrate with Oracle Application Server Single Sign-On, then enter the Oracle Workflow schema password. If you are not integrating with Oracle Application Server Single Sign-On, then leave this field blank.
  - `PlsqlDatabaseConnectionString` - Database connect string
  - `PlsqlDefaultPage` - `wfa_html.home`
  - `PlsqlSessionStateManagement` - `StatelessWithResetPackageState`
  - `PlsqlAuthenticationMode` - `Basic`

After you update the DAD, restart Oracle HTTP Server.

5. If you installed Oracle Workflow shipped with Oracle Application Server and you want to integrate with Oracle Application Server Single Sign-On, protect the Oracle Workflow DAD by adding the following entry in your `mod_osso` configuration file. Replace `your_Workflow_DAD` with the name of your DAD.

```
<Location /pls/your_Workflow_DAD>
    require valid-user
    authType Basic
</Location>
```

For more information, see: *Developing Applications Using mod\_osso, Oracle Identity Management Application Developer's Guide*.

After you update the `mod_osso` configuration file, restart Oracle HTTP Server.

6. Set the following LDAP preferences in the Global Workflow Preferences page. See: *To Set Global Preferences for Standalone Oracle Workflow*, page 2-11.
  - LDAP Host
  - LDAP Port
  - LDAP User Name
  - LDAP Password
  - LDAP Changelog Base Directory
  - LDAP User Base Directory
7. Migrate your existing Workflow user information to Oracle Internet Directory. See: *How can I access existing user information after integrating with Oracle Internet Directory?*, page E-5
8. Perform an initial synchronization of your Oracle Workflow directory service with Oracle Internet Directory by running the `WF_LDAP.Synch_all( )` API. Because `Synch_all( )` retrieves information for all users stored in Oracle Internet Directory, you should use this function only once during setup. If necessary, however, you can also run `Synch_all( )` as required for recovery or cleanup.

Use the following commands to run `Synch_all( )`:

```
declare
    res boolean := FALSE;
begin

    res := wf_ldap.synch_all();
    if (res) then
        dbms_output.put_line('succeeded');
    else
        dbms_output.put_line('failed ');
    end if;
end;
/
```

9. Use the `WF_LDAP.Schedule_Changes()` API to periodically synchronize your Oracle Workflow directory service with Oracle Internet Directory. See: *Synchronizing Workflow Directory Services with Oracle Internet Directory*, page 2-40.

## To convert from Oracle Internet Directory to Oracle Database users:

1. Stop any database jobs you have scheduled to execute the WF\_LDAP APIs to synchronize your Oracle Workflow directory service with Oracle Internet Directory. See: Synchronizing Workflow Directory Services with Oracle Internet Directory, page 2-40.
2. Update the Database Access Descriptor (DAD) for Oracle Workflow in the Oracle HTTP Server `dads.conf` file, specifying the following parameters. You can either use Oracle Enterprise Manager to update the DAD or edit the `dads.conf` file directly. The DAD should be named `/pls/your_Workflow_DAD`. For example: `/pls/wf`

- `PlsqlDatabaseConnectionString` - Database connect string
- `PlsqlDefaultPage` - `wfa_html.home`
- `PlsqlSessionStateManagement` - `StatelessWithResetPackageState`
- `PlsqlAuthenticationMode` - `Basic`

Ensure that you do not specify a database user name or password, in order to enable `mod_plsql` database authentication.

After you update the DAD, restart Oracle HTTP Server.

3. If you installed Oracle Workflow shipped with Oracle Application Server and your installation automatically integrated with Oracle Application Server Single Sign-On, delete the entry for your Workflow DAD from the `mod_osso` configuration file.

After you update the `mod_osso` configuration file, restart Oracle HTTP Server.

4. Run the `ORACLE_HOME/wf/sql/wfdirouv.sql` script to map the Oracle Workflow directory service views to your Oracle Database users and roles. For example, use the following command:

```
sqlplus owf_mgr/<passwd> @$ORACLE_HOME/wf/sql/wfdirouv.sql
```

The `wfdirouv.sql` script sets each native Oracle Database user's e-mail address to the user's respective username. As a minimal setup step, you should edit the script to either link your native Oracle Database users to an existing mail directory store through the `WF_ROLES` view definition or, if the usernames and e-mail account names match, then simply add the domain for your organization, such as `@oracle.com`, to the usernames in the `WF_USERS` view definition. Typically, the columns that you change are `EMAIL_ADDRESS` in `WF_USERS` and `EMAIL_ADDRESS` in `WF_ROLES`. See: Integrating Oracle Workflow Directory Services with Oracle Database Users, page 2-22,

5. Load the appropriate version of the `WFA_SEC` package, which contains Oracle Workflow security functions and procedures. To load this package, log on to SQL\*Plus as the Oracle Workflow database user and run the `ORACLE_HOME/wf/sql/wfsecwsb.sql` script. For example, use the following command:

```
sqlplus owf_mgr/<passwd> @$ORACLE_HOME/wf/sql/wfsecwsb.sql
```

6. Clear the following LDAP preferences in the Global Workflow Preferences page. See: To Set Global Preferences for Standalone Oracle Workflow, page 2-11.
  - LDAP Host
  - LDAP Port

- LDAP User Name
- LDAP Password
- LDAP Changelog Base Directory
- LDAP User Base Directory

## How can I access the Oracle Workflow demonstration users?

When you install Oracle Workflow and its demonstration workflow processes, you also install a demonstration data model that seeds a set of demonstration users in the directory service. The users are `sysadmin`, `wfadmin`, `blewis`, `cdouglas`, `kwalker`, and `spierson`. Their passwords are the same as their usernames.

For security reasons, the installation process automatically locks the demonstration user accounts after they are created. Before you can begin using the accounts, you must unlock them using a script called `wfdemoul.sql`. This script is located in the `ORACLE_HOME/wf/demo` directory. Connect to the `SYSTEM` database account using `SQL*Plus` and run the script using the following command:

```
sqlplus SYSTEM/<SYSTEM pwd> @wfdemoul
```

See your Oracle DBA if you need more information about the `SYSTEM` account and password.

- If you are using Oracle Database users and roles as your directory repository, then the Workflow installation creates the demonstration users as database accounts. In this case you can authenticate yourself with a demonstration database username and password to access Oracle Workflow Web pages.
- If you chose to integrate with Oracle Internet Directory as your directory repository by entering LDAP values in the Oracle Workflow Configuration Assistant, then the demonstration users are created as ad hoc users in the Workflow local directory service tables. In this case you must migrate the user information for the demonstration users to Oracle Internet Directory before you can access Oracle Workflow Web pages with these user names and passwords. See: *How can I access existing user information after integrating with Oracle Internet Directory?*, page E-5

## How can I enable custom packages in the Oracle Workflow DAD?

If you create custom PL/SQL packages for Web pages that you want to display through the Oracle Workflow Database Access Descriptor (DAD), you must add your custom packages to the list of valid Web packages maintained in the `WF_WEB_CONFIG` package. Edit the `wfwbcfgb.pls` file in the `$ORACLE_HOME/wf/sql` directory to add your packages to the `g_packages` list. Enter the package names at the end of the list, in upper case, between single quotation marks.

## How can I ensure that propagation is executed for Business Event System queues?

Oracle Workflow leverages Oracle Advanced Queuing, which requires job queue processes to handle message propagation. The minimum recommended number of processes for Oracle Workflow is ten. If you schedule propagation for your Business Event System queues but no processes are being allocated to execute the propagation, you may need to increase the `JOB_QUEUE_PROCESSES` database initialization parameter to ensure the processes are available for propagation. Use Oracle Workflow Manager to check the setting of the `JOB_QUEUE_PROCESSES` parameter for your instance.

## Can I export and import the Oracle Workflow schema?

Yes. Beginning in Release 2.6.4, you can export and import the standalone Oracle Workflow schema to transfer its data objects between Oracle databases. The default schema name is `owf_mgr`. Use either the Oracle Data Pump export and import utilities or the original export and import utilities. See: *Oracle Database Utilities*.

## Can I install more than one Oracle Workflow schema in the same database?

No. You can only install one Oracle Workflow schema per Oracle home. Otherwise, you may encounter errors in the Oracle Workflow middle tier services.

If you need to recreate the Oracle Workflow schema, you must first drop the existing schema and deinstall Oracle Workflow. Then follow the instructions in your installation documentation to reinstall Oracle Workflow and create a new Oracle Workflow schema using the Oracle Workflow Configuration Assistant.

While you have an Oracle Workflow schema configured in your database, you must not rerun the Oracle Workflow Configuration Assistant with any install option other than `Add Language`.

## Can I use Oracle Workflow in an Oracle Real Application Clusters (RAC) database?

Installing the Oracle Workflow schema in a RAC database is supported. You may choose to do so for performance and scalability reasons. However, be aware that Oracle Workflow components outside the database run on only one of the nodes in a RAC environment. These components include Oracle Workflow Manager and service components such as notification mailers and agent listeners.

## How can I remove an Oracle Workflow installation?

To remove Oracle Workflow:

1. Use Oracle Universal Installer to deinstall Oracle Workflow server or the Oracle Workflow middle tier components.
2. Drop the Oracle Workflow schema from the database. Log in to the database as the SYS user and enter the following command:

```
drop user Workflow_schema_name cascade
```

For example:

```
drop user owf_mgr cascade
```

## How can I manually register files for an Oracle Workflow client installation?

In some cases you may see the following error message while installing Oracle Workflow client components: "Error encountered when registering *filename*, please run `regsvr32.exe` manually to register this file after the installation completes". For example, you may see this error for the `wfnvg.ocx` file.

If you encounter this error, close the error message and proceed with the installation. After the installation is complete, register the specified file manually by running the following command from a DOS prompt:

```
regsvr32 path\filename
```



Replace *path* with the path to the file and *filename* with the name of the file to register. The `wfnvg.ocx` file is normally located in the `ORACLE_HOME\bin` directory.

### **How can I modify the font in Oracle Workflow Builder?**

If you install the Oracle Workflow Builder in another language such as Japanese, you can modify the font used by the windows in the Oracle Workflow Builder to a font that is appropriate for your language. For example, when using the Oracle Workflow Builder in Japanese, you might choose the font MS PGothic. Any change you make applies to all windows within the program. See: *Modifying Fonts in Oracle Workflow Builder*, *Oracle Workflow Developer's Guide*.



---

# 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 or stuck processes.

## **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.

**Concurrent Manager**

An Oracle Applications component that manages the queuing of requests and the operation of concurrent programs.

**Concurrent Process**

An instance of running a non-interactive, data-dependent function, simultaneously with online operations. Each time you submit a request, a concurrent manager processes your request, starts a concurrent process, and runs a concurrent program.

**Concurrent Program**

A concurrent program is an executable file that performs a specific task, such as posting a journal entry or generating a report.

**Concurrent Queue**

A list of concurrent requests awaiting completion by a concurrent manager. Each concurrent manager has a queue of requests waiting in line to be run. If your system administrator sets up your Oracle Application to have simultaneous queuing, your request can wait to run in more than one queue.

**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.

**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.

**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. 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 are 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 Worklist**

A Web page that you can access 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, which can be saved as a flat file or in a database.

**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

---

- Access Level, 6-2
  - default, 6-5
- Access protection
  - Access level, 6-1
  - Business Event System objects, 6-6
  - Protection level, 6-1
  - workflow objects, 6-1
- Activities
  - External Java functions, 2-140
  - icons, 2-140
- Activity versions, 7-12
- Adding Worklist functions to responsibilities, 2-132
- Administrator home page, 4-3
- Administrator Monitor
  - activity history, 5-14
  - child workflows, 5-13
  - overview, 5-10
  - participant responses, 5-18
  - searching for workflows, 5-11
  - status diagram, 5-16
  - testing access, 5-33
  - workflow details, 5-19
  - workflow errors, 5-20
- Administrator privileges, 2-11, 2-15
- Agents
  - scheduling listeners, 2-151
  - scheduling propagation, 2-153
- Applications SSO Login Types profile option, C-1
- Asynchronous processes, B-1
- Automatic notification routing, 4-5

## B

---

- Background engine
  - scripts, 7-5
- Background Engines
  - about, 2-50
  - scripts, 7-4
  - starting, 2-51
  - submitting, 2-52
- BES Clone Test, D-3
- Bulk synchronization
  - of directory service information, 2-26, 2-28
- Business Event System, 1-2

- access protection, 6-6
- checking setup, 2-150
- setting up, 2-145

## C

---

- Capicom.dll, 2-18
- Certificate-based signatures
  - Capicom.dll location, 2-18
- Concurrent program
  - FNDWFPR, 7-3
- Concurrent programs
  - Synchronize Product License and Workflow BES License, 2-154
  - Synchronize WF LOCAL Tables, 2-26
  - Workflow Background Process, 2-52
  - Workflow Control Queue Cleanup, 2-156
  - Workflow Definitions Loader, 6-10
- Custom logos
  - in Web pages, 2-139
- Customization level
  - Business Event System objects, 6-6
  - workflow objects, 6-3

## D

---

- Database links
  - creating, 2-146
- DBA Studio, 2-146, 2-149
- Deferred activities, 2-50
  - performance, B-5
- Deferred processing
  - for workflow processes, 2-50, B-5
- Deinstalling Oracle Workflow, E-10
- Delegating notifications, 2-133
- Delete
  - all workflow data, 7-10
  - data for an item type, 7-11
  - item type attributes, 7-10
  - runtime data for an item type, 7-11, B-6
  - workflow status information, 7-11
- Diagnostics, D-1
- Directory repository, 2-19
- Directory service views, 2-30
- Directory services, 2-19
  - checking the data model, 2-31, 7-7

- for Oracle Applications, 2-23
- for standalone Oracle Workflow, 2-20
- integrating with local workflow users, 2-21
- integrating with Oracle Database users, 2-22
- integrating with Oracle Internet Directory, 2-21
- synchronization, 2-40

DISABLED preference, 2-66

DLL location, 2-18

Duplicate User Test, D-1

## **E**

---

E-mail notifications, 1-3, 2-54

- and HTML attachments, 2-3
- modifying mail templates, 2-80
- requirements, 2-3
- templates for, 2-61

Engine thresholds, 2-53

Environment variables

- WF\_ACCESS\_LEVEL, 6-2, 6-6
- WF\_RESOURCES, 2-49

Errored activities

- retrying, 7-10

Event messages

- enqueueing, 7-7

Exception handling

- inbound queues, 2-153

Exporting the Oracle Workflow schema, E-10

External Java function activities, 2-140

## **F**

---

FNDWFBES\_CONTROL\_QUEUE\_CLEANUP, 2-156

FNDWFLIC, 2-154

FNDWFPR

- concurrent program, 7-3

Forced synchronous processes, B-1

Foreign/primary key references, 7-10

## **G**

---

Generic Service Component Framework, 2-54

Global preferences, 2-11, 2-15

Global Preferences page, 2-11

GSC Control Queue Test, D-3

GSM Setup Test, D-2

## **H**

---

Hardware requirements, 2-2

Home page, 4-1

- administrator, 4-3

HTML-formatted e-mail, 2-69

HTML-formatted e-mail with attachments, 2-67

## **I**

---

Icons, 2-140

IMAP server, 2-55

Importing the Oracle Workflow schema, E-10

Incremental synchronization

- of directory service information, 2-26

Internal names

- updating activity, 7-5
- updating activity attributes, 7-5
- updating item attributes, 7-6
- updating item types, 7-6
- updating lookup codes, 7-6
- updating lookup types, 7-6
- updating message attributes, 7-7
- updating messages, 7-6

Item type attributes

- performance, B-2

Item types

- persistence type, B-6
- System: Mailer, 2-80

## **J**

---

Java agent listeners, 2-151

Java Development Kit, 2-4

Java Function Activity Agent, 2-140

- starting, 2-141
- stopping, 2-145, 7-8

Java monitor tool, 5-2

JavaScript

- support in a Web browser, 2-3

JInitiator, 2-18

## **L**

---

Languages

- enabling, 2-46

LDAP, 2-41

LDAP APIs, 2-43

LDAP preferences, 2-13, 2-16

Licensing, 2-154

Listeners

- for inbound agents, 2-151
- running, 7-4

Loader program

- Workflow Definitions Loader, 6-7

Local system, 2-12, 2-17

Login Server, 2-42

## **M**

---

MAILATTH preference, 2-71

Mailer Component Parameter Test, D-6

Mailer Component Test, D-6

Mailer Diagnostic Test, D-7

MAILHTM2 preference, 2-69

MAILHTML preference, 2-67

MAILTEXT preference, 2-66

Message attributes

- for Orig. Workflow Canceled Mail message, 2-105
- for Orig. Workflow Closed Mail message, 2-113
- for Orig. Workflow Invalid Mail message, 2-109
- for Orig. Workflow Open FYI Mail message, 2-99
- for Orig. Workflow Open Mail (Direct) message, 2-91
- for Orig. Workflow Open Mail (More Information Request) message, 2-125
- for Orig. Workflow Open Mail (Templated) message, 2-86
- for Orig. Workflow Open Mail for Outlook Express message, 2-96
- for Workflow Canceled Mail message, 2-104
- for Workflow Closed Mail message, 2-112
- for Workflow Invalid Mail message, 2-106
- for Workflow Invalid Open Mail (More Information Request) message, 2-130
- for Workflow Open FYI Mail message, 2-98
- for Workflow Open Mail (Direct) message, 2-89
- for Workflow Open Mail (More Information Request for Outlook Express) message, 2-127
- for Workflow Open Mail (More Information Request) message, 2-122
- for Workflow Open Mail (Templated) message, 2-84
- for Workflow Open Mail for Outlook Express message, 2-94
- for Workflow Secure Mail Content message, 2-121
- for Workflow Signature Required Mail message, 2-118
- for Workflow Signature Warning Mail message, 2-119
- for Workflow Summary Mail (HTML) message, 2-115
- for Workflow Summary Mail message, 2-114
- for Workflow URL Attachment message, 2-103
- for Workflow View From UI message, 2-100, 2-102
- for Workflow Warning Mail message, 2-116
- performance, B-3
- Message templates
  - for e-mail notifications, 2-80
- MIME support, 2-65
- Mod\_osso, 2-42
- Monitor
  - Administrator, 5-10
  - testing access, 5-33
- Monitoring
  - work items, 1-3
  - Workflow Monitor, 5-2
- Move Messages from Exception to Normal Queue of Workflow Agent concurrent program, 2-80, 2-153
- Multilingual support, 7-4, 7-9

## N

---

- Navigation paths, A-1
- NLS support
  - in a Web session, 2-46
  - in e-mail notifications, 2-49
  - in Oracle Workflow Builder, 2-47
- Notification
  - status, 7-9
- Notification access keys, 2-73
- Notification IDs, 2-73
- Notification mailers
  - about, 2-54
  - diagnostic script, 7-8
  - handling errors, 2-77
  - inbound processing, 2-62
  - MIME support, 2-65
  - notification preference, 2-65
  - outbound processing, 2-60
  - response processing, 2-62
  - sending summary notifications, 2-59
  - setup, 2-55
- Notification Preference Validation Test, D-1
- Notification preferences, 2-14, 2-17, 2-65
- Notification reassign modes, 2-133
- Notification System, 2-54
- Notification templates
  - for e-mail notifications, 2-80
- Notification Web page, 1-3
- Notifications
  - administrator search, 4-6
  - via e-mail, 2-54

## O

---

- Oacle Internet Directory, 2-16
- Oracle Application Server
  - Workflow server requirements, 2-3
- Oracle Application Server Security Framework, 3-4, 3-4
- Oracle Application Server Single Sign-On, 2-42
- Oracle Applications Manager, 1-4
- Oracle DBA Studio, 2-146, 2-149
- Oracle Diagnostics, D-1
- Oracle HTTP Server, 2-42
  - identifying the Workflow Web agent, 2-12
  - Workflow server requirements, 2-3
- Oracle Identity Management infrastructure, 3-4
- Oracle Internet Directory, 2-13, 2-41
- Oracle Net Services, 2-2
- Oracle Portal, 5-37
- Oracle Real Application Clusters, E-10
- Oracle Workflow
  - implementation issues, 2-1
- Oracle Workflow Builder, 1-2
  - requirements, 2-2
- Oracle Workflow home page, 4-1
  - administrator, 4-3
- Oracle Workflow Manager, 1-4

- Orig. Workflow Canceled Mail message template, 2-105
- Orig. Workflow Closed Mail message template, 2-113
- Orig. Workflow Invalid Mail message template, 2-109
- Orig. Workflow Open Mail (Direct) message template, 2-90
- Orig. Workflow Open Mail (More Information Request) message template, 2-124
- Orig. Workflow Open Mail (Templated) message template, 2-85
- Orig. Workflow Open Mail for Outlook Express message template, 2-95
- Orig. Workflow Open Mail message template, 2-99

## **P**

---

- Partitioning
  - for directory service tables, 2-25
- Partitioning Workflow tables, 2-9, B-5
- Performance
  - concepts, B-1
  - deferred activities, B-5
  - item attributes, B-2
  - message attributes, B-3
  - partitioning Workflow tables, B-5
  - purging, B-6
  - subprocesses, B-3
  - synchronous and asynchronous workflows, B-1
- Persistence, B-6
- PL/SQL, 1-3
- PL/SQL agent listeners, 2-151
- Plain text e-mail, 2-66
- Plain text e-mail with an HTML attachment, 2-71
- Portlets
  - Error Workflows, 5-38
  - Workflows, 5-38
- Profile options, C-1
- Propagation
  - for outbound agents, 2-153
- Protection level, 6-3
  - reset, 7-9
- Protection level locking
  - Access protection, 6-1
- Purge
  - performance, B-6
  - runtime data, 7-3

## **Q**

---

- QUERY preference, 2-66
- Queue tables, 2-147
- Queues
  - setting up, 2-147

## **R**

---

- RAC, E-10
- Real Application Clusters, E-10
- Reassign modes, 2-133
- Reassign notifications
  - in Administrator Monitor, 5-14
- Reassigning notifications, 2-133
- Removing Oracle Workflow, E-10
- Requirements
  - hardware and software, 2-2
- Resend Failed Workflow Notifications concurrent program, 2-80
- Respond attributes, 2-83, 2-83, 2-83, 2-86, 2-86, 2-86, 2-88, 2-88, 2-88, 2-91, 2-91, 2-91, 2-93, 2-93, 2-94, 2-96, 2-96, 2-96, 2-107, 2-110, 2-122, 2-125, 2-130
- Response processing
  - by notification mailers, 2-62
- Role
  - administrator, 2-11, 2-15
- Role hierarchies, 2-29
- Role inheritance, 2-29
- Routing
  - notifications, 4-5
- Rule Function Validation Test, D-2
- Runtime data, B-5

## **S**

---

- Schema
  - exporting and importing, E-10
  - recreating, E-10
- Search
  - for notifications, 4-6
- Security
  - classes of users, 3-2
  - configuring Oracle Workflow security options, 3-5
  - for e-mail notifications, 2-73
  - Oracle Application Server Security Framework, 3-4, 3-4
  - Oracle Identity Management infrastructure, 3-4
  - overview, 3-1
  - resources protected, 3-3
- Self-Service Monitor
  - testing access, 5-33
- Service components
  - agent listeners, 2-151
  - notification mailers, 2-54
- Single sign-on, 2-40, 2-42
- SMTP server, 2-55
- Software requirements, 2-2
- SSL, 3-4
- Status Monitor
  - Administrator, 5-10
  - guest access, 5-26
  - standard access, 5-23
  - testing access, 5-33

- Status report
  - developer, 7-11
  - end user, 7-11
- Stuck processes, 2-50
- Subprocesses
  - performance, B-3
- SUMHTML preference, 2-66
- SUMMARY preference, 2-66
- Synchronization
  - with Oracle Internet Directory, 2-40, 2-43
- Synchronize WF LOCAL Tables concurrent program, 2-26
- Synchronize Workflow LOCAL Tables request set, 2-26
- Synchronizing user and role information, 2-25
- Synchronous processes, B-1
- System: Mailer item type, 2-80

## T

---

- TCP/IP drivers, 2-2
- Timed out processes, 2-50, B-5
- Transferring notifications, 2-133
- Translation, 2-46

## U

---

- URLs
  - for Find Processes Web page, 5-6
  - for Oracle Workflow home page, 4-1
  - for the Workflow Monitor, 5-6
- User preferences, 2-11
  - document management home, 2-14
  - language and territory, 2-13
  - notification preference, 2-14, 2-17

## V

---

- Vacation rules
  - for users, 4-5
- Version, 7-12
  - of Oracle Workflow, 2-6
- Version compatibility, 2-6

## W

---

- Web agent
  - for Oracle Workflow, 2-12
- Web home page, 4-1
  - administrator, 4-3
- Web notifications
  - requirements, 2-3
- WF: GUEST Access to Notification profile option, C-2
- WF: Mailer Cancellation Email profile option, 2-59, C-2
- WF: Notification Reassign Mode profile option, 2-133, C-2

- WF: Vacation Rules - Allow All profile option, 2-135, C-3
- WF: Workflow Mailer Framework Web Agent profile option, C-3
- WF\_ACCESS\_LEVEL, 6-2, 6-6
- WF\_ALL\_ROLES\_VL
  - view, 2-38
- WF\_ALL\_USER\_ROLE\_ASSIGNMENTS
  - view, 2-39
- WF\_ALL\_USER\_ROLES
  - view, 2-39
- WF\_CONTROL, 2-155
- WF\_CONTROL queue, 2-147
- WF\_DEFERRED queue, 2-147
- WF\_DEFERRED\_QUEUE\_M, 2-50
- WF\_DIRECTORY\_PARTITIONS, 2-25
- WF\_ENGINE.BACKGROUND, 2-51
- WF\_ERROR queue, 2-147
- WF\_IN queue, 2-147
- WF\_INBOUND\_QUEUE, 2-50
- WF\_JMS\_IN queue, 2-147
- WF\_JMS\_OUT queue, 2-147
- WF\_LANGUAGES view, 2-46
- WF\_LOCAL\_ROLES, 2-20
- WF\_LOCAL\_USER\_ROLES, 2-20
- WF\_NOTIFICATION\_IN queue, 2-147
- WF\_NOTIFICATION\_OUT queue, 2-147
- WF\_OUT queue, 2-147
- WF\_OUTBOUND\_QUEUE, 2-50
- WF\_RESOURCES
  - environment variable, 2-49
- WF\_ROLES
  - view, 2-35
- WF\_USER\_ROLE\_ASSIGNMENTS\_V
  - view, 2-37
- WF\_USER\_ROLES
  - view, 2-36
- WF\_USERS
  - view, 2-31
- Wfagtlst.sql, 7-4
- Wfbkg.sql, 7-4
- Wfbkgchk.sql, 7-5
- Wfchact.sql, 7-5
- Wfchacta.sql, 7-5
- Wfchita.sql, 7-6
- Wfchitt.sql, 7-6
- Wfchluc.sql, 7-6
- Wfchlut.sql, 7-6
- Wfchmsg.sql, 7-6
- Wfchmsga.sql, 7-7
- Wfdirchk.sql, 7-7
- wfdircsv.sql, 2-21
- wfdirouv.sql, 2-22
- wfevquec.sql, 2-150
- wfevqued.sql, 2-150
- Wfevtanq.sql, 7-7
- wfjvlsnr.bat, 2-141
- wfjvlsnr.csh, 2-141

- Wfjvstop.sql, 7-8
- WFLOAD, 6-10
- wfload, 6-8
- Wfmldrdbg.sql, 7-8
- wfnequ.sql, 2-79
- WFNLADD.sql, 7-4
- WFNLENA.sql, 7-9
- wfntffix.sql, 2-79
- wfntfqup.sql, 2-78
- Wfntfsh.sql, 7-9
- wfntfsnd.sql, 2-79
- Wfprot.sql, 7-9
- Wfqclean.sql, 7-9
- Wfrefchk.sql, 7-10
- Wfretry.sql, 7-10
- Wfrmall.sql, 7-10
- Wfrmita.sql, 7-10
- Wfrmitms.sql, 7-11
- Wfrmitt.sql, 7-11
- Wfrmtime.sql, 7-11, B-6
- Wfrun.sql, 7-11
- Wfstat.sql, 7-11
- Wfstatus.sql, 7-11
- Wfstdchk.sql, 7-12
- Wfupart.sql, 2-9
- Wfupartb.sql, 2-9
- Wfver.sql, 7-12
- Wfverchk.sql, 7-12
- Wfverupd.sql, 7-12
- wfxload, 6-14, 6-17
- wfxload.bat, 6-14, 6-17
- Workflow administrator, 2-11, 2-15
- Workflow Advanced Queue Rule Validation Test, D-5
- Workflow Agents/AQ Status Test, D-5
- Workflow Canceled Mail message template, 2-104
- Workflow Closed Mail message template, 2-112
- Workflow Configuration page, 2-15
- Workflow data model, 7-12
- Workflow definitions
  - loading, 1-3
  - transferring, 6-7
- Workflow Definitions Loader, 1-3, 6-7, 6-8
  - concurrent program, 6-10
- Workflow Designer
  - Oracle Workflow Builder, 1-2
- Workflow directory service views, 2-30
- Workflow Engine, 1-2
  - threshold cost, 2-53
- Workflow Invalid Mail message template, 2-106
- Workflow Invalid Open Mail (More Information Request) message template, 2-129
- Workflow LDAP APIs, 2-43

- Workflow Monitor, 5-2
  - Administration buttons, 5-5
  - Administrator, 5-10
  - Detail Tab window, 5-4
  - Process Diagram window, 5-3
  - Process title, 5-3
  - testing access, 5-33
- Workflow Notification Mailer, 2-54
- Workflow Objects Validity Test, D-6
- Workflow Open Mail (Direct) message template, 2-87
- Workflow Open Mail (More Information Request for Outlook Express) message template, 2-126
- Workflow Open Mail (More Information Request) message template, 2-121
- Workflow Open Mail (Templated) message template, 2-82
- Workflow Open Mail for Outlook Express message template, 2-92
- Workflow Open Mail message template, 2-97
- Workflow processes
  - creating and starting, 7-11
  - monitoring, 5-2
- Workflow queues
  - cleaning, 7-9
- Workflow roles, 2-19
- Workflow Secure Mail Content message template, 2-120
- Workflow Server
  - requirements, 2-2
- Workflow Signature Required Mail message template, 2-117
- Workflow Signature Warning Mail message template, 2-119
- Workflow Summary Mail (HTML) message template, 2-115
- Workflow Summary Mail message template, 2-114
- Workflow URL Attachment message template, 2-103
- Workflow users, 2-19
- Workflow View From UI message template, 2-100
- Workflow View FYI From UI message template, 2-101
- Workflow Warning Mail message template, 2-116
- Workflow Web pages
  - customizing logo, 2-139
- Workflow XML Loader, 6-11
- Worklist functions, 2-132

## **X**

- XML Parser Installation Test, D-6



