Oracle® Workflow

User's Guide

Release 12.2

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ORACLE®

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Oracle Workflow User's Guide, Release 12.2

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Preface

Intended Audience

Welcome to Release 12.2 of the *Oracle Workflow User's Guide.*

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

- The principles and customary practices of your business area.

- Computer desktop application usage and terminology.

- The Oracle E-Business Suite graphical user interface.

  To learn more about the Oracle E-Business Suite graphical user interface, read the *Oracle E-Business Suite User's Guide*.

If you have never used Oracle E-Business Suite, Oracle suggests you attend training classes available through Oracle University.

See Related Information Sources on page viii for more Oracle E-Business Suite product information.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

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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 Oracle Workflow Home Page

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

3 Viewing Notifications and Processing Responses

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

4 Monitoring Workflow Processes

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

A Oracle Workflow User Navigation Paths

This appendix lists the navigation paths to Oracle Workflow user Web pages in the seeded Oracle Workflow responsibilities for Oracle E-Business Suite.

B Oracle Workflow User Personalizations

This appendix lists features that you can add to Oracle Workflow user Web pages through Oracle Application Framework Personalization.

Glossary

Related Information Sources

This book is included in the Oracle E-Business Suite Documentation Library. If this guide refers you to other Oracle E-Business Suite documentation, use only the latest Release 12.2 versions of those guides.

Online Documentation

All Oracle E-Business Suite documentation is available online (HTML or PDF).

- **Online Help** - Online help patches (HTML) are available on My Oracle Support.

- **Oracle E-Business Suite Documentation Library** - This library, which is included in the Oracle E-Business Suite software distribution, provides PDF documentation as of the time of each release.

- **Oracle E-Business Suite Documentation Web Library** - This library, available on the Oracle Help Center (https://docs.oracle.com/cd/E26401_01/index.htm), provides the latest updates to Oracle E-Business Suite Release 12.2 documentation. Most documents are available in PDF and HTML formats.

- **Release Notes** - For information about changes in this release, including new features, known issues, and other details, see the release notes for the relevant

product, available on My Oracle Support.

- **Oracle Electronic Technical Reference Manual -** The Oracle Electronic Technical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for each Oracle E-Business Suite product. This information helps you convert data from your existing applications and integrate Oracle E-Business Suite data with non-Oracle applications, and write custom reports for Oracle E-Business Suite products. The Oracle eTRM is available as an application in Oracle E-Business Suite.

Related Guides

You should have the following related books on hand. Depending on the requirements of your particular installation, you may also need additional manuals or guides.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle E-Business Suite data.

Oracle Application Framework Developer's Guide

This guide contains the coding standards followed by Oracle E-Business Suite Development to create applications with Oracle Application Framework. This guide is available in PDF format on My Oracle Support and as online documentation in JDeveloper 10g with Oracle Application Extension.

Oracle Application Framework Personalization Guide

This guide covers the design-time and run-time aspects of personalizing applications built with Oracle Application Framework.

Oracle Diagnostics Framework User's Guide

This manual contains information on implementing and administering diagnostics tests for Oracle E-Business Suite using the Oracle Diagnostics Framework.

Oracle E-Business Suite Concepts

This book is intended for all those planning to deploy Oracle E-Business Suite Release 12.2, or contemplating significant changes to a configuration. After describing the Oracle E-Business Suite architecture and technology stack, it focuses on strategic topics, giving a broad outline of the actions needed to achieve a particular goal, plus any installation and configuration choices that are available.

Oracle E-Business Suite Developer's Guide

This guide contains the coding standards followed by Oracle E-Business Suite Development. It describes the Oracle Application Object Library components needed to implement the Oracle E-Business Suite user interface described in the *Oracle E-Business Suite User Interface Standards for Forms-Based Products*. It provides information to help you build your custom Oracle Forms Developer forms so that they integrate with Oracle E-Business Suite. In addition, this guide has information for customizations in features such as concurrent programs, flexfields, messages, and logging.

Oracle E-Business Suite Electronic Technical Reference Manual User's Guide

This guide describes how to set up and navigate Oracle E-Business Suite Electronic Technical Reference Manual (eTRM) user interface in Oracle E-Business Suite. It also explains how to browse and search the Oracle eTRM repository to locate desired FND and database metadata and objects, and how to view object details, reports, and diagrams.

Oracle E-Business Suite Installation Guide: Using Rapid Install

This book describes how to run Rapid Install to perform a fresh installation of Oracle E-Business Suite Release 12.2 or to replace selected technology stack executables in an existing instance.

Oracle E-Business Suite Integrated SOA Gateway Developer's Guide

This guide describes how integration developers can perform end-to-end service integration activities. These include orchestrating discrete web services into meaningful end-to-end business processes using business process execution language (BPEL), and deploying BPEL processes at runtime.

This guide also explains how to invoke web services using the Service Invocation Framework. This includes defining web service invocation metadata, invoking web services, and testing web service invocation.

Oracle E-Business Suite Integrated SOA Gateway Implementation Guide

This guide explains how integration administrators can manage and administer the web service activities for integration interfaces including native packaged integration interfaces, composite services (BPEL type), and custom integration interfaces. It also describes how to set up and implement Service Invocation Framework to invoke SOAP and REST services from Oracle E-Business Suite, and how to manage web service security, configure logs, and monitor both inbound service invocations using Service Monitor and outbound service invocations through Service Invocation Framework using Service Invocation Monitor.

Oracle E-Business Suite Integrated SOA Gateway User's Guide

This guide describes the high level service enablement process, explaining how users can browse and view the integration interface definitions and services residing in Oracle Integration Repository.

Oracle E-Business Suite Maintenance Guide

This guide explains how to patch an Oracle E-Business Suite system, describing the adop patching utility and providing guidelines and tips for performing typical patching operations. It also describes maintenance strategies and tools designed to help keep a system running smoothly.

Oracle E-Business Suite Mobile Apps Administrator's Guide, Release 12.1 and 12.2

This guide includes the latest mobile release with new underlying technologies, as well as the earlier mobile releases built with Oracle Mobile Application Framework (MAF). It explains how to set up an Oracle E-Business Suite instance to support connections

from Oracle E-Business Suite mobile apps. It also describes common administrative tasks for configuring Oracle E-Business Suite mobile apps. Logging and troubleshooting information is also included in this book.

Oracle E-Business Suite Mobile Apps Developer's Guide, Release 12.1 and 12.2

This guide includes information for the latest mobile release with new underlying technologies, as well as the earlier mobile releases built with Oracle Mobile Application Framework (MAF). For mobile releases built with MAF, this guide describes how to develop enterprise-distributed mobile apps by using mobile application archive (MAA) files and how to implement corporate branding. It also explains required tasks on implementing push notifications for supported mobile apps. In addition, it includes how to implement Oracle E-Business Suite REST services to develop custom mobile apps by using the Login component from Oracle E-Business Suite Mobile Foundation or using any mobile app development framework if desired.

Oracle E-Business Suite Security Guide

This guide contains information on a comprehensive range of security-related topics, including access control, user management, function security, data security, secure configuration, and auditing. It also describes how Oracle E-Business Suite can be integrated into a single sign-on environment.

Oracle E-Business Suite Setup Guide

This guide contains information on system configuration tasks that are carried out either after installation or whenever there is a significant change to the system. The activities described include defining concurrent programs and managers, enabling Oracle Applications Manager features, and setting up printers and online help.

Oracle E-Business Suite User's Guide

This guide explains how to navigate products, enter and query data, and run concurrent requests by means of the user interfaces (UI) of Oracle E-Business Suite. It includes basic information on setting preferences and customizing the UI. An introduction to Oracle Enterprise Command Centers is also included. Lastly, this guide describes accessibility features and keyboard shortcuts for Oracle E-Business Suite.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any product that includes workflow-enabled processes. It also describes how to manage workflow processes and business events using Oracle Applications Manager, how to monitor the progress of runtime workflow processes, and how to administer notifications sent to workflow users.

Oracle Workflow API Reference

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

Oracle Workflow Client Installation Guide

This guide describes how to install the Oracle Workflow Builder and Oracle XML

Gateway Message Designer client components for Oracle E-Business Suite.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle E-Business Suite-embedded workflow processes. It also describes how to configure message metadata for Oracle Mobile Approvals for Oracle E-Business Suite and how to define and customize business events and event subscriptions.

Oracle XML Gateway User's Guide

This guide describes Oracle XML Gateway functionality and each component of the Oracle XML Gateway architecture, including Message Designer, Oracle XML Gateway Setup, Execution Engine, Message Queues, and Oracle Transport Agent. It also explains how to use Collaboration History that records all business transactions and messages exchanged with trading partners.

The integrations with Oracle Workflow Business Event System, and the Business-to-Business transactions are also addressed in this guide.

Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the Oracle E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

Do Not Use Database Tools to Modify Oracle E-Business Suite Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle E-Business Suite 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 E-Business Suite data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, 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 E-Business Suite.

When you use Oracle E-Business Suite to modify your data, Oracle E-Business Suite

automatically checks that your changes are valid. Oracle E-Business Suite 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.

1

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 Users

Overview of Oracle Workflow for Users

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

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

Routing Information

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

Defining and Modifying Business Rules

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

Unlike workflow systems that simply route documents from one user to another with some approval steps, Oracle Workflow lets you model sophisticated business processes. You can define processes that loop, branch into parallel flows and then rendezvous, decompose into subflows, and more. Because Oracle Workflow can decide which path to take based on the result of a stored procedure, you can use the power of Java and of PL/SQL, the language of the Oracle Database, to express any business rule that affects a workflow process. See: Workflow Processes, page 1-4.

Delivering Electronic Notifications

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

Integrating Systems

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

Major Features and Definitions

Oracle Workflow Builder

Oracle Workflow Builder is a graphical tool that lets workflow developers create, view, or modify a business process with simple drag and drop operations. Using the Workflow Builder, you can create and modify all workflow objects, including activities, item types, and messages. See: Workflow Processes, page 1-4.

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 run in the same transaction as the code that raised the event. Subscription processing can include running custom code on the event information, sending event information to a workflow process, and sending event information to other queues or systems.

Workflow Definitions Loader

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

Complete Programmatic Extensibility

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

Electronic Notifications

Oracle Workflow lets you include users in your workflows to handle activities that cannot be automated, such as approvals for requisitions or sales orders. The Notification System sends notifications to and processes responses from users in a workflow. Electronic notifications are routed to a role, which can be an individual user or a group of users. Any user associated with that role can act on the notification.

Each notification includes a message that contains all the information a user needs to

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

Electronic Mail Integration

Electronic mail (email) users can receive notifications of outstanding work items and can respond to those notifications using their email application of choice. An email 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.

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 E-Business Suite.

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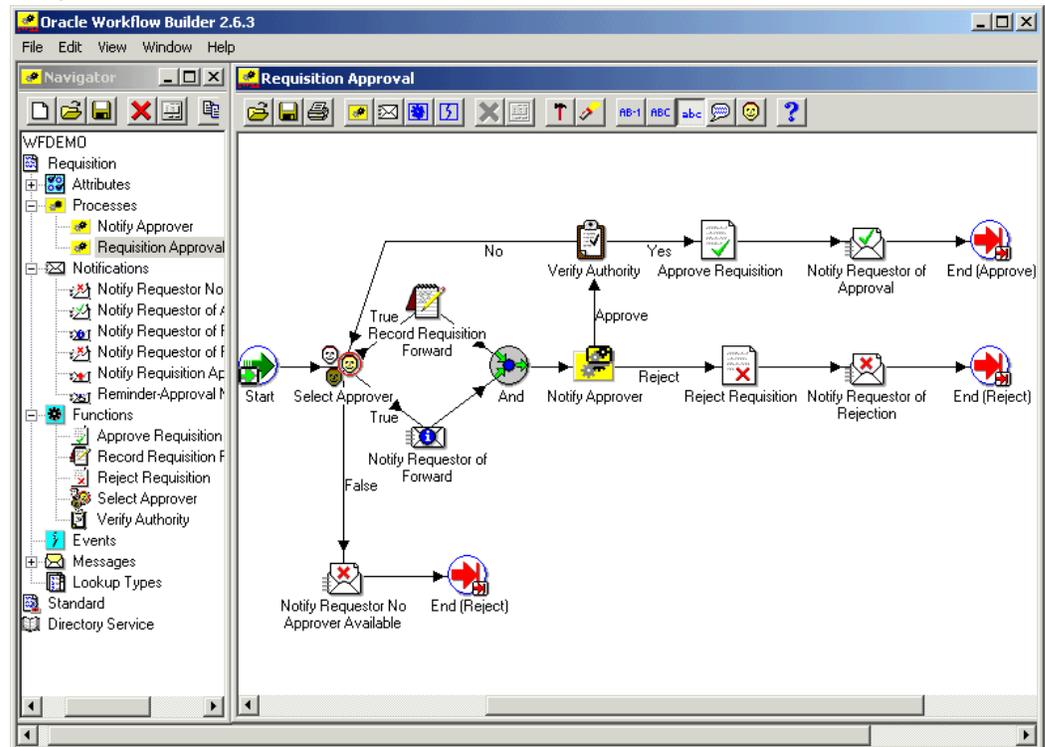
We refer to the whole drawing as a process or process diagram. The icons represent activities, and the arrows represent the transitions between the activities. In the above example, new items are created for the process when a user creates and submits a requisition in the appropriate application.

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.

2

Oracle Workflow Home Page

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

This chapter covers the following topics:

- Accessing the Oracle Workflow Self-Service Home Page

Accessing the Oracle Workflow Self-Service Home Page

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

> **Note:** Oracle Application 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 links to create your personalizations. For more information, see: Personalization, *Oracle Application Framework Personalization Guide*.
>
> For information about features available for Oracle Workflow user Web pages through personalization, see: Oracle Workflow User Personalizations, page B-1.

> **Note:** For information about setting user preferences in Oracle E-Business Suite, see: Preferences, *Oracle E-Business Suite User's Guide*.

To Access the Oracle Workflow Self-Service Home Page:

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

User Navigation Paths, page A-1.

To return to the home page from other Oracle Workflow pages, select Home in the top level menu.

2. To set your Oracle E-Business Suite general preferences, including language and notification preferences, select Settings and then Preferences. See: Set Preferences, *Oracle E-Business Suite User's Guide*.

3. The Notifications region of the home page lists your five highest priority notifications, ordered by priority and then by date. For each notification, the list displays the from role, workflow type, subject, sent date, and due date. Select the From, Type, Subject, Sent, or Due column heading to sort the list by that column.

   • To view and respond to a notification, select the notification subject link in the Subject column. See: To View the Details of a Notification, page 3-26.

   • To view a notification in the Notification Details pop-up window, if this window is enabled, position the cursor over the notification subject link. The pop-up window lets you view the notification details quickly without leaving the current page. To act on the notification, select the Go to Details Page link in the pop-up window. See: Enabling the Notification Details Pop-up Window, *Oracle Workflow Administrator's Guide*.

   • To view the complete list of all your notifications in the Advanced Worklist, select the Full List button. The Full List button displays in parentheses the number of open notifications in your worklist. See: To View Notifications from the Advanced Worklist, page 3-22.

   • To define vacation rules, select the Vacation Rules link. See: To View and Maintain Vacation Rules, page 3-38.

   • If your site is configured to grant proxy users worklist access with implicit Oracle Workflow responsibility access, then a Worklist Access tip link appears. To grant access to your worklist to another user, select this link. See: Granting Worklist Access with Implicit Oracle Workflow Responsibility Access, *Oracle E-Business Suite Security Guide*.

   • If you have been granted access to another user's worklist and your site is configured to grant proxy users worklist access with implicit Oracle Workflow responsibility access, then a Switch User button appears. To view another user's worklist, select this button and select the user whose worklist you want to view. See: Acting as a Worklist Proxy User with Implicit Oracle Workflow Responsibility Access, *Oracle E-Business Suite Security Guide*.

4. The Status at a Glance region displays the five most recent workflows that you own and that were started within the last two weeks. For each workflow, the list

displays the status, workflow type, workflow identifier, start date, and completion date. Select the Workflow Type, Workflow, or Started column heading to sort the list by that column.

- To view the error details for an errored workflow, select the error icon or the error link in the Status column. See: Viewing Error Information for a Workflow, page 4-9.

- To view the notification history for a workflow, select the workflow identifier link in the Workflow column. See: Viewing Notification History, page 4-3.

- To view the complete list of all your workflows in the Status Monitor, select the Full List button. See: Viewing Workflows in the Status Monitor, page 4-2.

5. To view notifications in the Notifications Worklist, select Notifications in the top level menu. See: To View Notifications from the Advanced Worklist, page 3-22.

6. To view the Workflow Monitor, select Status Monitor in the top level menu. See: Accessing the Self-Service Monitor, page 4-1.

3

Viewing Notifications and Processing Responses

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

This chapter covers the following topics:

- Overview of Notification Handling
- Reviewing Notifications via Electronic Mail
- Reviewing a Summary of Your Notifications via Electronic Mail
- Viewing Notifications from a Web Browser
- Vacation Rules
- Viewing Notifications from the Personal Worklist

Overview of Notification Handling

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

As a member of a role, you can view a notification using any one of three interfaces depending on your role's notification preference setting in the Oracle Workflow directory service. You can receive an email for each individual notification, receive a single email summarizing all your notifications, or query the Worklist pages for your notifications. If you choose to receive email, you can also choose the format in which you want to receive the email messages. See: Notification Preferences, *Oracle Workflow Administrator's Guide* and Preferences, *Oracle E-Business Suite User's Guide*.

> **Note:** Your administrator can disable individual emails for particular notifications. In this case, you must use the Worklist pages to access the details of those notifications. See: Setting Global User Preferences, *Oracle Workflow Administrator's Guide*.

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

Oracle Workflow sends your notifications in the language specified in your user preferences, if that language is set up in your installation. See: Setting Up Additional Languages, *Oracle Workflow Administrator's Guide*.

> **Note:** In Oracle E-Business Suite, you can select a session-level language in the login window, which overrides your user-level language preference for that session. However, Oracle Workflow still uses your user-level language preference to determine the language in which email notifications are sent. You can use the Preferences page to set your user-level language preference, which is also stored in the ICX: Language profile option. See: Preferences, *Oracle E-Business Suite User's Guide*.

In some cases, such as if you are away on vacation, you will not be able to view or respond to your notifications in a timely manner. Rather than create a bottleneck in a workflow process, you can take advantage of vacation rules, also known as routing rules or automatic notification processing rules, to direct Oracle Workflow to automatically manage the notifications for you.

Electronic Signatures

Notifications can require that your response be signed by a password-based or certificate-based electronic signature.

- Password-based signature - You must enter your Oracle E-Business Suite user name and password to sign your response.

  > **Note:** Oracle Workflow supports password-based signatures based on Oracle Application Object Library (FND) passwords. If your site has implemented single sign-on functionality and you need to enter password-based signatures, your system administrator must set the Applications SSO Login Types profile option to either Local or Both for you, and you must have a valid password defined in Oracle Application Object Library. Your single sign-on password can be different than your Oracle Application Object Library password. If

so, you must use your Oracle Application Object Library password to sign notifications. See: Implementing Password-based Signatures with Single Sign-On, *Oracle Workflow Administrator's Guide*.

- Certificate-based digital signature - You must sign your response with a valid X.509 certificate issued by a certificate authority.

    > **Note:** To sign notification responses with certificate-based digital signatures, you must access the notifications in the Oracle Workflow Web pages using a supported version of Microsoft Internet Explorer. See: *R12: Recommended Browsers for Oracle E-Business Suite*, My Oracle Support Knowledge Document 389422.1.

To set up for certificate-based digital signatures:

1. Obtain an X.509 certificate and private key from a certificate authority. The certificate and key should be provided in a PKCS 12 file with an extension of `.p12` or `.pfx`.

2. Obtain the certificate authority's root certificate and any intermediate certificates required for your type of certificate. Also, for each root and intermediate certificate, obtain a URL specifying the location from which the corresponding Certificate Revocation List (CRL) can be downloaded.

    If your system administrator has already obtained and installed the root certificate for your certificate authority and the intermediate certificates for your type of certificate, you can skip this step.

3. Load the file containing your personal certificate and key onto the file system of your client PC, and import the certificate into your browser. For detailed instructions, please refer to the online help for your browser. In some cases the certificate authority may automatically import the certificate into your browser when you obtain the certificate.

4. Use the certificate management functions in your browser or operating system to export your personal certficate in the DER encoded binary X.509 format. The certificate should be exported as a file with an extension of `.cer`.

5. Give your system administrator the exported file for your personal certificate, as well as the root certificate for your certificate authority and the intermediate certificates for your type of certificate, if necessary. The system administrator must load these certificates into Oracle E-Business Suite before you can use your personal certificate to sign Oracle Workflow notifications. See: Loading Certificates for Digital Signatures, *Oracle Workflow Administrator's Guide*.

Reviewing Notifications via Electronic Mail

You can have your workflow notifications delivered to you as email messages if your notification preference is set to 'Plain text mail with no attachments', 'Plain text mail with attachments', 'HTML mail with no attachments', or 'HTML mail with attachments', in the User Preferences web page and your workflow administrator sets up a notification mailer to run.

> **Note:** Your administrator can disable individual emails for particular notifications. In this case, you must use the Worklist pages to access the details of those notifications. See: Setting Global User Preferences, *Oracle Workflow Administrator's Guide*.

If your email reader can only support plain text messages with no attachments, set your notification preference to 'Plain text mail with no attachments'. You can also choose this preference if you want to save space in your email account by excluding the attachments from email notifications and accessing the attachment content only by logging in to Oracle E-Business Suite

If your email reader can only display plain text in the body of a message, but can also display attachments to the message, set your notification preference to 'Plain text mail with attachments'. Choose this preference if you want to receive the attachments in email for easy access.

If your email reader can interpret and display HTML-formatting in the body of a message, select 'HTML mail with no attachments' or 'HTML mail with attachments' as your notification preference. HTML mail can include images and provide direct links to supporting information sources that you may need to access to complete a notification. You can choose whether you want to access attachments only by logging in to Oracle E-Business Suite or receive the attachments in email.

> **Note:** If your site is configured to limit the size of workflow emails to accommodate your SMTP server's limits, then Oracle Workflow does not include any attachments that would exceed the maximum size, even if you have chosen a notification preference for receiving attachments in email. Instead, the email displays a note indicating that one or more attachments could not be included. In this case, you must access the notification through the Worklist pages to view the attachments.

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

Beginning in Release 12.2.7, Oracle Workflow email notifications always display date

and time values in your client time zone. Depending on how your instance is configured, the email notifications may also display a time zone indicator that specifies what your client time zone is.

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

Once you read an FYI message, you can delete it from your inbox. However, if the notification mailers for your organization are set up to keep FYI notifications open after sending them by email, you must also use the Worklist to manually close the notification, even if you have already deleted the notification message from your email inbox.

If you have multiple email addresses stored for your user name in Oracle E-Business Suite, then Oracle Workflow sends a copy of each email notification to each of your addresses. You can respond to the notification from any of these email messages. You only need to respond once. After you have responded, you can delete the relevant email messages from all your email inboxes.

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

Both templated and direct response email notifications are based on standard message templates defined in Oracle Workflow Builder. Both describe the syntax the reply should follow and list the information needed to confirm the notification. See: Modifying Your Message Templates, *Oracle Workflow Administrator's Guide*.

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

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

The format of the NID line is as follows:

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

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

> **Note:** If you set your notification preference to receive email notifications, but all the email addresses on record for you are invalid, then Oracle Workflow changes your notification preference to 'Disabled'. In this case, you must correct your email address or addresses in the directory service used by Oracle Workflow and then reset your notification preference before you can receive email notifications. While your notification preference is set to 'Disabled', you can still access your notifications through the Worklist Web pages.
>
> After you correct your email address and notification preference, your system administrator can also run the Resend Failed/Error Workflow Notifications concurrent program to retry open notifications that could not be sent to you previously. See: Handling Mailer Errors, *Oracle Workflow Administrator's Guide*.
>
> If you have multiple email addresses stored for your user name in Oracle E-Business Suite, and at least one of your email addresses is valid, then Oracle Workflow continues to send email notifications to that address, even if other addresses stored for you are invalid. Oracle Workflow will not send email notifications to the invalid address or addresses until those addresses are corrected in the directory service and your administrator restarts the notification mailer.

> **Note:** You can receive a copy of an email notification as a secondary (CC) or additional non-displayed (BCC) recipient. In this case, the format of the email is determined by the notification, language, and territory preferences of the primary recipient. If the notification has multiple primary recipients, you receive copies of all the emails sent to all the primary recipients. You receive only the original notification and do not receive copies of requests for more information or answers providing more information. Additionally, you may or may not be able to respond to the notification, depending on the security configuration of the notification and of Oracle Workflow at your site. See: Additional Email Recipient Attributes, *Oracle Workflow Developer's Guide*.

To Respond to a Plain Text Email Notification Using Templated Response:

1. Your plain text email notification includes information that is helpful for you to

respond to the notification. Depending on the notification, the information may appear as references to other sources or as attachments. Some attachments, depending on their content may only be viewable if you display your notification using the Notification web pages. See: Viewing Notifications from a Web Browser, page 3-20.

2. To respond to your notification, use the Reply command in your mail application to reply to the original email notification.

3. Include the response template from the original notification in your reply. In addition to the response prompts, the response template includes the special notification ID and access key that a notification mailer requires to identify the notification you are responding to. If your mail application includes an editable copy of the original message when it generates the reply message, you can use that copy to enter your response values. Otherwise, copy and paste from the original message to obtain a copy of the response template that you can edit.

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

> **Note:** When you are using the two double quotes to delimit your response, you can validly use a single quote character within your response value. For example, a response to a Comment prompt could be entered as follows:
>
> ```
>  Comment: "This proposal isn't acceptable."
> ```
>
> However, you cannot validly use another double quote character within your response value in the default format. If you want to use the double quote character (") within your response value, you can optionally enter your response in one of the following alternate formats. You can use different formats for different responses within the same response message.
>
> - You can enter a backslash (\) as an escape character before the double quote. For example, a response to a Comment prompt could be entered as follows.
>
> ```
>   Comment: "The \"Equipment\" proposal is approved."
> ```
>
> - You can delete the two double quotes and enclose your response between two single quotes (' ') instead to delimit the response value. For example:
>
> ```
>   Comment: 'The "Equipment" proposal is approved.'
> ```
>
> - You can delete the two double quotes and enclose your

response between a left bracket and a right bracket ([ ]) instead
to delimit the response value. For example:

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

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

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

6. If another user sent you this notification with a request for more information,
include the response template in your reply and insert the information you want to
provide between the quotes or other delimiting characters following the response
prompt. When you are satisfied with your response, use the Send command of the
mail application to send your reply.

> **Note:** Depending on the configuration of your Oracle Workflow
> installation, your notification may use either single quotes (' '),
> double quotes (" "), or brackets ([ ]) as delimiting characters
> following the response prompt.

> **Note:** If you send an invalid response to a request for more
> information, the Notification System sends you a message
> informing you that your response was not valid. If you respond to
> a request for more information that was already previously
> responded to, the Notification System sends you a message
> informing you that the request has already been answered.

7. If this notification requires a password-based signature or certificate-based digital
signature in your response, you cannot respond to the notification through email. In
this case the notification informs you that an electronic signature is required and
directs you to access the online version of the notification instead. Navigate to the
Notification Details web page to submit your response. See: To View the Details of a
Notification, page 3-26.

8. If this notification includes sensitive content that cannot be sent in email for security
reasons, the notification email message directs you to access the online version of

the notification instead. Navigate to the Notification Details page to view the content of the notification and submit your response. See: To View the Details of a Notification, page 3-26.

To Respond to a Plain Text Email Notification Using Direct Response:

1. Your plain text email notification includes information that is helpful for you to respond to the notification. Depending on the notification, the information may appear as references to other sources or as attachments. Some attachments, depending on their content may only be viewable if you display your notification using the Notification web pages. See: Viewing Notifications from a Web Browser, page 3-20.

2. To respond to your notification, use the Reply command in your mail application to reply to the original email notification.

3. Include the text of the original notification message in your reply. This text contains the special notification ID and access key that a notification mailer requires to identify the notification you are responding to.

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

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

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

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

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

   > **Note:** If you send an invalid response, the Notification System sends you an "invalid response" message. If you respond to a notification that has been canceled, you get a message informing you that the notification was canceled. Similarly, if you respond to a notification that was already previously responded to, you get a message informing you that the notification is closed.
   >
   > If you send an invalid response to a request for more information, the Notification System sends you a message informing you that your response was not valid. If you respond to a request for more

information that was already previously responded to, the Notification System sends you a message informing you that the request has already been answered.

6. If this notification requires a password-based signature or certificate-based digital signature in your response, you cannot respond to the notification through email. In this case the notification informs you that an electronic signature is required and directs you to access the online version of the notification instead. Navigate to the Notification Details web page to submit your response. See: To View the Details of a Notification, page 3-26.

7. If this notification includes sensitive content that cannot be sent in email for security reasons, the notification email message directs you to access the online version of the notification instead. Navigate to the Notification Details page to view the content of the notification and submit your response. See: To View the Details of a Notification, page 3-26.

Example: Direct Response Instructions

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

Response Instructions

Enter the Action on line 1. Do you approve? Value must be one of the following (default is "Reject"):

Approve

Reject

Enter the Review Comments on line 2. Value must be 2000 bytes or less.

Enter the Required Date on line 3. If there is no required date, leave this blank. Value must be a date in the form "DD-MON-YYYY".

Enter the Maximum Amount on line 4. This is the maximum approved amount. Value must be a number. Default is 1500.

Example

Valid Response A - Approve

Approve

Let me know if this item meets expectations.

01-JAN-2006

1000.00

Example

Valid Response B - Reject

Reject

Too expensive.

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

Example

Valid Response C - Reject

Reject

"This item is too expensive. Please find a replacement that is of lower cost, or else

include additional justification for why this item should be approved."

01-JAN-2006

1000.00

To Respond to an HTML Email Notification:

1. Your HTML-formatted email notification includes information that is helpful for you to respond to the notification. Depending on the notification and on your notification preference, the information may appear as links to other sources or as attachments. If your notification preference is 'HTML mail with no attachments', then you must access the notification in the Notification Details page to view any attachments for the notification. If your notification preference is 'HTML mail with attachments' but your SMTP server limits the size of workflow emails, then you may need to access the notification in the Notification Details page to view attachments that exceed the size limit.

HTML Email Notification
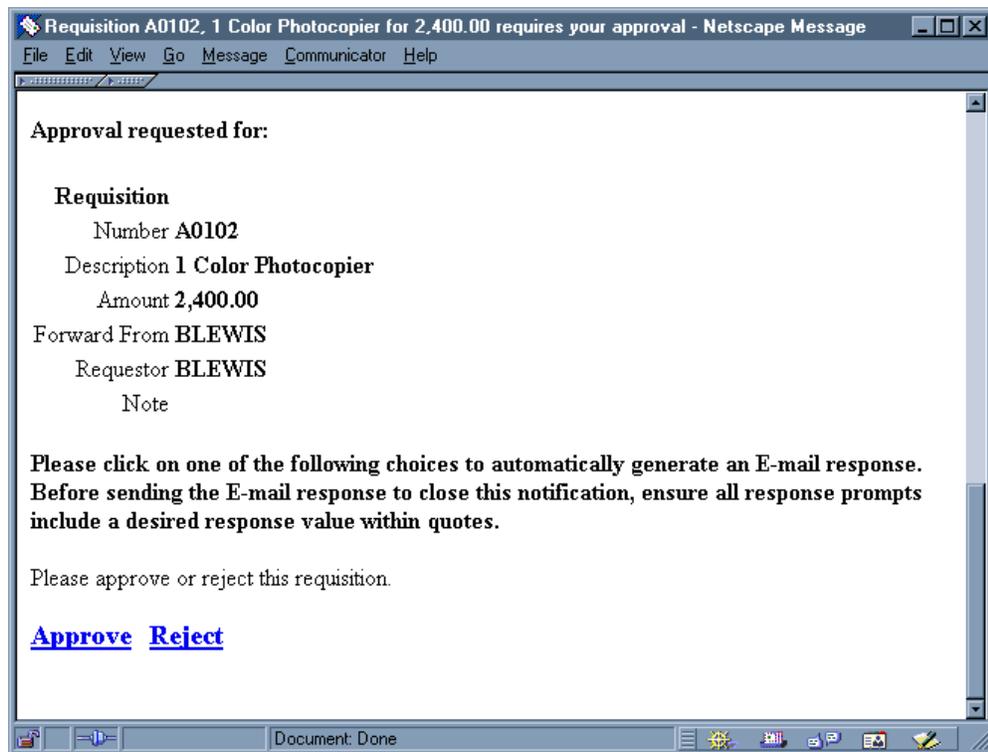
> **Important:** If your notification preference is 'HTML mail with attachments', an HTML-formatted email notification can include a standard attachment called Notification Detail Link that provides a direct link to your notification in the Notification Details web page.
>
> Note that your Web browser must support JavaScript and Frames to open this attachment. When you open the Notification Detail Link attachment, it automatically attempts to establish a web session with your web server. In doing so, it authenticates your

access, verifies that your notification is still open, and displays a message if the notification is already closed.

Depending on the configuration of your Oracle Workflow installation, if you are not already logged in, you may be prompted to log in before you can access the Notification Details page. Otherwise, if your configuration allows, you can access the Notification Details page for this notification directly, but you cannot access any other Oracle Workflow features unless you are logged in. See: Responses through the Notification Detail Link Attachment, *Oracle Workflow Administrator's Guide.*

You can respond directly to your notification from the Notification Details page, bypassing the need to process your response through a notification mailer. If you decide to respond from the Notification Details page, skip the remaining steps. See: To View the Details of a Notification, page 3-26.

The Notification Detail Link attachment is not included if your notification preference is 'HTML mail with no attachments'. Additionally, it is not included if your notification preference is 'HTML mail with attachments', but an administrator has designated you as an external user without access to Oracle E-Business Suite. If you are an external user, you must view and respond to the notification through email. See: Setting Up Notification Mailers, *Oracle Workflow Administrator's Guide*.

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

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

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

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

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

> **Important:** Do not include any HTML-formatting in the email response.

4. Depending on the notification, the auto-generated email response template may also prompt you for other information in addition to your selected response. Supply responses by editing the response value text between the delimiting characters following each response prompt.

> **Note:** Depending on the configuration of your Oracle Workflow installation, your response template may use either single quotes (' '), double quotes (" "), or brackets ([ ]) as delimiting characters following the response prompt. Using single quotes or brackets as delimiters accommodates email applications such as Microsoft Outlook Express that cannot process double quotes in the <A HREF="mailto:"> tag for the response link but can accept single quotes or brackets.

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

> If your response template uses two single quotes to delimit your response, you can validly use a double quote character within your response value. For example, a response to a Comment prompt could be entered as follows:

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

> However, you cannot validly use another single quote character within your response value in this format. If you want to use the single quote character (') as an apostrophe within your response value, you can optionally enter a backslash (\) as an escape

character before the apostrophe. For example, a response to a Comment prompt could be entered as follows.

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

If your response template uses double quotes or brackets to delimit your response, you can validly use a single quote within your response value. In this case, if you need to use a double quote or bracket within your response value, you can use the backslash (\) as an escape character before the double quote or bracket.

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

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

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

The Request Information link automatically generates a plain text email reply. The reply contains the correct Reply To: email address as well as a request template in the message body. The request template contains the required notification ID and access key that identify the notification you are responding to. It also contains a prompt for you to enter the user from whom you want to request information, along with a list of suggested users, and a prompt for you to enter the question you want to ask that user. The list of suggested users includes users who have participated in this workflow process or its parent process, and may also include additional users designated as participants for this message. See: #MORE_INFO_PARTICIPANTS Attribute, *Oracle Workflow Developer's Guide*.

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

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

7. If another user sent you this notification with a request for more information, click the response link and enter the information you want to provide between the quotes or other delimiting characters following the response prompt. When you are satisfied with your response, use the Send command of the mail application to send your reply.

> **Note:** Depending on the configuration of your Oracle Workflow installation, your notification may use either single quotes (' '), double quotes (" "), or brackets ([ ]) as delimiting characters following the response prompt.

> **Note:** If your workflow administrator has configured the notification mailer that sent this message to use the standard Workflow More Information Request (Outlook Express) message template, or if this notification is defined to use that template, then a link called "Click here to respond" appears in place of the email response link. The "Click here to respond" link provides access to your notification in the Notification Details Web page. If you are not already logged in, you may be prompted to log in before you can access the Notification Details page.

> **Note:** If you send an invalid response to a request for more information, the Notification System sends you a message informing you that your response was not valid. If you respond to a request for more information that was already previously responded to, the Notification System sends you a message informing you that the request has already been answered.

8. If this notification requires a password-based signature or certificate-based digital signature in your response, you cannot respond to the notification through email. In this case the notification informs you that an electronic signature is required and directs you to access the online version of the notification instead. Navigate to the Notification Details web page to submit your response. See: To View the Details of a Notification, page 3-26.

   Depending on the configuration of your Oracle Workflow installation, the notification may include a "Click here to respond" link that you can select to navigate to the Notification Details page. You must log in to Oracle E-Business Suite before you can access the Notification Details page. See: Confirming Responses with Electronic Signatures, *Oracle Workflow Administrator's Guide*.

9. If this notification includes sensitive content that cannot be sent in email for security reasons, the notification email message directs you to access the online version of the notification instead. Navigate to the Notification Details page to view the

content of the notification and submit your response. See: To View the Details of a Notification, page 3-26.

To Respond to a Plain Text Email Notification with an HTML Attachment:

1. Your plain text email notification with attachments includes information that is helpful for you to respond to the notification. Depending on the notification, the information may appear inline in the message body, as links to other reference sources or as attachments to the message. In addition, the notification always includes the following standard attachments:

    *   HTML Message Body-an HTML-formatted version of the notification message.

    *   Notification Detail Link-a direct link to your notification displayed in the Notification Details web page.

        > **Note:** The Notification Detail Link attachment is not included if your administrator has designated you as an external user without access to Oracle E-Business Suite. In this case you must view and respond to the notification through email. See: Setting Up Notification Mailers, *Oracle Workflow Administrator's Guide*.

    If your SMTP server limits the size of workflow emails, then you may need to access the notification in the Notification Details page to view attachments that exceed the size limit.

2. When you are done reviewing all the information for the notification, you can respond to the notification in one of three ways:

    *   Use your mail reader's Reply command to respond, following the instructions in the plain text message body. See: To Respond to a Plain Text Email Notification Using Templated Response, page 3-6 and To Respond to a Plain Text Email Notification Using Direct Response, page 3-9.

    *   Display the HTML Message Body attachment and respond by selecting one of the response links at the bottom of the HTML message body. See: To Respond to an HTML Email Notification, page 3-12.

    *   Choose the Notification Detail Link attachment to display the Notification Details web page. See: To View the Details of a Notification, page 3-26.

        > **Note:** Your Web browser must support JavaScript and Frames to open this attachment. When you open the Notification Detail Link attachment, it automatically attempts to establish a web session with your web server. In doing so, it authenticates your

access, verifies that your notification is still open, and displays a message if the notification is already closed.

Depending on the configuration of your Oracle Workflow installation, if you are not already logged in, you may be prompted to log in before you can access the Notification Details page. Otherwise, if your configuration allows, you can access the Notification Details page for this notification directly, but you cannot access any other Oracle Workflow features unless you are logged in. See: Responses through the Notification Detail Link Attachment, *Oracle Workflow Administrator's Guide.*

3. If this notification requires a password-based signature or certificate-based digital signature in your response, you cannot respond to the notification through email. In this case the notification informs you that an electronic signature is required and directs you to access the online version of the notification instead. Navigate to the Notification Details web page to submit your response. See: To View the Details of a Notification, page 3-26.

Depending on the configuration of your Oracle Workflow installation, the HTML Message Body attachment may include a "Click here to respond" link that you can select to navigate to the Notification Details page. You must log in to Oracle E-Business Suite before you can access the Notification Details page. See: Confirming Responses with Electronic Signatures, *Oracle Workflow Administrator's Guide*.

4. If this notification includes sensitive content that cannot be sent in email for security reasons, the notification email message directs you to access the online version of the notification instead. Navigate to the Notification Details page to view the content of the notification and submit your response. See: To View the Details of a Notification, page 3-26.

To Reassign a Notification to Another User:

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

Important: When you forward a notification to another user via email, you are simply asking that user to respond to the notification on your behalf. Note that you still maintain ownership of the notification. If you want to transfer the notification and ownership of the notification to another user, you can only do so from the Worklist Web pages. See: Viewing Notifications from a Web Browser, page 3-20.

Related Topics

Setting Up Notification Mailers, *Oracle Workflow Administrator's Guide*

Plain Text Email with No Attachments, *Oracle Workflow Administrator's Guide*

HTML-Formatted Email with No Attachments, *Oracle Workflow Administrator's Guide*

HTML-Formatted Email with Attachments, *Oracle Workflow Administrator's Guide*

Plain Text Email with Attachments, *Oracle Workflow Administrator's Guide*

Reviewing a Summary of Your Notifications via Electronic Mail

You can have a summary of your workflow notifications delivered to you as a single email message if your notification preference is set to 'Plain text summary mail' or 'HTML summary mail' in the User Preferences web page. You can receive a plain text email notification summary using any email reader. To receive an HTML email notification summary, you must be using an email reader that can interpret and display HTML formatting in the body of a message. Your workflow administrator determines how frequently summary notifications are sent when setting up a notification mailer. See: Setting Up Notification Mailers, *Oracle Workflow Administrator's Guide.*

The plain text and HTML-formatted versions of the email notification summary are based on the Workflow Summary Mail (HTML) template defined in the System: Mailer item type. The standard summary identifies the priority, from role, workflow type, subject, sent date, and due date of each notification. To view the details of a notification or respond to or close the notification, you should use the Worklist Web pages. In the HTML-formatted version of the summary, you can select a subject link to navigate directly to the Notification Details page for that notification. The HTML-formatted summary also includes a link to the Worklist page, from which you can access all your notifications.

> **Note:** Depending on the configuration of your Oracle Workflow installation, if you are not already logged in, you may be prompted to log in before you can access the Worklist or Notification Details pages. Otherwise, if your configuration allows, you can access the Notification Details page for a notification directly, but you cannot access any other Oracle Workflow features unless you are logged in. See: Responses through the Notification Detail Link Attachment, *Oracle Workflow Administrator's Guide.*

Related Topics

Viewing Notifications from a Web Browser, page 3-20

Workflow Summary Mail Message, *Oracle Workflow Administrator's Guide*

Workflow Summary Mail (HTML) Message, *Oracle Workflow Administrator's Guide*

Viewing Notifications from a Web Browser

The Worklist pages let you view and respond to your notifications using a Web browser. The Advanced Worklist provides an overview of your notifications, from which you can drill down to view an individual notification in the Notification Details page. You can also reassign notifications to another user, request more information about a notification from another user, respond to requests for information, and define vacation rules to handle notifications automatically in your absence.

Oracle Workflow also provides the Personal Worklist, which includes additional options to specify what notifications to display in your Worklist and what information to display for those notifications. Before you can use the Personal Worklist, your system administrator must give you access to it.

Additionally, Oracle Workflow provides the Notification Search page, which lets you enter search criteria to locate particular notifications. This page is included in Oracle Workflow administrator responsibilities by default. Before you can use the Notification Search page from other responsibilities, your system administrator must give you access to it. See: Adding Worklist Functions to User Responsibilities, *Oracle Workflow Administrator's Guide* and Searching for Users' Notifications, *Oracle Workflow Administrator's Guide*.

From Role

Some Worklist pages include a From column that shows the role from which the notification was sent.

- If this notification was reassigned through the Worklist web pages, the From column shows the user who reassigned the notification to the current recipient.

- If this notification is a request for more information, the From column shows the user who sent the request.

- If this notification is a response providing more information, the From column shows the user who sent the response.

- Additionally, the From role for a notification may be set by special logic in the workflow process. See: #FROM_ROLE Attribute, *Oracle Workflow Developer's Guide*.

Worklist Access

The Oracle E-Business Suite proxy user feature also lets you grant access to your worklist to another user. That user can then act as your proxy to handle the notifications in your list on your behalf. You can either grant a user access for a specific period or allow the user's access to continue indefinitely. You can also choose whether to grant

that user access to all your notifications, or only to notifications belonging to selected item types. See: Managing Proxy Users, *Oracle E-Business Suite Security Guide*.

The proxy user worklist access feature lets you allow another user to handle your notifications without necessarily giving that user access to any other privileges or responsibilities that you have in Oracle E-Business Suite. However, note that a user who has access to your worklist can view all the details of your notifications and take most actions that you can take on the notifications. Ensure that you take all necessary security considerations into account when you choose to grant worklist access to another user.

If another user has granted you access to his or her worklist and you switch users to access Oracle E-Business Suite as that user's proxy, then the Advanced Worklist displays that user's notifications instead of your own. When viewing another user's worklist, you can perform the following actions:

- View the details of the user's notifications.

- Respond to notifications that require a response.

- Close notifications that do not require a response.

- Reassign notifications to a different user.

    > **Note:** Your own assigned notification reassign mode still applies
    > when you are viewing another user's worklist. For example, if your
    > notification reassign mode is Delegate, then you can only delegate
    > notifications, even if you are viewing the worklist of a user who has
    > access to transfer notifications. See: Setting the WF: Notification
    > Reassign Mode Profile Option, *Oracle Workflow Administrator's
    > Guide*.

- Request more information about a notification from a different user.

- Respond to a request for more information.

However, if the user whose worklist you are accessing has a notification marked as being sent from you, you can only view that notification and cannot take any action on it. For example, you cannot respond to a notification that you reassigned to the other user, nor to a notification marked as being sent from you by the special #FROM_ROLE message attribute, such as an expense report that is marked as having been submitted by you. If you have workflow administrator privileges, however, those privileges override this restriction so that you can respond to all notifications, even notifications from you. See: #FROM_ROLE Attribute, *Oracle Workflow Developer's Guide* and Setting Global User Preferences, *Oracle Workflow Administrator's Guide*.

If a user granted you access only to selected item types, then when you view that user's worklist, the page displays only notifications that belong to those item types.

To access resources linked from a notification such as attachments, you must also have

the associated Oracle Workflow responsibility access. You will be able to view linked resources if your site is configured to grant proxy users worklist access with implicit Oracle Workflow responsibility access, or if the delegating user explicitly granted you the associated Oracle Workflow responsibility access. See: Managing Proxy Users, *Oracle E-Business Suite Security Guide*.

You cannot define vacation rules for the user whose worklist you are viewing.

> **Note:** To respond to a notification that requires a digital signature, you must be logged in as the intended recipient. You cannot respond to a notification that requires a digital signature when you are accessing another user's worklist, because in this case the user responding will not match the intended recipient, so authorization will fail.

To View Notifications from the Advanced Worklist:

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

   > **Note:** You can also access the Worklist Web pages through the Notification Detail links within certain email notifications. If you navigate from a link in an email notification to the Notification Details page, and next navigate from the Notification Details page to the Worklist, then to enhance performance, the Worklist page initially shows only the table of notifications, without the Select column, action buttons, or table navigation controls. You can still navigate through other features such as the Subject links to the Notification Details page for your notifications. If you access the Worklist for a second time or more in the same session, then the Worklist page displays the full control features for the table of notifications, including the Select column, action buttons, and table navigation controls.

2. To specify which notifications to display in the Worklist, select the type of notifications you want from the View pull-down menu and select Go. You can choose to view:

   • Open Notifications

   • FYI Notifications (For Your Information notifications that do not require a response)

   • To Do Notifications

- All Notifications

- Notifications From Me

3. The Advanced Worklist shows the following information for each notification:

    - From-the role from which the notification was sent. This column is displayed when you view notifications sent to you.

    - To-the role to which the notification was sent. This column is displayed when you view notifications sent from you.

    - Type-display name of the item type to which the workflow process that sent the notification belongs.

    - Subject-a description of the notification.

    - Sent-date when the notification was delivered.

        > **Note:** If another user reassigned a notification to you, then the sent date shows the date of the reassignment - that is, the date when the notification was sent to you - rather than the date when the notification was first sent to the original recipient.
        >
        > If another user sent you a request for more information about a notification, then the sent date of the request notification shows the date that the other user made the request to you, rather than the date when the original notification was sent.

    - Due-date by which the notification should be completed.

    - Status-open, closed, or canceled status of the notification. This column is displayed when you view all notifications.

    - End Date-date when the notification was closed or canceled. This column is displayed when you view all notifications.

    Select a column heading to sort the list by that column. By default, the list is sorted by sent date from most recent to oldest, and then by subject in alphabetical order.

4. You can navigate to the full details of any notification and act on the notification by clicking on the notification's Subject link or by selecting the notification and then choosing Open. See: To View the Details of a Notification, page 3-26.

5. To view a notification in the Notification Details pop-up window, if this window is enabled, position the cursor over the notification subject link. The pop-up window lets you view the notification details quickly without leaving the current page. To

act on the notification, select the Go to Details Page link in the pop-up window. See: Enabling the Notification Details Pop-up Window, *Oracle Workflow Administrator's Guide*.

6. To collectively reassign a group of notifications, select the notifications you want and select the Reassign button, the Delegate button, or the Transfer button.

   • The Reassign button appears if you have access to reassign notifications to another user either by delegating the notifications or by transferring complete ownership of the notifications.

   • The Delegate button appears if you only have access to delegate the notifications.

   • The Transfer button appears if you only have access to transfer ownership of the notifications.

   See: To Reassign a Notification to Another User, page 3-30 and Setting the WF: Notification Reassign Mode Profile Option, *Oracle Workflow Administrator's Guide*.

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

7. If your workflow administrator has enabled the Respond button on this page, you can respond to a group of notifications collectively. To do so, select the notifications you want and select the Respond button. The notifications must all belong to the same workflow type and message definition so that the response values you provide will match all the notifications in the group.

   > **Note:** You can only use the Respond button to respond to notifications that are open, require a response, and do not contain a request from another user for more information about another notification. To help determine which notifications you can respond to, use the View pull-down menu to display your open notifications or your To Do notifications. To respond to notifications that contain a request for more information, you must

access the notifications individually through the Notification Details page.

See: To Respond to a Group of Notifications, page 3-33 and Setting the WF: Enable Bulk Notification Response Profile Option, *Oracle Workflow Administrator's Guide*.

> **Note:** If you select only one notification before choosing the Respond button, Oracle Workflow displays the Notification Details page for that notification rather than the Respond to Notifications as Group page. See: To View the Details of a Notification, page 3-26.

8. To collectively close a group of FYI notifications, select the notifications you want and select the Close button. In the confirmation page, choose Apply.

> **Note:** You can only use the Close button to close notifications that are open and do not require a response. To help determine which notifications you can close, use the View pull-down menu to display your open notifications or your FYI notifications.

9. To define vacation rules, select the Vacation Rules link. See: To View and Maintain Vacation Rules, page 3-38.

10. If your site is configured to grant proxy users worklist access with implicit Oracle Workflow responsibility access, then a Worklist Access tip link appears. To grant access to your worklist to another user, select this link. See: Granting Worklist Access with Implicit Oracle Workflow Responsibility Access., *Oracle E-Business Suite Security Guide*.

11. If you have been granted access to another user's worklist and your site is configured to grant proxy users worklist access with implicit Oracle Workflow responsibility access, then a Switch User button appears. To view another user's worklist, select this button and select the user whose worklist you want to view. See: Acting as a Worklist Proxy User with Implicit Oracle Workflow Responsibility Access, *Oracle E-Business Suite Security Guide*.

> **Note:** When you view a worklist other than your own, the Advanced Worklist page displays the name of the user to whom the worklist belongs. You can view and act on that user's notifications. However, you cannot act on notifications marked as being sent from you, and you cannot define vacation rules for that user or grant access to that user's worklist to anyone else. If the

other user granted you access only to selected item types, then when you view that user's worklist, the page displays only notifications that belong to those item types.

To View the Details of a Notification:

1. Navigate to the Notification Details page.

   If you are viewing a notification from another user's worklist, the Notification Details page displays the name of that user.

   The Notification Details page also displays status information in the following cases:

   • Another user delegated or transferred this notification to you.

   • Another user sent you this notification with a request for more information, or transferred a request for more information to you.

   • Another user provided more information in response to a request from you.

   The status information shows the name of the other user and any comment provided by that user.

2. The notification header shows general identifying information and may also include additional header attributes that display key information about the notification. See: Header Attributes, *Oracle Workflow Developer's Guide*.

   In Oracle E-Business Suite, you can link attachments to a data record. If a notification includes such Oracle E-Business Suite attachments, the notification header displays an Attachment(s) heading with links to the attachments. Select a link to view the attached data. See: Using Attachments, *Oracle E-Business Suite User's Guide*.

   A notification may also include a message body, a related applications section, and a response section.

3. The message body displays the information of which you are being notified. The message body may include inline images as well as embedded links to additional information sources pertinent to the notification. A reference URL link connects to a specified URL, either in the same web browser window or in a new window, depending on the notification.

4. The related applications section may include attachment icons. These icons link to additional information sources for the notification. There are three types of attachment links:

   • A reference URL link that opens another Web browser window and connects to

a specified URL.

- A PL/SQL, PL/SQL CLOB, or PL/SQL BLOB document link that displays the contents of a document generated from a PL/SQL function. Such documents can contain text, HTML, images, or application files such as PDF or RTF documents.

- An Oracle E-Business Suite form link that drills down to an Oracle E-Business Suite form or Web page referenced by the underlying message attribute. Depending on how the message attribute is defined, the form or page can automatically display appropriate context information.

> **Note:** You must use a responsibility with the appropriate security to open a linked form or Oracle Application Framework page. If the form link or URL link is defined to use a particular responsibility, you must have that responsibility assigned to you to open the form or page. Otherwise, Oracle E-Business Suite displays a list from which you can select the responsibility you want to use.
>
> You cannot update information in a form that is attached for reference only.

5. If you want to view your next notification in the Notification Details page after responding to this notification, select the Display Next Notification After My Response checkbox. Otherwise, Oracle Workflow displays the Worklist after you respond to a notification.

6. Use the Response section to act on the notification.

- If a notification requires a response, but none of the responses affect the result of the notification activity, the response prompts all appear as fields or pull-down menus. If the notification includes supplemental instructions for a response prompt, those instructions appear as a tooltip when you position the cursor over the response field or pull-down menu. After you finish entering your response values, submit your response by choosing the Submit button. After you submit your response, the status of the notification changes to Closed.

- If a notification requires a response, and one of the responses becomes the result of the notification activity, then that determining response will appear last. All other response prompts, if any, appear as fields or pull-down menus before that prompt. If the notification includes supplemental instructions for a response prompt, those instructions appear as a tooltip when you position the cursor over the response field or pull-down menu.

  - If there are four or fewer possible result values for the final response

prompt, those values appear as a set of buttons. After you finish entering your response values for any other response prompts, choose the button for the result value you want. When you choose one of these buttons, you also submit your response to the notification.

- If there are more than four result values to choose from for the final response prompt, those values appear in a pull-down menu with a Submit button. After you finish entering your response values for any other response prompts, select the result value you want from the pull-down menu and submit your response by choosing the Submit button.

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

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

- If a notification does not require a response, the Response section indicates that. Choose the Close button in the Response section to close the notification so that it does not appear in your worklist the next time you view your open notifications.

- If you revisit a notification that is closed, the Notification Details page shows the result of the notification activity, if any, and the Response section displays any additional response values that were submitted. Also, the notification header shows the user who responded to or closed the notification.

  If a notification for one user was closed by another user through access to the first user's worklist, the name of the second user, who actually took the action, is displayed as the responder.

- If you want another user to respond to the notification instead of you, choose the Reassign button, the Delegate button, or the Transfer button in the Response section.

  - The Reassign button appears if you have access to reassign a notification to another user either by delegating the notification or by transferring complete ownership of the notification.

  - The Delegate button appears if you only have access to delegate the notification.

  - The Transfer button appears if you only have access to transfer ownership of the notification.

  See: To Reassign a Notification to Another User, page 3-30 and Setting the WF:

Notification Reassign Mode Profile Option, *Oracle Workflow Administrator's Guide*.

> **Important:** Your workflow may include special logic to restrict reassignment of notifications. If so, the Reassign button, Delegate button, or Transfer button may not be displayed in the Response section, and you should not reassign the notification.
>
> However, users with workflow administrator privileges can reassign even restricted notifications. For users with workflow administrator privileges, the Response section always displays the Reassign button, Delegate button, or Transfer button, regardless of any special logic.
>
> See: #HIDE_REASSIGN Attribute, *Oracle Workflow Developer's Guide*.

- To request more information about this notification from another user or role, choose the Request Information button in the Response section. See: To Request More Information From Another User, page 3-35.

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

- If another user sent you this notification with a request for more information, the Response section displays the question sent by that user. To answer, select the Answer Request for More Information option, enter the information you want to provide in the Comments field, and choose the Submit button to submit your response.

  If you want another user to answer instead of you, select the Transfer Request for More Information option. In the Assignee fields, select the type of user or role to which you want to reassign the request. Then select the user or role you want within that type. Enter any additional comments, and choose Submit.

  > **Note:** The assignee types correspond to the originating system partitions in the Oracle Workflow directory service. See: Setting Up a Directory Service for Oracle Workflow, *Oracle Workflow Administrator's Guide*.
  >
  > If an administrator has restricted the users to whom you can

reassign the notification, then only the values to which you have access appear in the list. See: #WF_REASSIGN_LOV Attribute, *Oracle Workflow Developer's Guide* and Configuring the Oracle Workflow User List of Values, *Oracle Workflow Administrator's Guide*.

7. If this notification requires a password-based electronic signature, a confirmation page appears after you submit your response. This page displays notification header information and the response values that you entered to let you review the response you are signing. If the notification requires the signed response to include the message body, then the confirmation page also displays the message body for you to review. To affix your electronic signature to your response, enter your Oracle E-Business Suite user name and password and select the Submit button. This electronic signature is analogous to your written signature. See: #WF_SIG_POLICY Attribute, *Oracle Workflow Developer's Guide*.

> **Note:** If your site has implemented single sign-on functionality and your single sign-on password is different than your Oracle Application Object Library password, you must use your Oracle Application Object Library password to sign notifications. See: Electronic Signatures, page 3-2.

8. If this notification requires a certificate-based digital signature, a confirmation page appears after you submit your response. This page displays notification header information and the response values that you entered to let you review the response you are signing. If the notification requires the signed response to include the message body, then the confirmation page also displays the message body for you to review. Choose the Sign button and use your Web browser to enter your X.509 certificate as your signature. For detailed instructions, please refer to the online help for your Web browser. If you have multiple certificates installed, ensure that you enter a certificate that is assigned to the Oracle E-Business Suite user name with which you logged in. See: Electronic Signatures, page 3-2 and #WF_SIG_POLICY Attribute, *Oracle Workflow Developer's Guide*.

To Reassign a Notification to Another User:

1. Navigate to the Reassign Notifications page by one of the following methods.

   - In the Advanced Worklist, Personal Worklist, or self-service home page, select one or more notifications and choose the Reassign button, the Delegate button, or the Transfer button.

   - In the Notification Details page for a single notification, choose the Reassign

button, the Delegate button, or the Transfer button in the Response section of the notification.

- Choose to reassign a notification from the Status Monitor.

     Important: Your workflow may include special logic to restrict reassignment of notifications. If so, the Reassign button, Delegate button, or Transfer button may not be displayed in the Response section of the Notification Details page, and you should not reassign the notification. Also, if any of the notifications that you selected in the Advanced Worklist, Personal Worklist, or self-service home page are restricted in this way, Oracle Workflow displays an error message when you select the Reassign, Delegate, or Transfer button. In this case you should deselect the restricted notifications before performing the reassignment.

     However, users with workflow administrator privileges can reassign even restricted notifications. For users with workflow administrator privileges, the Response section always displays the Reassign button, Delegate button, or Transfer button, regardless of any special logic.

     See: #HIDE_REASSIGN Attribute, *Oracle Workflow Developer's Guide*
     .

2. If you are reassigning more than one notification, you can choose a subject link in the list of selected notifications to review the details of an individual notification.

3. If you chose to reassign a notification from the Status Monitor, then the Reassign page displays additional status details about the notification activity. To send email to the recipient of a notification, select the user link in the Notification Recipient field in the status details.

     Note: If more information has been requested for a notification, then the Notification Recipient field shows the user to whom the request for more information was sent, while the Original Recipient field shows the user to whom the original notification was sent. Select the user link in either field to send email to that user.

4. In the Assignee fields, select the type of user or role to which you want to reassign the notification. Then select the user or role you want within that type.

     Note: The assignee types correspond to the originating system partitions in the Oracle Workflow directory service. See: Setting Up

a Directory Service for Oracle Workflow, *Oracle Workflow Administrator's Guide*.

If an administrator has restricted the users to whom you can reassign the notification, then only the values to which you have access appear in the list. See: #WF_REASSIGN_LOV Attribute, *Oracle Workflow Developer's Guide* and Configuring the Oracle Workflow User List of Values, *Oracle Workflow Administrator's Guide*.

> **Note:** If an administrator has disabled reassignment of notifications to the process owner who initiated the workflow or the from role for the notification, then you cannot select those users. See: From Role, page 3-20 and Setting the WF: Disable Reassign to Submitter Profile Option, *Oracle Workflow Administrator's Guide*.

5. If you have access either to delegate or transfer notifications, select the option you want to specify how you want to reassign the notification.

   - "Delegate your response" - Select this option if you want to give the new user authority to respond to the notification on your behalf, but you want to retain ownership of the notification yourself. For example, a manager might delegate all vacation scheduling approvals to an assistant.

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

     > **Note:** If you only have access to delegate notifications, Oracle Workflow automatically uses the delegate option when you reassign notifications. Similarly, if you only have access to transfer notifications, Oracle Workflow automatically uses the transfer option when you reassign notifications.
     >
     > See: Setting the WF: Notification Reassign Mode Profile Option, *Oracle Workflow Administrator's Guide*.

6. Enter any comments you want to send with the notification to the new user. If you are reassigning more than one notification, your comments will be included with each notification.

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

To Respond to a Group of Notifications:

1. Navigate to the Respond to Notifications as Group page.

2. Review the notifications you selected to respond to. To view the full details of a notification and act on the notification individually, click the subject link for the notification.

3. Submit your response to the notifications.

   - If the notifications require a response, but none of the response values are defined as the final result of the notifications, the response prompts all appear as fields or pull-down menus. If the notifications include supplemental instructions for a response prompt, those instructions appear as a tooltip when you position the cursor over the response field or pull-down menu. After you finish entering your response values, submit your response by choosing the Go button.

   - If the notifications require a response, and one of the responses becomes the final result of the notifications, then that determining response appears last. All other response prompts, if any, appear as fields or pull-down menus before that prompt. If the notifications include supplemental instructions for a response prompt, those instructions appear as a tooltip when you position the cursor over the response field or pull-down menu.

     - If there are four or fewer possible result values for the final response prompt, those values appear as a set of buttons. After you finish entering your response values for any other response prompts, submit your response by choosing the button for the result value you want.

     - If there are more than four result values to choose from for the final response prompt, those values appear in a pull-down menu with a Go button. After you finish entering your response values for any other response prompts, select the result value you want from the pull-down menu and submit your response by choosing the Go button.

       > **Note:** The Respond to Notifications as Group page does not display

any default values for the response prompts. You must enter the response values you want to submit.

4. If these notifications require a password-based electronic signature, then the Sign Notifications as Group page appears after you submit your response. This page displays the list of selected notifications and the response values that you entered to let you review the response you are signing. If the notifications require the signed response to include the message body, then this page also displays the message body for you to review.

- To view the full details of a notification, click the subject link for the notification.

- To affix your electronic signature to your response, enter your Oracle E-Business Suite user name and password and select the Sign button. This electronic signature is analogous to your written signature. See: #WF_SIG_POLICY Attribute, *Oracle Workflow Developer's Guide*.

> **Note:** If your site has implemented single sign-on functionality and your single sign-on password is different than your Oracle Application Object Library password, you must use your Oracle Application Object Library password to sign notifications. See: Electronic Signatures, page 3-2.

5. If these notifications require a certificate-based digital signature, then the Sign Notifications as Group page appears after you submit your response. This page displays the list of selected notifications, including their signing status. The page also displays the response values that you entered to let you review the response you are signing. If the notifications require the signed response to include the message body, then this page additionally displays the message body for you to review.

- To view the full details of a notification, click the subject link for the notification.

- To affix your electronic signature to your response, click **Sign** and use your Web browser to enter your X.509 certificate as your signature. For detailed instructions, please refer to the online help for your Web browser. If you have multiple certificates installed, ensure that you enter a certificate that is assigned to the Oracle E-Business Suite user name with which you logged in. See: Electronic Signatures, page 3-2 and #WF_SIG_POLICY Attribute, *Oracle Workflow Developer's Guide*.

  If all the selected notifications are successfully signed, then Oracle Workflow saves your response with your signature.

If Oracle Workflow encounters any errors during the signing process, then a message appears to indicate that some notifications could not be signed.

- If you want to save your response for the notifications that were successfully signed only, click **Yes**. In this case, the notifications that were not signed will remain open in your worklist.

- If you want to review the errors or retry the signing process before saving your response for any of the selected notifications, click **No**.

- In the Sign Notifications as Group page, click **Refresh Status** to display the latest `Success` or `Error` signing status for the selected notifications.

- To retry the signing process, click **Sign** again. For example, if you have multiple certificates installed, you can try signing with a different certificate.

- To save your response for the notifications that have been successfully signed only, click **Submit** in the Sign Notifications as Group page. In this case, the notifications that were not signed will remain open in your worklist.

To Request More Information From Another User:

1. Navigate to the Request More Information page.

2. Use the Request More Information From option to specify the user or role from whom you want to request information.

   - To specify another user or role previously involved in this workflow process, select the Workflow Participant option and select the user or role you want from the pull-down menu. This list includes users who have participated in this workflow process or its parent process, and may also include additional users designated as participants for this message. See: #MORE_INFO_PARTICIPANTS Attribute, *Oracle Workflow Developer's Guide*.

   - To specify any user listed in the directory service, select the Any User option, and select a type of user or role. Then select the user or role you want within that type.

     > **Note:** The user and role types correspond to the originating system partitions in the Oracle Workflow directory service. See: Setting Up a Directory Service for Oracle Workflow, *Oracle Workflow Administrator's Guide*.

     > If an administrator has restricted the user list of values, then only the values to which you have access appear in the list. See: Configuring the Oracle Workflow User List of Values, *Oracle*

3. Enter details about what information you are requesting in the Information Requested field.

4. Select the Submit button to send your request to the specified user. You can also select the Cancel button to return to the previous page without sending your request.

5. After you request more information for a notification, that notification does not appear in your Worklist as an open notification until the user you specified responds to your request. However, you can still review the notification while your request is pending, by choosing to view Notifications From Me in your Worklist and then opening the Notification Details page for the notification you want.

   • If you do not want to wait any longer for the additional information you requested, you can respond to the notification using the Response section of the Notification Details page. In this case, your pending request for more information is canceled.

   • If you want to request more information from a different user, you can submit a new request using the Request Information button in the Response section of the Notification Details page. In this case, your initial request is replaced by the new request, and only the user to whom you sent the new request can respond with more information.

Related Topics

Viewing Notifications from the Personal Worklist, page 3-42

Vacation Rules

Use vacation rules to handle your notifications automatically when you are not available to manage your notifications directly, such as when you 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 your worklist. See: #HIDE_REASSIGN

Attribute, *Oracle Workflow Developer's Guide*.

Additionally, an administrator can disable reassignment of notifications to the process owner who initiated the workflow or the from role for the notification. In this case, if a vacation rule would reassign a notification to either of these roles, then Oracle Workflow does not apply the rule, but simply delivers the notification to the worklist of the original recipient. Oracle Workflow also adds a row to the action history for the notification showing that the reassignment was prevented and the rule was not applied. See: Setting the WF: Disable Reassign to Submitter Profile Option, *Oracle Workflow Administrator's Guide*, From Role, page 3-20 , and Action History, *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 your response, you cannot respond to the notification through a vacation rule. In this case Oracle Workflow simply delivers the notification to your worklist. You must use the Notification Details page to submit your response and provide your signature. See: To View the Details of a Notification, page 3-26.

- Deliver the notification to your worklist as usual, with no further action

Use the Vacation Rules page to define your rules for automatic notification processing. Your workflow administrator can also define rules for you. See: Defining Vacation Rules for Users, *Oracle Workflow Administrator's Guide*.

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 you, Oracle Workflow tests the notification against your vacation rules. First Oracle Workflow checks whether you have any active rules for that specific message type. If not, it checks whether you have any active rules for that specific item type. Finally, it checks whether you have 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'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 performing any further forwarding rules, marking the notification as being in error.

If you receive a request for more information about another notification, Oracle Workflow applies the same vacation rule that would apply for the message name and message type of the original notification.

- For a reassign rule, Oracle Workflow transfers the request for more information to the specified user with a comment that conveys the rule information. A request for more information cannot be delegated, only transferred, so in this case Oracle Workflow always transfers the request, even if the reassign rule is defined to use delegate mode.

  Note: Responding to a request for more information is not subject to the same security concerns as responding to the original notification, so a request for more information can be transferred to the process owner or the from role if a reassign rule with such a specification applies, even if an administrator has disabled such reassignments for other notifications.

- For a respond rule, Oracle Workflow answers the request for more information with a response informing the requester that you are absent.

- For a deliver rule, Oracle Workflow delivers the request for more information to your worklist as usual.

  Note: Vacation rules do not apply for responses to requests for more information. If you requested more information about a notification and you receive a response to that request, both the response and the original notification remain in your own worklist.

To View and Maintain Vacation Rules:

1. Navigate to the Vacation Rules page by navigating to your Worklist and selecting the Vacation Rules link.

   The list of your vacation rules includes rules that you defined yourself as well as any rules defined for you by an administrator. A rule's active or inactive status depends on whether the current date falls within the rule's effective dates.

2. To update a rule, select the Update icon for that rule. See: To Create or Update a Vacation Rule, page 3-39.

3. To delete a rule, select the Delete icon for that rule.

4. To create a new rule, select the Create Rule button. See: To Create or Update a Vacation Rule, page 3-39.

To Create or Update a Vacation Rule:

1. Navigate to the Vacation Rules page and choose to create or update a rule.

    *   If you choose to create a new rule, the Vacation Rule: Item Type page appears first. Continue with step 2.

    *   If you choose to update an existing rule, the Vacation Rule: Response page appears. Skip to step 6.

2. In the Vacation Rule: Item Type page, select the item type to which this rule applies.

    *   By default, the list of values for the Item Type field displays those item types for which you have previously received at least one notification. Your workflow administrator can also add item types to this list to let you create vacation rules to handle other notifications you may receive in the future.

    *   If your workflow administrator has enabled creating generic vacation rules, you can select the All option in the Item Type field. In this case the rule to applies to notifications associated with any item type.

    See: Setting Up Notification Handling Options, *Oracle Workflow Administrator's Guide*.

3. Choose the Next button to proceed.

    *   If you selected All as the item type for the rule, the Vacation Rule: Response page appears. Skip to step 6.

    *   If you selected a specific item type, the Vacation Rule: Notification page appears. Continue with step 4.

4. In the Vacation Rule: Notification page, select the notification message to which this rule applies or select All if you want this rule to apply to all notifications in the selected item type.

5. Choose the Next button.

6. If you choose to update a rule from the Vacation Rules page, choose All in the Vacation Rule: Item Type page, or complete the Vacation Rule: Notification page, the Vacation Rule: Response page appears. The fields in this page vary depending on the item type(s) and notification(s) to which this rule applies. For example, if your rule applies to all item types, you can automatically reassign all the notifications to another user, but you cannot define an automatic response to all the notifications since different notifications may have different response attributes.

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

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

> **Important:** Since you can define different rules for the same
> notification(s) to be effective at different times, Oracle Workflow
> allows you to define multiple rules for the same notification(s). You
> should be careful to ensure that rules for the same notification(s) do
> not overlap in their effective dates. If multiple rules are effective for
> the same notification, Oracle Workflow picks one rule at random to
> apply.
>
> Specify the Start Date and End Date values according to your client
> time zone.

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

9. Choose the action that you want this rule to perform:

    -   "Reassign" - Forward the notification to a designated user.

    -   "Respond" - Respond to the message with a set of predefined response values.

        > **Note:** If this notification requires a password-based signature
        > or certificate-based digital signature in your response, you
        > cannot respond to the notification through a vacation rule. In
        > this case Oracle Workflow simply delivers the notification to
        > your worklist. You must use the Notification Details page to
        > submit your response and provide your signature. See: To
        > View the Details of a Notification, page 3-26.

    -   "Deliver notifications to me regardless of any general rules" - Leave the
        notification in your Worklist with no automatic processing. You can define a
        rule with this action to exclude a certain subset of notifications from a more
        encompassing rule. For example, suppose you have a rule that reassigns all
        your notification messages to another user, but you want to exclude a subset of
        notifications from that rule. To accomplish this, you can define a new rule that
        applies only to that subset of notifications, whose action is "Deliver notifications
        to me...".

10. If your rule action is "Reassign", select the type of user or role to which you want to
    reassign the notifications. Then select the user or role you want within that type.

    > **Note:** The assignee types correspond to the originating system

partitions in the Oracle Workflow directory service. See: Setting Up a Directory Service for Oracle Workflow, *Oracle Workflow Administrator's Guide*.

If an administrator has restricted the users to whom you can reassign the notification, then only the values to which you have access appear in the list. See: #WF_REASSIGN_LOV Attribute, *Oracle Workflow Developer's Guide* and Configuring the Oracle Workflow User List of Values, *Oracle Workflow Administrator's Guide*.

Note: An administrator can disable reassignment of notifications to the process owner who initiated the workflow or the from role for the notification. In this case, if a vacation rule would reassign a notification to either of these roles, then Oracle Workflow does not apply the rule, but simply delivers the notification to the worklist of the original recipient. Oracle Workflow also adds a row to the action history for the notification showing that the reassignment was prevented and the rule was not applied. See: Setting the WF: Disable Reassign to Submitter Profile Option, *Oracle Workflow Administrator's Guide*, From Role, page 3-20, and Action History, *Oracle Workflow Developer's Guide*.

Then specify how you want to reassign the notifications.

- "Delegate your response" - Select this option if you want to give the new user authority to respond to the notification on your behalf, but you want to retain ownership of the notification yourself. For example, a manager might delegate all vacation scheduling approvals to an assistant.

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

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

11. If your rule action is "Respond", set the values that you want to automatically respond with.

Viewing Notifications from the Personal Worklist

> **Note:** Before you can access the Personal Worklist, your system administrator must add it to the menu for an Oracle E-Business Suite responsibility that is assigned to you. See: Adding Worklist Functions to User Responsibilities, *Oracle Workflow Administrator's Guide*.

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

Oracle Workflow provides the following preconfigured views:

- All Notifications

- FYI Notifications

- Notifications From Me

- Open Notifications

- To Do Notifications

Other Oracle E-Business Suite applications, as well as your system administrator, may also provide preconfigured views. The views that are available may depend on the responsibility through which you access the Personal Worklist. See: Defining Specialized Worklist Views with Worklist Flexfields, *Oracle Workflow Administrator's Guide*.

When viewing notifications from the Personal Worklist, you can respond to your notifications, reassign notifications to another user, request more information about a notification from another user, and respond to requests for information. You can also define vacation rules to handle notifications automatically in your absence.

Through the Oracle E-Business Suite proxy user feature, you can view the worklists of any other users who have granted you access. When you view the Personal Worklist as a proxy for another user, you can search for, view, and act on that user's notifications. However, you cannot define vacation rules for that user. If the other user granted you access only to selected item types, then when you view that user's worklist, the page displays only notifications that belong to those item types. Additionally, you can only

display and maintain your own views, based on your user name and the responsibility through which you accessed the Personal Worklist, although the views show the other user's notifications.

To View Notifications from the Personal Worklist:

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

2. To perform a one-time search to locate notifications that match your criteria, select the Simple Search button. From the Simple Search page, you can also navigate to the Advanced Search page. See: To Perform a Simple Search for Notifications, page 3-46.

3. To specify which notifications to display in the Worklist, select the type of notifications you want from the View pull-down menu and select Go.

    You can choose from the preconfigured views, or you can create your own personalized views to display notifications that match criteria that you specify. To maintain your personalized views, select the Personalize button. See: To View and Maintain Personal Worklist Views, page 3-52.

    The views that are available may depend on the responsibility through which you access the Personal Worklist.

4. The view you select determines what information the Personal Worklist shows for each notification. The preconfigured views provided by Oracle Workflow show the following information:

    *   Subject-a description of the notification.

    *   From-the role from which the notification was sent. This column is displayed when you view notifications sent to you.

    *   To-the role to which the notification was sent. This column is displayed when you view notifications sent from you.

    *   Sent-date when the notification was delivered.

    *   Type-display name of the item type to which the workflow process that sent the notification belongs.

    *   Status-open, closed, or canceled status of the notification. This column is displayed when you view all notifications.

    *   Due-date by which the notification should be completed.

    Select a column heading to sort the list by that column. By default, the list is sorted by sent date from most recent to oldest, and then by subject in alphabetical order.

5. You can navigate to the full details of any notification and act on the notification by clicking on the notification's Subject link or by selecting the notification and then choosing Open. See: To View the Details of a Notification, page 3-26.

6. To view a notification in the Notification Details pop-up window, if this window is enabled, position the cursor over the notification subject link. The pop-up window lets you view the notification details quickly without leaving the current page. To act on the notification, select the Go to Details Page link in the pop-up window. See: Enabling the Notification Details Pop-up Window, *Oracle Workflow Administrator's Guide*.

7. To collectively reassign a group of notifications, select the notifications you want and select the Reassign button. See: To Reassign a Notification to Another User, page 3-30.

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

8. If your workflow administrator has enabled the Respond button on this page, you can respond to a group of notifications collectively. To do so, select the notifications you want and select the Respond button. The notifications must all belong to the same workflow type and message definition so that the response values you provide will match all the notifications in the group.

> **Note:** You can only use the Respond button to respond to notifications that are open, require a response, and do not contain a request from another user for more information about another notification. To help determine which notifications you can respond to, use the View pull-down menu to display your open notifications or your To Do notifications. To respond to notifications that contain a request for more information, you must access the notifications individually through the Notification Details page.

See: To Respond to a Group of Notifications, page 3-33 and Setting the WF: Enable Bulk Notification Response Profile Option, *Oracle Workflow Administrator's Guide*.

> **Note:** If you select only one notification before choosing the

Respond button, Oracle Workflow displays the Notification Details page for that notification rather than the Respond to Notifications as Group page. See: To View the Details of a Notification, page 3-26 .

9. To collectively close a group of FYI notifications, select the notifications you want and select the Close button. In the confirmation page, choose Apply.

> **Note:** You can only use the Close button to close notifications that are open and do not require a response. To help determine which notifications you can close, use the View pull-down menu to display your open notifications or your FYI notifications.

10. To define vacation rules, select the Vacation Rules link. See: To View and Maintain Vacation Rules, page 3-38.

11. If your site is configured to grant proxy users worklist access with implicit Oracle Workflow responsibility access, then a Worklist Access tip link appears. To grant access to your worklist to another user, select this link. See: Granting Worklist Access with Implicit Oracle Workflow Responsibility Access., *Oracle E-Business Suite Security Guide*.

12. If you have been granted access to another user's worklist and your site is configured to grant proxy users worklist access with implicit Oracle Workflow responsibility access, then a Switch User button appears. To view another user's worklist, select this button and select the user whose worklist you want to view. See: Acting as a Worklist Proxy User with Implicit Oracle Workflow Responsibility Access, *Oracle E-Business Suite Security Guide*.

> **Note:** When you view a worklist other than your own, the Personal Worklist displays the name of the user to whom the worklist belongs. You can search for, view, and act on that user's notifications. However, you cannot define vacation rules for that user or grant access to that user's worklist to anyone else. If the other user granted you access only to selected item types, then when you view that user's worklist, the page displays only notifications that belong to those item types. Additionally, you can only display and maintain your own views, based on your user name and the responsibility through which you accessed the Personal Worklist, although the views show the other user's notifications.

To Perform a Simple Search for Notifications:

1. Navigate to the Simple Search page.

2. To locate specific notifications, enter your search criteria. The search options are:

   - Subject - Enter the subject line of the notification you want to display. You can enter a partial value to search for notifications whose subjects contain that value. This field is case insensitive.

   - From - Enter the role from which the notifications you want to display were sent. You can enter a partial value to search for notifications whose from roles contain that value. This field is case insensitive.

   - Sent - Enter the date when the notifications you want to display were delivered, using the date format you chose in your Oracle E-Business Suite general preferences. Select the field's calendar icon to display a calendar from which you can select a date.

3. Select the Go button to perform your search.

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

   - Subject - a description of the notification.

   - From - the role from which the notification was sent.

   - Sent - date when the notification was delivered.

   - Type - display name of the item type to which the workflow process that sent the notification belongs.

   - Status - open, closed, or canceled status of the notification.

   - Due - date by which the notification should be completed.

   Select a column heading to sort the list by that column. By default, the list is sorted by sent date from most recent to oldest and then by subject in alphabetical order.

5. You can navigate to the full details of any notification and act on the notification by clicking on the notification's Subject link or by selecting the notification and then choosing Open. See: To View the Details of a Notification, page 3-26.

6. To view a notification in the Notification Details pop-up window, if this window is enabled, position the cursor over the notification subject link. The pop-up window lets you view the notification details quickly without leaving the current page. To act on the notification, select the Go to Details Page link in the pop-up window. See:

Enabling the Notification Details Pop-up Window, *Oracle Workflow Administrator's Guide*.

7. To collectively reassign a group of notifications, select the notifications you want and select the Reassign button. See: To Reassign a Notification to Another User, page 3-30.

8. If your workflow administrator has enabled the Respond button on this page, you can respond to a group of notifications collectively. To do so, select the notifications you want and select the Respond button. The notifications must all belong to the same workflow type and message definition so that the response values you provide will match all the notifications in the group.

    > **Note:** You can only use the Respond button to respond to notifications that are open, require a response, and do not contain a request from another user for more information about another notification. To respond to notifications that contain a request for more information, you must access the notifications individually through the Notification Details page.

    See: To Respond to a Group of Notifications, page 3-33 and Setting the WF: Enable Bulk Notification Response Profile Option, *Oracle Workflow Administrator's Guide*.

    > **Note:** If you select only one notification before choosing the Respond button, Oracle Workflow displays the Notification Details page for that notification rather than the Respond to Notifications as Group page. See: To View the Details of a Notification, page 3-26
    > .

9. To collectively close a group of FYI notifications, select the notifications you want and select the Close button. In the confirmation page, choose Apply.

    > **Note:** You can only use the Close button to close notifications that are open and do not require a response.

10. To define vacation rules, select the Vacation Rules link. See: To View and Maintain Vacation Rules, page 3-38.

11. If your site is configured to grant proxy users worklist access with implicit Oracle Workflow responsibility access, then a Worklist Access tip link appears. To grant access to your worklist to another user, select this link. See: Granting Worklist Access with Implicit Oracle Workflow Responsibility Access., *Oracle E-Business Suite Security Guide*.

12. To save your current search criteria as a personalized view for the worklist, select the Save Search button. See: To Create or Update a Personal Worklist View, page 3-53.

13. You can also select the Advanced Search button to perform a search with more complex criteria, or select the Worklist Views button to navigate back to the Worklist. See: To Perform an Advanced Search for Notifications, page 3-48.

To Perform an Advanced Search for Notifications:

1. Navigate to the Advanced Search page.

2. Specify how you want to apply search criteria to locate specific notifications.

- "Search results where each must contain all values entered" - Select this option to locate only notifications that match all your search criteria.

- "Search results where each may contain any value entered" - Select this option to locate all notifications that match at least one of your search criteria.

3. Enter the search criteria you want to use to locate notifications. The following search options are displayed by default:

- Subject

- From

- Message Attribute

- Sent

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

> **Note:** You can choose to display more than one search option of the same type if you want to apply several search criteria to the same notification property. For example, if you want to search for notifications that were sent between two particular dates, you can display two Sent search options. Set one option to search for all notifications sent after the first date, and set the other option to search for all notifications sent before the second date. If you choose "Search results where each must contain all values entered", then the search will display notifications that match both search criteria, with sent dates falling in between the two dates that you specified.

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

   For the `is` filter operator, you should enter a complete filter value that you want to match. For the other filter operators, you can enter a partial value, unless you are using the Sent, Due, and Closed search options, which always require a complete date in the date format you chose in your Oracle E-Business Suite general preferences. The filter value fields for all search options are case insensitive.

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

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

   • Subject - Enter the subject line of the notifications.

   • From - Enter the role from which the notifications were sent.

   • Message Attribute - Enter the value of a message attribute belonging to the notification. Message attributes hold dynamic content that is determined by the specific context in which a notification is sent. For example, a notification in a requisition workflow might have a message attribute for the requisition amount. Message attribute values can be numbers, dates, or text.

   • Sent - Enter the date when the notifications were delivered, using the date format you chose in your Oracle E-Business Suite general preferences. Select the field's calendar icon to display a calendar from which you can select a date.

   • Type - Enter the display name of the item type to which the workflow process that sent the notification belongs.

   • Status - Enter `open`, `closed`, or `canceled` as the notification status.

   • To - Enter the role to which the notifications were sent.

   • Information Requested From - Enter the role to which notifications that are requests for more information were sent.

   • Due - Enter the date by which the notifications should be completed, using the date format you chose in your Oracle E-Business Suite general preferences. Select the field's calendar icon to display a calendar from which you can select a date.

   • Closed - Enter the date when the notifications were closed or canceled, using

the date format you chose in your Oracle E-Business Suite general preferences. Select the field's calendar icon to display a calendar from which you can select a date.

- Priority - Enter `high`, `normal`, or `low` as the notification priority.

- Response Required - Enter `yes` or `no` to specify whether the notifications require a response from the recipient.

- FYI - Enter `yes` or `no` to specify whether the notifications are for your information (FYI) only and do not require a response.

- Notification ID - Enter the numerical notification identifier.

- From Me - Enter `yes` to specify that the notifications are sent from you or `no` to specify that the notifications are sent from another role.

- Type Internal Name - Enter the internal name of the item type to which the workflow process that sent the notification belongs.

- Message Name - Enter the internal name of the message sent by the notification.

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

5. Select the Go button to perform your search.

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

- Subject - a description of the notification.

- From - the role from which the notification was sent. This column is displayed when you view notifications sent to you.

- Sent - date when the notification was delivered.

- Type - display name of the item type to which the workflow process that sent the notification belongs.

- Status - open, closed, or canceled status of the notification.

- Due - date by which the notification should be completed.

   Select a column heading to sort the list by that column. By default, the list is sorted by sent date from most recent to oldest and then by subject in alphabetical order.

7. You can navigate to the full details of any notification and act on the notification by clicking on the notification's Subject link or by selecting the notification and then choosing Open. See: To View the Details of a Notification, page 3-26.

8. To view a notification in the Notification Details pop-up window, if this window is enabled, position the cursor over the notification subject link. The pop-up window lets you view the notification details quickly without leaving the current page. To act on the notification, select the Go to Details Page link in the pop-up window. See: Enabling the Notification Details Pop-up Window, *Oracle Workflow Administrator's Guide*.

9. To collectively reassign a group of notifications, select the notifications you want and select the Reassign button. See: To Reassign a Notification to Another User, page 3-30.

10. If your workflow administrator has enabled the Respond button on this page, you can respond to a group of notifications collectively. To do so, select the notifications you want and select the Respond button. The notifications must all belong to the same workflow type and message definition so that the response values you provide will match all the notifications in the group.

      Note: You can only use the Respond button to respond to notifications that are open, require a response, and do not contain a request from another user for more information about another notification. To respond to notifications that contain a request for more information, you must access the notifications individually through the Notification Details page.

   See: To Respond to a Group of Notifications, page 3-33 and Setting the WF: Enable Bulk Notification Response Profile Option, *Oracle Workflow Administrator's Guide*.

      Note: If you select only one notification before choosing the Respond button, Oracle Workflow displays the Notification Details page for that notification rather than the Respond to Notifications as Group page. See: To View the Details of a Notification, page 3-26 .

11. To collectively close a group of FYI notifications, select the notifications you want and select the Close button. In the confirmation page, choose Apply.

> **Note:** You can only use the Close button to close notifications that are open and do not require a response.

12. To define vacation rules, select the Vacation Rules link. See: To View and Maintain Vacation Rules, page 3-38.

13. If your site is configured to grant proxy users worklist access with implicit Oracle Workflow responsibility access, then a Worklist Access tip link appears. To grant access to your worklist to another user, select this link. See: Granting Worklist Access with Implicit Oracle Workflow Responsibility Access., *Oracle E-Business Suite Security Guide*.

14. To save your current search criteria as a personalized view for the worklist, select the Save Search button. See: To Create or Update a Personal Worklist View, page 3-53.

15. You can also select the Simple Search button to perform a search with less complex criteria, or select the Worklist Views button to navigate back to the Worklist. See: To Perform a Simple Search for Notifications, page 3-46.

To View and Maintain Personal Worklist Views:

1. Navigate to the Personalize Views page.

   The Personalize Views page displays all existing views for the role and responsibility you are logged in with, including both preconfigured views and your personalized views. For each view, the list displays the view name, description, whether the view appears as a choice in the View menu in the Personal Worklist, and whether the view is set as your default view.

2. In the Display View column for a personalized view, select Yes to include the view in the View menu in the Personal Worklist, or select No to exclude the view from the View menu. Then choose the Apply button to save your changes.

   > **Note:** Preconfigured views always appear in the View menu. You cannot change this setting for those views.

3. To update a view, select the icon in the Update column for that view. See: To Create or Update a Personal Worklist View, page 3-53.

   > **Note:** You can only update personal views that you created. You cannot update preconfigured views.

4. To delete a view, select the icon in the Delete column for that view.

> **Note:** You can only delete personal views that you created. You cannot delete preconfigured views.

5. To create a view that is a duplicate of an existing view, select the existing view that you want to copy and select the Duplicate button. See: To Create or Update a Personal Worklist View, page 3-53.

6. To create a new view, select the Create View button. See: To Create or Update a Personal Worklist View, page 3-53.

To Create or Update a Personal Worklist View:

1. Navigate to the Create View page, the Duplicate View page, or the Update View page by one of the following methods.

   - In the Personalize Views page, either select the Create View button, select a view and select the Duplicate button, or select the update icon for a view.

   - After performing a search in the Simple Search page or the Advanced Search page, select the Save Search button.

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

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

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

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

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

   > **Note:** Although you cannot update any settings for the preconfigured views provided by Oracle Workflow, if you want to use a preconfigured view as your default view, you can create a duplicate of the preconfigured view and check Set as Default for the duplicate view. The preconfigured All Notifications view is

used as the default view if no other default is set.

5. Enter an optional description for the view.

6. In the Column Properties region, specify the notification property columns you want to display in the view and the order in which to display them. The Columns Displayed list shows the columns that are currently set to display, while the Available Columns list shows the columns that are not currently set to display but that you can choose to add.

   - To add a column to the view, select the column in the Available Columns list and choose the Move button. You can also choose the Move All button to add all available columns.

   - To remove a column from the view, select the column in the Columns Displayed list and choose the Remove button. You can also choose the Remove All button to remove all the columns.

   - To specify the order in which the columns are displayed, select a column in the Columns Displayed list and use the top, up, down, or bottom arrow buttons to move the column to the position you want in the list.

   The available columns include standard notification property columns as well as worklist flexfields columns. Include worklist flexfields columns in your view only if your system administrator has defined worklist flexfields rules to store message attributes in these columns. See: Defining Specialized Worklist Views with Worklist Flexfields, *Oracle Workflow Administrator's Guide*.

   > **Note:** A view can include worklist flexfields columns that are mapped by different rules. However, to display meaningful values in the view, you should select columns that are mapped by rules for the same item types.

7. If you want to change the display names for the notification property columns in the view, select the Rename Columns/Totaling button. In the Rename Columns/Totaling page, enter the new name for each column and select the Apply button.

8. In the Sort Settings region, you can specify up to three levels of sorting for the notifications in the view. For each level of sorting, select the notification property column by which you want to sort and specify whether to sort in ascending or descending order.

9. In the Search Query to Filter Data in your Table region, specify how you want to apply search criteria to locate specific notifications to display in the view.

- "Search results where each must contain all values entered" - Select this option to locate only notifications that match all your search criteria.

- "Search results where each may contain any value entered" - Select this option to locate all notifications that match at least one of your search criteria.

10. Enter the search criteria you want to use to locate notifications to display in the view.

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

   > **Note:** You can choose to display more than one search option of the same type if you want to apply several search criteria to the same notification property. For example, if you want to search for notifications that were sent between two particular dates, you can display two Sent search options. Set one option to search for all notifications sent after the first date, and set the other option to search for all notifications sent before the second date. If you choose Search results where each must contain all values entered, then the search will display notifications that match both search criteria, with sent dates falling in between the two dates that you specified.

   > **Note:** If you include worklist flexfields columns in the view, you should display only notifications from the relevant item types. Add the Type search option or the Type Internal Name search option to the search query for the view, and specify the item type display name or internal name, respectively. You can add multiple instances of these parameters to include multiple item types in the view. In this case, select the Search results where each may contain any value entered option.

   > If you do not limit the item types included in the view, then the view may display notifications from other item types with blank values or unrelated values in the worklist flexfields columns.

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

   For the is filter operator, you should enter a complete filter value that you want to match. For the other filter operators, you can enter a partial value, unless you are using the Sent, Due, and Closed search options, which always require a complete date in the date format you chose in your Oracle E-Business Suite general preferences. The filter value fields for all search options are case insensitive.

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

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

- Subject - Enter the subject line of the notifications.

- From - Enter the role from which the notifications were sent.

- Message Attribute - Enter the value of a message attribute belonging to the notification. Message attributes hold dynamic content that is determined by the specific context in which a notification is sent. For example, a notification in a requisition workflow might have a message attribute for the requisition amount. Message attribute values can be numbers, dates, or text.

- Sent - Enter the date when the notifications were delivered, using the date format you chose in your Oracle E-Business Suite general preferences. Select the field's calendar icon to display a calendar from which you can select a date.

- Type - Enter the display name of the item type to which the workflow process that sent the notification belongs.

- Status - Enter `open`, `closed`, or `canceled` as the notification status.

- To - Enter the role to which the notifications were sent.

- Information Requested From - Enter the role to which notifications that are requests for more information were sent.

- Due - Enter the date by which the notifications should be completed, using the date format you chose in your Oracle E-Business Suite general preferences. Select the field's calendar icon to display a calendar from which you can select a date.

- Closed - Enter the date when the notifications were closed or canceled, using the date format you chose in your Oracle E-Business Suite general preferences. Select the field's calendar icon to display a calendar from which you can select a date.

- Priority - Enter `high`, `normal`, or `low` as the notification priority.

- Response Required - Enter `yes` or `no` to specify whether the notifications require a response from the recipient.

- FYI - Enter `yes` or `no` to specify whether the notifications are for your information (FYI) only and do not require a response.

- Notification ID - Enter the numerical notification identifier.

- From Me - Enter `yes` to specify that the notifications are sent from you or `no` to specify that the notifications are sent from another role.

- Type Internal Name - Enter the internal name of the item type to which the workflow process that sent the notification belongs.

- Message Name - Enter the internal name of the message sent by the notification.

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

12. Select the Apply button to save the view and return to the Personalize Views page, or select the Apply and View Results button to save the view and display it immediately in the Personal Worklist.

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

Related Topics

Viewing Notifications from a Web Browser, page 3-20

Managing Proxy Users, *Oracle E-Business Suite Security Guide*

4

Monitoring Workflow Processes

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

This chapter covers the following topics:

- Monitoring Workflow Processes with the Self-Service Monitor
- Viewing Workflows in the Status Monitor
- Viewing the Notification History
- Viewing a Status Diagram
- Viewing Responses
- Viewing Error Information for a Workflow

Monitoring Workflow Processes with the Self-Service Monitor

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

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

> **Note:** If you intervene in a workflow process with an administrative operation such as reassigning a notification, then Oracle Workflow updates the audit trail for the process to show that you performed that operation.

1. Viewing Workflows in the Status Monitor, page 4-2

2. Viewing Notification History, page 4-3

3. Viewing a Status Diagram, page 4-4

4. Viewing Responses, page 4-7

5. Viewing Error Information for a Workflow, page 4-9

Viewing Workflows in the Status Monitor

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

> **Conditional Action:** If your Oracle E-Business Suite instance uses Java Web Start to launch Java applications including the Status Monitor, instead of using the Java Plug-in, then you may need to perform configuration steps specific to your browser. See: My Oracle Support Knowledge Document 2188898.1, *Using Java Web Start with Oracle E-Business Suite*.

To Search for Workflows in the Status Monitor:

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

2. To locate specific workflows, enter search criteria in the Search region. The main search option is:

    • Status - Choose the status of the workflows you want to review, or choose Any Status to display workflows in any status.

        • In Process - Workflows that do not have an end date (including errored workflows)

        • Complete - Workflows that have an end date

        • Error - Workflows that do not have an end date and have at least one errored activity

3. You can also enter additional search criteria to search for workflows by other workflow characteristics. To show the additional options if they are hidden, select the Show More Search Options link. To hide these options if they are shown, select the Hide Search Options link. The additional search criteria are:

- Workflow Started - Choose Today, This Week (last seven days), Last 2 Weeks (last fourteen days), Last 30 Days, Last 60 Days, or Any Time to specify the start date of the workflows you want to review. All the start date ranges include the current date; for example, Last 2 Weeks includes today as well as the previous thirteen days.

- Workflow Type - Select the workflow type you want to review.

- Workflow - Enter the identifier for the workflow you want to review. You can enter a partial value to search for workflows whose identifiers begin with that value.

4. Select the Go button to perform your search.

5. The Results region displays the workflows that match your search criteria. For each workflow, the list displays the status, workflow type, workflow identifier, start date, and completion date.

   - Select the Workflow Type, Workflow, or Started column heading to sort the list by that column.

   - To view the error details for an errored workflow, select the error icon or the error link in the Status column.

6. You can use the monitor buttons to drill down to additional information for a workflow.

   - To review the notifications sent by a workflow, select the workflow and select the Notification History button.

   - To view the status diagram for a workflow, select the workflow and select the Status Diagram button.

   - To review notifications sent by a workflow and participant responses, select the workflow and select the Participant Responses button.

Related Topics

Accessing the Self-Service Monitor, page 4-1

Viewing the Notification History

The Notification History page shows information about the notifications sent by a workflow. The page identifies the displayed workflow by its user key if it has one, or by its internal item key if it does not have a user key.

- To send email to the recipient of a notification, select the user link in the Notification Recipient column.

    > **Note:** If more information has been requested for a notification, then the Notification Recipient column shows the user to whom the request for more information was sent, rather than the original recipient of the notification.

- If you have workflow administrator privileges, you can reassign a notification that is not yet complete. Select the notification you want to reassign and select the Reassign button. See: To Reassign a Notification to Another User, page 3-30.

    > **Note:** You cannot reassign a notification from the Status Monitor if the Expand Roles option is selected for the notification.
    >
    > Additionally, you cannot reassign a voting notification that tallies the recipients' responses. See: Voting Activity, *Oracle Workflow Developer's Guide*.

- To view the status diagram for the workflow, select the View Diagram button.

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

Related Topics

Accessing the Self-Service Monitor, page 4-1

Viewing a Status Diagram

The Status Diagram page shows the process diagram for a workflow, including graphical cues about the status of the workflow and its activities. The page identifies the displayed workflow by its user key if it has one, or by its internal item key if it does not have a user key.

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

Process Title:

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

process diagram, the process title displays the subprocess name.

Process Diagram Window:

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

> **Note:** The process diagram cannot be displayed in mobile browsers, nor in the Safari browser. You must use another supported desktop browser to view the diagram. See: *Recommended Browsers for Oracle E-Business Suite Release 12*, My Oracle Support Knowledge Document 389422.1.

Your workflow administrator can configure the display size for the status diagram. See: Setting Global User Preferences, *Oracle Workflow Administrator's Guide*.

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

- Status - Notification status

- Begin Date - Date notification is delivered

- End Date - Date notification is closed

- Due Date - Date activity is due to time out

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

Related Topics

Accessing the Self-Service Monitor, page 4-1

Viewing Responses

The Monitor Responses page shows information about notifications sent by a workflow and responses from workflow participants. For example, you can use this page to view individual responses to a voting activity. The page identifies the displayed workflow by its user key if it has one, or by its internal item key if it does not have a user key.

Specify the type and status of the notifications you want to view.

- Select the Response Notifications option to view response-required notifications, the FYI Notifications option to view information-only (FYI) notifications, or both.

- Select the Closed Notifications option to view only closed notifications of the selected type. Deselect this option to view both open and closed notifications.

Then review the notification list.

- To send email to the recipient of a notification, select the user link in the Recipient column.

- To view details about a notification and the recipient's response, select the details icon in the View Response Details column.

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 email 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 email 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 Signature Details region specifies whether the notification required an electronic signature, and if so, the signature type, either a password-based signature or a certificate-based digital signature. For a notification that required a signature, the region also displays the following information:

- Signature ID - The numerical identifier for the signature request. This information is shown only for certificate-based signatures.

- Signature - The text string representing the signature created using the signer's certificate. This information is shown only for certificate-based signatures.

- Actual Signer - The user who submitted the signature.

- Creation Date - The date when the request for a signature was created.

- Signed Date - The date when the user submitted the signature.

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

> **Note:** For information-only notifications or open response-required

notifications, the Notification Response Details page only shows details about the outbound notification.

Related Topics

Accessing the Self-Service Monitor, page 4-1

Electronic Signatures, page 3-2

Reviewing Electronic Signature Details, *Oracle Workflow Administrator's Guide*

Viewing Error Information for a Workflow

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

The page shows the workflow identifier, which is the workflow's user key if it has one, or its internal item key if it does not have a user key. Then the page shows these error details:

- Failed Activity - The name of the activity that encountered an error.

- Activity Type - The activity type, either Function, Notification, Event, or Process.

- Error Name - The internal name of the error.

- Error Message - The error message describing the error.

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

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

Related Topics

Accessing the Self-Service Monitor, page 4-1

A

Oracle Workflow User Navigation Paths

This appendix lists the navigation paths to Oracle Workflow user Web pages in the seeded Oracle Workflow responsibilities for Oracle E-Business Suite.

This appendix covers the following topics:

- Oracle Workflow User Navigation Paths

Oracle Workflow User Navigation Paths

This table shows the navigation paths to Oracle Workflow user Web pages in the seeded Oracle Workflow responsibilities for Oracle E-Business Suite. Your system administrator may have customized the responsibilities, menus, and navigation paths in your installation.

Oracle Workflow User Navigation Paths

Web Page	Standard Navigation Path
Self-Service Home, page 2-1	Workflow User Web Applications: Self Service Workflow > Home *or* Workflow User Web (New): Self Service Workflow > Home

Web Page	Standard Navigation Path
Advanced Worklist, page 3-22	Workflow User Web Applications: Advanced Worklist *or* Workflow User Web Applications: Self Service Workflow > Notifications *or* Workflow User Web (New): Self Service Workflow > Notifications *or* Workflow Administrator Web Applications: Administrator Workflow > Notifications *or* Workflow Administrator Event Manager: Administrator Workflow > Notifications *or* Workflow Administrator Web (New): Administrator Workflow > Notifications
Self-Service Status Monitor, page 4-1	Workflow User Web Applications: Self Service Workflow > Status Monitor *or* Workflow User Web (New): Self Service Workflow > Status Monitor

> **Note:** The Workflow Administrator Web (New) and Workflow User Web (New) responsibilities are provided for reference to highlight the Oracle Application Framework-based functionality in Oracle Workflow. The same functionality is also available on the Workflow Administrator Web Applications, Workflow Administrator Event Manager, and Workflow User Web Applications responsibilities.

B

Oracle Workflow User Personalizations

This appendix lists features that you can add to Oracle Workflow user Web pages through Oracle Application Framework Personalization.

This appendix covers the following topics:

- Oracle Workflow User Personalizations

Oracle Workflow User Personalizations

Oracle Application Framework Personalization provides the ability to customize Oracle self-service Web application pages. To personalize your pages, you must log in as a user or with a responsibility for which the Personalize Self-Service Defn profile option is set to Yes. You can then choose the Personalize Page global button to create personalizations for an entire page, or choose the Personalize link in a region to create personalizations for that region only.

Oracle Workflow supports several types of personalizations. This appendix lists features that do not appear in the Oracle Workflow user Web pages by default, but are available for you to add if you choose.

Many Oracle Workflow Web pages also let you perform other personalizations, such as displaying additional information columns in a list, changing the sort order of a list, or hiding features you do not want to use. To view all the personalizations that are available for a particular page, choose the Personalize button for that page.

For more information about creating personalizations, see: Personalization, *Oracle Application Framework Personalization Guide*.

Self-Service Home Page

Close Button

With the Close button you can select and close several notifications at the same time. Ensure that the notifications you select do not require a response.

Advanced Worklist

Close Button

The Close button is also available on the Advanced Worklist, with the same functionality as for the self-service home page.

Notification Details Page

Printable Page Button

The Printable Page button lets you display a notification in a format suitable for printing, without the application header, footer, and navigation options.

Notification ID

The Notification ID is displayed by default, but you can hide it if you choose.

Personal Worklist

Export Button

The Export button lets you export your worklist to a Microsoft Excel file. Choose the Export button, and specify the directory and file name where you want to save the file. Oracle Workflow saves the file as a Microsoft Excel Comma Separated Values File, with an extension of .csv. The exported file contains the information from the columns displayed in the current worklist view, for all notifications in the view.

Close Button

The Close button is also available on the Personal Worklist, with the same functionality as for the self-service home page.

> **Note:** The Personal Worklist also includes a Personalize button for the View pull-down menu; however, this button is separate from the Personalize Page global button and Personalize region links. The Personalize button lets you create and maintain personalized views for displaying notifications. This button is not controlled by the Personalize Self-Service Defn profile option, but always appears on the Personal Worklist. The Personalize Page global button and Personalize region links, on the other hand, let you personalize other features on a page beyond defining views. However, these options appear only if the Personalize Self-Service Defn profile option is set to Yes.

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 E-Business Suite 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 E-Business Suite application to have simultaneous queuing, your request can wait to run in more than one queue.

Directory Service

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 run outside of the Oracle Database.

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 predefine 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 email notifications to users through a mail application, and processes email 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 Activity

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

Process Definition

A workflow process as defined in Oracle Workflow Builder, which can be saved as a flat file or in a database.

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 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 runs 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.

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