Oracle® Workflow

User's Guide

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Send Us Your Comments

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

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  USA

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Preface

Intended Audience

Welcome to Release 2.6.4 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.
- Oracle Workflow.

  If you have never used Oracle Workflow, Oracle suggests you attend training classes available through Oracle University.
- The Oracle Applications graphical user interface.

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

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

TTY Access to Oracle Support Services

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

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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 Applications.

B Oracle Workflow User Personalizations

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

Glossary

Related Documents

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

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

Online Documentation

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

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

new documentation or documentation patches that you can download. About documents are available on Oracle*MetaLink*.

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

Related Guides

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

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

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

Guides Related to All Products

Oracle Applications User's Guide

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

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

Oracle Workflow Documentation Set

Oracle Workflow Administrator's Guide

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

Oracle Workflow Developer's Guide

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

Oracle Workflow API Reference

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

Guides Related to This Product

Oracle Assets User Guide

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

Oracle General Ledger User Guide

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

Oracle HRMS Documentation Set

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

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

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

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

  Use this guide to learn about entering employees.

Oracle Payables User Guide

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

Oracle Projects Implementation Guide

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

Oracle Purchasing User Guide

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

Oracle Receivables User Guide

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

Oracle Business Intelligence System Implementation Guide

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

BIS 11i User Guide Online Help

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

Using Oracle Time Management

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

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before installing Oracle Applications.

Installing Oracle Applications

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

Upgrading Oracle Applications

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

Maintaining Oracle Applications

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

Oracle Applications System Administrator's Guide

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

Oracle Alert User's Guide

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

Other Implementation Documentation

Oracle Applications Product Update Notes

Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between

Release 11.0 and Release 11*i*. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

Multiple Reporting Currencies in Oracle Applications

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

Multiple Organizations in Oracle Applications

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

Oracle Applications Flexfields Guide

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

Oracle Applications Developer's Guide

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

Oracle Applications User Interface Standards for Forms-Based Products

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

Oracle eTechnical Reference Manuals

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

Oracle Applications Message Reference Manual

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

Training and Support

Training

Oracle offers a complete set of training courses to help you and your staff master Oracle Workflow and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

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

Support

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

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

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

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

Integrating Systems

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

Major Features and Definitions

Oracle Workflow Builder

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

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

Workflow Engine

The Workflow Engine embedded in the Oracle Database implements process definitions at runtime. The Workflow Engine monitors workflow states and coordinates the routing of activities for a process. Changes in workflow state, such as the completion of workflow activities, are signaled to the engine via a PL/SQL API or a Java API. Based on flexibly-defined workflow rules, the engine determines which activities are eligible to run, and then runs them. The Workflow Engine supports sophisticated workflow rules, including looping, branching, parallel flows, and subflows.

Business Event System

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

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

Workflow Definitions Loader

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

Complete Programmatic Extensibility

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

Electronic Notifications

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

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

Electronic Mail Integration

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

Internet-Enabled Workflow

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

Monitoring and Administration

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

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

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

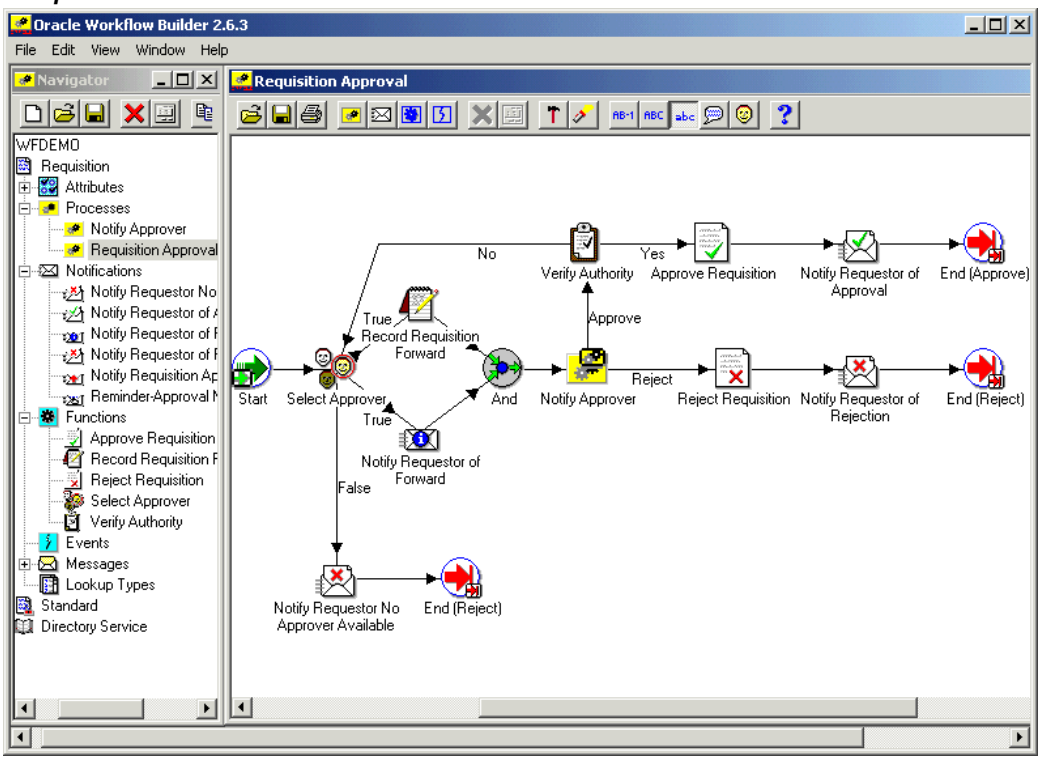
Workflow Processes

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

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

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

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 Home Page
- Setting User Preferences
- Accessing the Oracle Workflow Self-Service Home Page

Accessing the Oracle Workflow Home Page

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

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

> **Note:** For information about the self-service home page in Oracle Applications, see: Accessing the Oracle Workflow Self-Service Home Page, page 2-6.

To Access the Oracle Workflow Home Page:

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

   `<webagent>/wfa_html.home`

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

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

Standalone Oracle Workflow Home Page

2. The web page identifies the current version of Oracle Workflow.
3. A toolbar appears in the upper left corner of the Oracle Workflow home page, as well as on every other Oracle Workflow web page. The Home icon returns you to the Oracle Workflow home page. The name of the current page appears in the middle of the toolbar. The Logout icon logs you out of your current Oracle Workflow web session and the Help icon displays online help for the current screen. Some of the Event Manager web pages also include a Query icon that lets you enter query details to search for Event Manager objects.
4. Choose the Worklist link to display your list of workflow notifications. You can close or reassign your notifications directly from the Worklist or you can drill down to the details of each specific notification and close, reassign, or respond to them individually. See: To View Notifications from the Worklist, page 3-18.
5. Choose the Find Notifications link to locate notifications that match specific criteria and act on those notifications. See: To Find Notifications, page 3-16.
6. Choose the Notification Rules link to view and define your automatic notification routing rules. If you are logged in as a role with workflow administrator privileges, the Find Automatic Notification Processing Rules web page appears, letting you first display the routing rules for the role you specify. See: To Define a Rule for Automatic Notification Routing, page 3-22.
7. Choose the Find Processes link to query for a list of workflow process instances that match certain search criteria. Once you find a specific process instance, you can view its status details in the Workflow Monitor. See: Using the Find Processes Web Page, *Oracle Workflow Administrator's Guide*.

8. Choose the User Preferences link to set the preferences that control how you interact with Oracle Workflow. See: Setting User Preferences, page 2-3.

Setting User Preferences

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

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

To Set User Preferences:

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

   `<webagent>/wfa_html.home`

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

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

   `<webagent>/wf_pref.edit`

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

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

User Preferences Page (Summary)

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

User Preferences Page (Update)

3. In the Language and Territory fields, use the list of values to select the NLS_LANGUAGE and NLS_TERRITORY combination that defines the default language-dependent behavior and territory-dependent formatting of your notification sessions.

4. In the Date Format field, specify an Oracle Database-compliant date format to use for your database session. An example of an Oracle Database-compliant date format is DD-Mon-RRRR. If you do not specify a date format, then the date format defaults to DD-MON-YYYY.

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

5. Leave the Document Home Node field blank. This functionality is reserved for future use.

6. In the 'Send me electronic mail notifications' section, select a notification preference:

   - HTML mail with attachments - send you notifications as HTML e-mail with attached links to the Notification Details page. Your mail reader must be able to display HTML formatting in the message body.
   - Plain text mail with HTML attachments - send you notifications as plain text e-mail but include the HTML-formatted version of the notifications and links to the Notification Details page as attachments.

- Plain text mail - send you notifications as plain text e-mail.
- Plain text summary mail - send you a summary of all notifications as plain text e-mail. You must use the Worklist web page to take action on individual notifications.
- Do not send me mail - do not send you notifications as e-mail. You must view the notifications and take action from the Worklist web page.
- HTML mail - send you notifications as HTML e-mail only, without any standard attachments. If custom attachments have been defined for individual notifications in a process, however, those attachments will still be included. Your mail reader must be able to display HTML formatting in the message body.

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

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

Related Topics

Notification Preferences, *Oracle Workflow Administrator's Guide*

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 Applications. This page centralizes your access to the features.

Note: Oracle Applications Framework Personalization provides the ability to customize Oracle self-service web application pages. If you are logged in as a user or with a responsibility for which the Personalize Self-Service Defn profile option is set to Yes, you can choose the Personalize button or Personalize Region links to create your personalizations. For more information, please refer to Oracle*MetaLink* note 268969.1, *Oracle Applications 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 the home page in standalone Oracle Workflow, see: Accessing the Oracle Workflow Home Page, page 2-1.

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

3. The Notifications 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 3-30.
   - To define vacation rules, select the Vacation Rules link. See: To View and Maintain Vacation Rules, page 3-36.
   - To grant access to your worklist to another user, select the Worklist Access link. See: To Grant Access to Your Worklist, page 3-35.
   - To view the complete list of all your notifications, select the Full List button. When the full list is displayed, the Notifications region also displays the View pull-down menu, the Open button, and the Reassign, Delegate, or Transfer button.
     - To specify which notifications to display in the Worklist, select the type of notifications you want from the View pull-down menu and select Go. You can choose to view Open Notifications, FYI Notifications, To Do Notifications, All Notifications, or Notifications From Me. If you choose All Notifications, the list additionally displays the status for each notification. If you choose Notifications From Me, the list displays the recipient of each notification instead of the from role.
     - To view and respond to a notification or a group of notifications, select the notification or notifications you want and select the Open button. If you select more than one notification to open, only one notification is displayed at a time. You can navigate among the open notifications by selecting the Next or Back buttons in the Notification Details page. See: To View the Details of a Notification, page 3-30.
     - 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 3-32 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. See: #HIDE_REASSIGN Attribute, *Oracle Workflow Developer's Guide*.

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

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

- To view the error details for an errored workflow, select the error icon or the error link in the Status column. See: Viewing Error Information for a Workflow, page 4-6.
- 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, choose the Notifications tab, or select the Notifications link at the bottom of the page. See: To View Notifications from the Advanced Worklist, page 3-28.
6. To view the Workflow Monitor, choose the Status Monitor tab, or select the Status Monitor link at the bottom of the page. See: Accessing the Self-Service Monitor, page 4-1.

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 for Standalone Oracle Workflow
- Defining Rules for Automatic Notification Processing for Standalone Oracle Workflow
- Viewing Notifications from a Web Browser for Oracle Applications
- Vacation Rules for Oracle Applications
- Viewing Notifications from the Personal Worklist

Overview of Notification Handling

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

As a member of a role, you can view a notification using any one of three interfaces depending on your role's notification preference setting in the Oracle Workflow directory service. You can receive an e-mail for each individual notification, receive a single e-mail summarizing all your notifications or query the Workflow Notifications Web page for your notifications. If you choose to receive e-mail, you can also choose the format in which you want to receive the e-mail messages. See: Setting Up an Oracle Workflow Directory Service, *Oracle Workflow Administrator's Guide*, Setting User Preferences, page 2-3, and Preferences, *Oracle Applications User'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 Applications forms that allow the user 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 Applications, 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 e-mail 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 Applications 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

In Oracle Applications, 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 Applications 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 through Oracle Internet Directory 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.

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 Applications before you can use your personal certificate to sign Oracle Workflow notifications. See: Loading Certificates for Digital Signatures, *Oracle Workflow Administrator's Guide*.

   Note: Electronic signatures are currently supported only for the version of Oracle Workflow embedded in Oracle Applications.

Reviewing Notifications via Electronic Mail

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

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

If your e-mail reader can interpret and display HTML-formatting in the body of a message, select 'HTML mail with attachments' or 'HTML mail' as your notification preference. HTML mail can include images and provide direct links to supporting information sources that you may need access to to complete a notification. If you choose 'HTML mail with attachments', the e-mail messages include links to the Notification Detail page as standard attachments. If you choose 'HTML mail', the e-mail messages do not include these standard attachments. If custom attachments have been defined for individual notifications in a process, however, those attachments will still be included.

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

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

An e-mail notification that requires a response maintains an 'Open' status until you respond to the notification. For e-mail notifications that do not require a response, such as FYI (For Your Information) notifications, your workflow administrator determines how the notification status is updated when setting up a notification mailer. Depending on the setup configuration, either Oracle Workflow automatically updates the status

of FYI notifications to 'Closed' after sending you the notifications by e-mail, or those notifications maintain an 'Open' status until you manually close them in the Worklist Web page.

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

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

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

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

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

The format of the NID line is as follows:

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

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

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

1. Your plain text e-mail notification includes information that is helpful for you to respond to the notification. Depending on the notification, the information may appear as references to other sources or as attachments. Some attachments, depending on their content may only be viewable if you display your notification using the Notification web pages. See: Viewing Notifications from a Web Browser, page 3-14.
2. To respond to your notification, use the Reply command in your mail application to reply to the original e-mail notification.
3. Include the response template from the original notification in your reply. In addition to the response prompts, the response template includes the special notification ID and access key that a notification mailer requires to identify the notification you are

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

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

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

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

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

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

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

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

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

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

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

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

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

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

7. If this notification requires a password-based signature or certificate-based digital signature in your response, you cannot respond to the notification through e-mail. 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 3-30.

> **Note:** Electronic signatures are currently supported only for the version of Oracle Workflow embedded in Oracle Applications.

8. If this notification includes sensitive content that cannot be sent in e-mail for security reasons, the notification e-mail 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 3-30.

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

1. Your plain text e-mail notification includes information that is helpful for you to respond to the notification. Depending on the notification, the information may appear as references to other sources or as attachments. Some attachments, depending on their content may only be viewable if you display your notification using the Notification web pages. See: Viewing Notifications from a Web Browser, page 3-14.
2. To respond to your notification, use the Reply command in your mail application to reply to the original e-mail notification.
3. Include the text of the original notification message in your reply. This text contains the special notification ID and access key that a notification mailer requires to identify the notification you are responding to.
4. Follow the syntax instructions in the notification message carefully when formatting your reply. The response values must be within the first lines of your reply, where each line represents a separate response value.

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

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

   If a response prompt provides a default response value, you can accept the default value by leaving the appropriate response line blank.
5. When you are satisfied with your response, use the Send command of the mail application to send your reply.

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

6. If this notification requires a password-based signature or certificate-based digital signature in your response, you cannot respond to the notification through e-mail. 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 3-30.

> **Note:** Electronic signatures are currently supported only for the version of Oracle Workflow embedded in Oracle Applications.

7. If this notification includes sensitive content that cannot be sent in e-mail for security reasons, the notification e-mail 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 3-30.

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-1998

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."

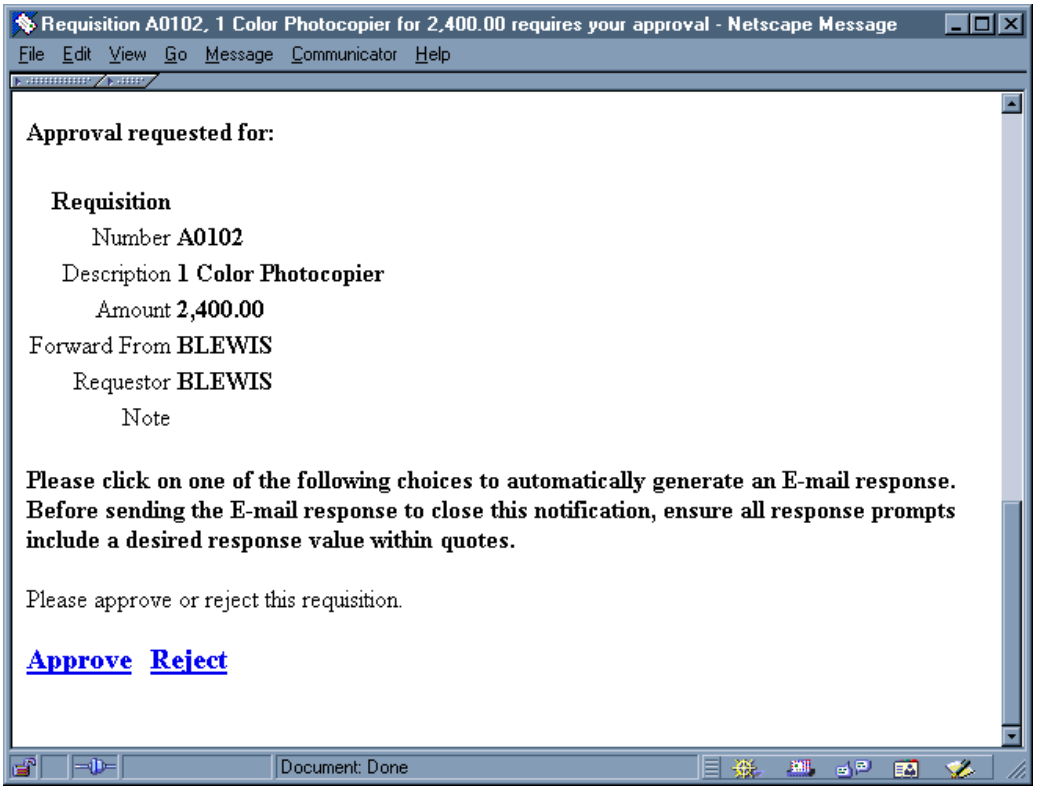
01-JAN-1998

1000.00

To Respond to an HTML E-mail Notification:

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

HTML E-mail Notification



Important: If your notification preference is 'HTML Mail with attachments', an HTML-formatted e-mail notification always includes one standard attachment. The attachment is called Notification Detail Link and it provides a direct link to your notification in the Notification Details web page.

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

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 3-20 or To View the Details of a Notification (for Oracle Applications), page 3-30.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

> **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 e-mail notification. See: #HIDE_MOREINFO Attribute, *Oracle Workflow Developer's Guide*.

7. If another user sent you this notification with a request for more information, click the response link and enter the information you want to provide between the quotes (' ') following the response prompt. When you are satisfied with your response, use the Send command of the mail application to send your reply.
8. If this notification requires a password-based signature or certificate-based digital signature in your response, you cannot respond to the notification through e-mail. 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 3-30.

   > **Note:** Electronic signatures are currently supported only for the version of Oracle Workflow embedded in Oracle Applications.

9. If this notification includes sensitive content that cannot be sent in e-mail for security reasons, the notification e-mail 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 3-30.

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

1. Your plain text e-mail notification with attachments includes information that is helpful for you to respond to the notification. Depending on the notification, the information may appear inline in the message body, as links to other reference sources or as attachments to the message. In addition, the notification always includes at least two attachments:
   - HTML Message Body-an HTML-formatted version of the notification message.
   - Notification Detail Link-a direct link to your notification displayed in the Notification Details web page.
2. When you are done reviewing all the information for the notification, you can respond to the notification in one of three ways:
   - Use your mail reader's Reply command to respond, following the instructions in the plain text message body. See: To Respond to a Plain Text E-mail Notification Using Templated Response, page 3-4 and To Respond to a Plain Text E-mail Notification Using Direct Response, page 3-6.
   - Display the HTML Message Body attachment and respond by selecting one of the response links at the bottom of the HTML message body. See: To Respond to an HTML E-mail Notification, page 3-8.

- Choose the Notification Detail Link attachment to display the Notification Details web page. See: To View the Details of a Notification, page 3-20 or To View the Details of a Notification (for Oracle Applications), page 3-30.

  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 e-mail. 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 3-30.

   Note: Electronic signatures are currently supported only for the version of Oracle Workflow embedded in Oracle Applications.

4. If this notification includes sensitive content that cannot be sent in e-mail for security reasons, the notification e-mail 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 3-30.

To Reassign a Notification to Another User:

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

Important: When you forward a notification to another user via e-mail, you are simply asking that user to respond to the notification on your behalf. Note that you still maintain ownership of the notification. If you want to transfer the notification and ownership of the notification to another user, you can only do so from the Notifications web pages. See: Viewing Notifications from a Web Browser, page 3-14.

Related Topics

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

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

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

Plain Text E-mail with an HTML Attachment, *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 e-mail message if your notification preference is set to 'Plain text summary mail' in the User Preferences web page, or, for Oracle Applications only, if your notification preference is set to 'HTML summary mail'. You can receive a plain text e-mail notification summary using any e-mail reader. To receive an HTML e-mail notification summary, you must be using Oracle Workflow embedded in Oracle Applications, and your e-mail reader must be able to 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.*

In standalone Oracle Workflow, the plain text e-mail notification summary is based on the Workflow Summary Mail template defined in the System: Mailer item type. The standard summary identifies the recipient, notification ID, subject, priority and due date of each notification. It also indicates that if you wish to view the details of a notification or respond to or close the notification, you should use the Worklist Web page.

In Oracle Applications, the plain text and HTML-formatted versions of the e-mail 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 for Standalone Oracle Workflow, page 3-14

Viewing Notifications from a Web Browser for Oracle Applications, page 3-26

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 for Standalone Oracle Workflow

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

Note: For information about the Worklist pages in Oracle Applications, see: Viewing Notifications from a Web Browser for Oracle Applications, page 3-26.

To Access Notifications from a Web Browser:

1. You can access your worklist in one of several ways.
   - To navigate directly to your current worklist of open notifications, enter:

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

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

     Replace the bracketed italicized text in these URLs as follows:

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

     `<webagent>/wfa_html.find`
   - You can also navigate to the Notifications Worklist or Find Notifications web pages from the Oracle Workflow home page. See: Accessing the Oracle Workflow Home Page, page 2-1.
2. If you are accessing any of the Oracle Workflow URLs for the first time in your web browser session, you will be prompted for a valid username and password to log on.
3. Enter your username and password.
4. Choose OK. If you have made an error, you can clear the values and start over.

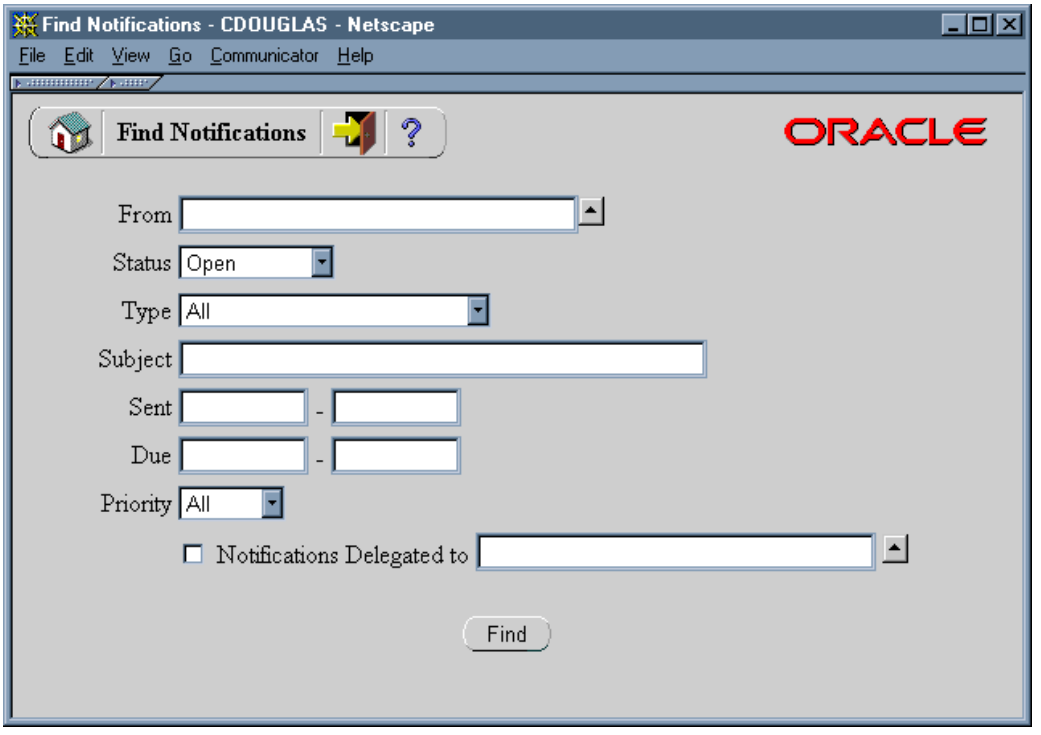
   If you used the `wfa_html.worklist` URL, skip to the Notification Worklist section, page 3-18.

To Find Notifications:

1. The Find Notifications window lets you enter search criteria to locate specific notifications. If you are logged on to the current session as a regular workflow user, you can specify criteria to search for any notification(s) you own. The search criteria are:

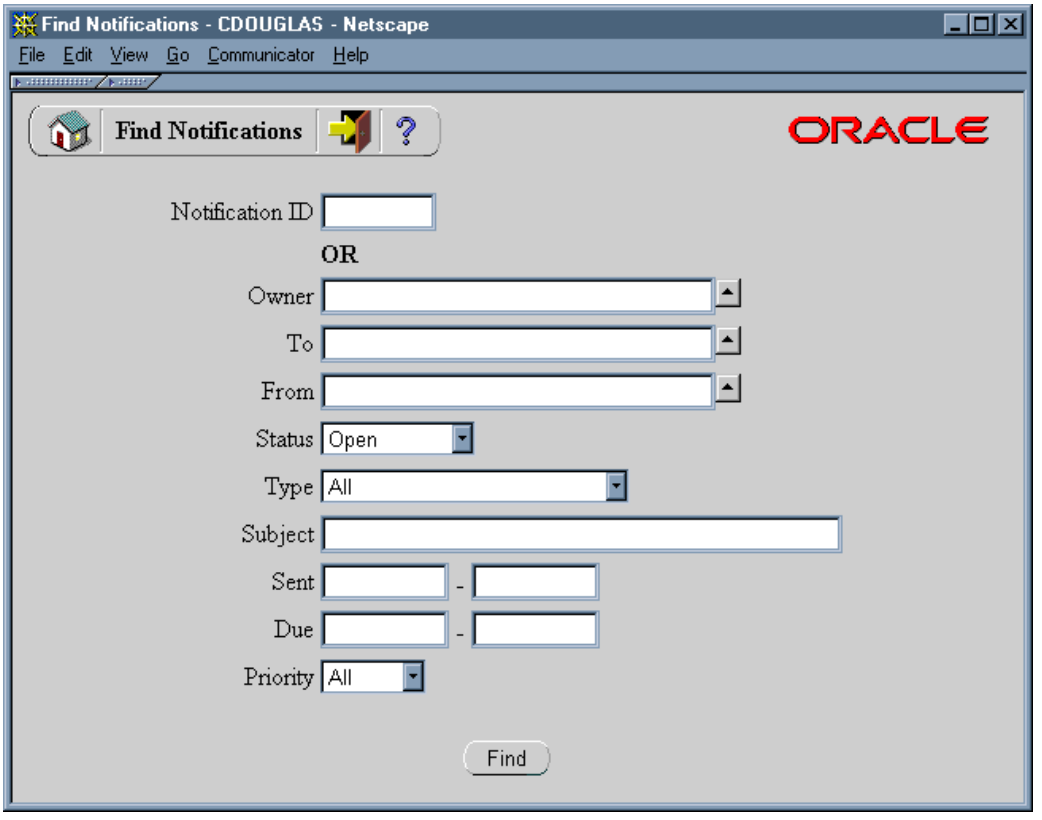
   - From - enter a role to search for all notifications from that role. The From role for a notification is determined by the #FROM_ROLE message attribute. See: #FROM_ROLE Attribute, *Oracle Workflow Developer's Guide*.
   - Status - choose a notification status of Canceled, Closed, Invalid Reply, or Open. Choose All to display notifications of any status.
   - Type - choose the item type of the notification(s). Choose All to display notifications of any item type.
   - Subject - enter the subject of the notification you wish to search for. This field accepts case insensitive text strings and interprets the percent sign (%) as a wildcard.
   - Sent - enter the date or range of dates from which the notification(s) were sent. Use the default date format of your database.
   - Due - enter the date or range of dates by which the notification(s) should be completed. Use the default date format of your database.
   - Priority - choose High, Normal or Low as the priority of the notification(s) you wish to find or choose All to display notifications of any priority.
   - Notifications Delegated to - check this criterion to search for notifications that you have forwarded to a specified role but yet still own. Click on the adjacent field's up arrow icon to display a list of roles from which to choose. See: Using a List of Values, page 3-21.

Find Notifications Page for Users



2. As a user with workflow administrator privileges, you can also search for notifications that you do not own. See: Setting Global User Preferences, *Oracle Workflow Administrator's Guide*.

Find Notifications Page for Administrators



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

- Notification ID-enter a specific notification ID. Note that if you specify a notification ID, all other search criteria are ignored.
- Owner-enter a role to identify all notifications owned by that role. Click on the field's up arrow icon to display a list of roles from which to choose. See: Using a List of Values, page 3-21.
- To-enter a role to identify all notifications sent to that role. Click on the field's up arrow icon to display a list of roles from which to choose. See: Using a List of Values, page 3-21.

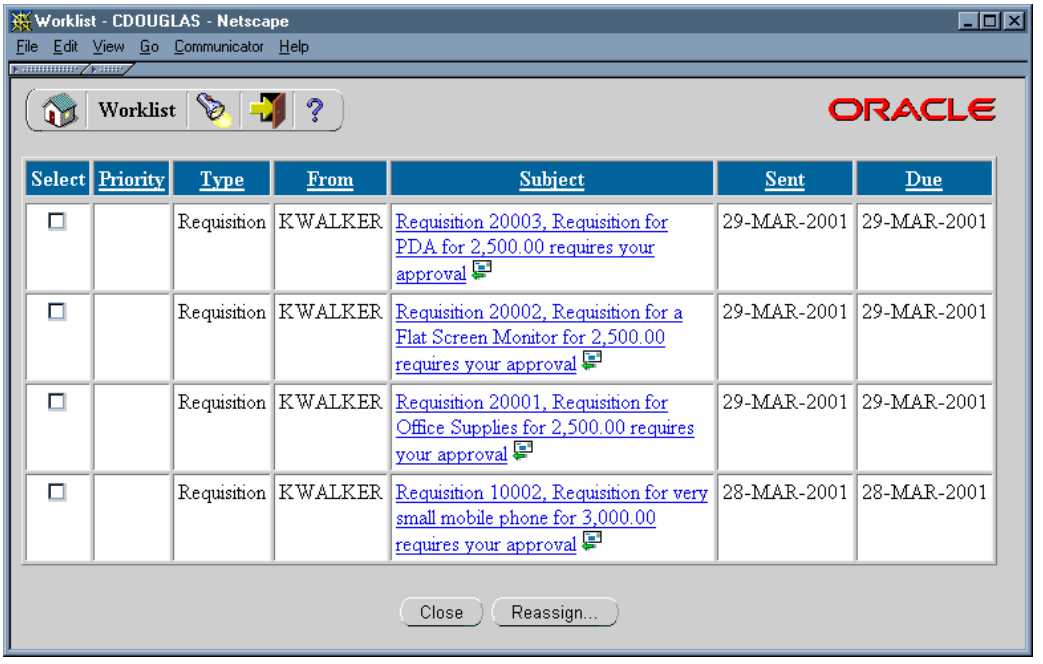
  Note: To identify notifications where the original owner delegated the work to another role (without transferring ownership), specify different roles in the Owner and To fields. This combination of criteria is equivalent to selecting the "Notifications Delegated to" criterion in the standard Find Notifications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

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

To View Notifications from the Worklist:

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

Worklist



The Worklist displays the following information for each notification:

- Priority-a high or low priority icon represents the urgency of the notification.
- Type-the item type with which the workflow process and notification is associated.
- From-the role from which the notification was sent. The From role for a notification is determined by the #FROM_ROLE message attribute. See: #FROM_ROLE Attribute, *Oracle Workflow Developer's Guide*.
- Subject-a description of the notification.

  Note: If a notification is Open and requires a response, a Response Required icon appears next to its Subject link.

- Sent-date when the notification was delivered.
- Due-date by which the notification should be completed.

2. Click on any column heading to sort your notifications by that column in ascending order.
3. A Find icon in the toolbar lets you navigate back to the Find Notifications screen at any time so you can use search criteria to reduce the Worklist to a smaller subset of notifications.
4. The Worklist lets you simultaneously close multiple FYI-type notifications that do not require a response. Simply check Select for the each FYI-type notification you wish to close, and then choose Close.
5. You can also collectively reassign a group of notifications. Check Select for the notifications you wish to reassign, then choose Reassign... A Reassign

page appears that lets you specify to whom and how you wish to reassign the notification(s). See: To Reassign a Notification to Another User, page 3-21.

6. You can navigate to the full details of any notification and act on the notification by clicking on the notification's Subject link.

To View the Details of a Notification:

1. In the Detail Notification page, the full details of the notification appear in the upper frame, and the response section of the notification appears in the lower frame. You can scroll through or resize these frames.
2. The upper frame may include inline images as well as links embedded in the message body to additional information sources for the notification. A reference URL link opens another Web browser window and connects to a specified URL.
3. The upper frame may also include attachment icons that appear after the message body. These icons also link to additional information sources for the notification. A notification can include the following 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.
4. The Response section may look as follows:
   - If a notification requires a response, but none of the responses affect the result of the notification activity, the response prompts all appear as fields and/or poplists. When you are done entering your response values, submit your response by choosing the Submit button.
   - If a notification requires a response, and one of the responses becomes the result of the notification activity, then that determining response will appear last as a set of buttons to choose from as shown in the figure above. The buttons represent the possible choices to the response prompt. All other response prompts, if any, appear as fields or poplists above that prompt. When you choose a button for that last response prompt, you also submit your response for the notification.
   - If a notification does not require a response, the response section indicates that. Choose Close in the Response section to close the notification so that it does not appear in your notification summary list the next time you query for open notifications.

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

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

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

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

To Reassign a Notification to Another User:

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

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

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

   Note: If you clicked on the Reassign button in the Response frame of a specific notification, you do not see a summary of selected notifications.

3. In the 'Reassign to' field, click on the up-arrow icon to display a window that lets you search for a list of roles to choose from. See: Using a List of Values, page 3-21.
4. After choosing a role, specify how you wish to reassign the notification. Select 'Delegate Authority for Responding to Notifications' if you want to give someone else authority to respond to the notification on your behalf. With this option, Oracle Workflow maintains that you own the notification. Or select 'Transfer Ownership of Notifications', if you want to give someone else complete ownership and responsibility of the notification.
5. Enter any comments you want to pass along to the new role. Choose Reassign. Once the notification is reassigned, the web browser returns you to your Worklist page, where the reassigned notification is no longer in your worklist.

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

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

Using a List of Values:

1. For a field that supports a list of values, click on the field's up-arrow icon to display a list of values window.

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

Defining Rules for Automatic Notification Processing for Standalone Oracle Workflow

Use Oracle Workflow Automatic Notification Processing to automatically forward your notifications to another role or respond to incoming notifications with a predefined response when you are not available to manage your notifications directly, such as when you are on vacation.

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

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

ROLE = <*role*> and:

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

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

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

> **Note:** For information about the vacation rule pages for Oracle Workflow embedded in Oracle Applications, see: To View and Maintain Vacation Rules, page 3-36.

To Define a Rule for Automatic Notification Processing:

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

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

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

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

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

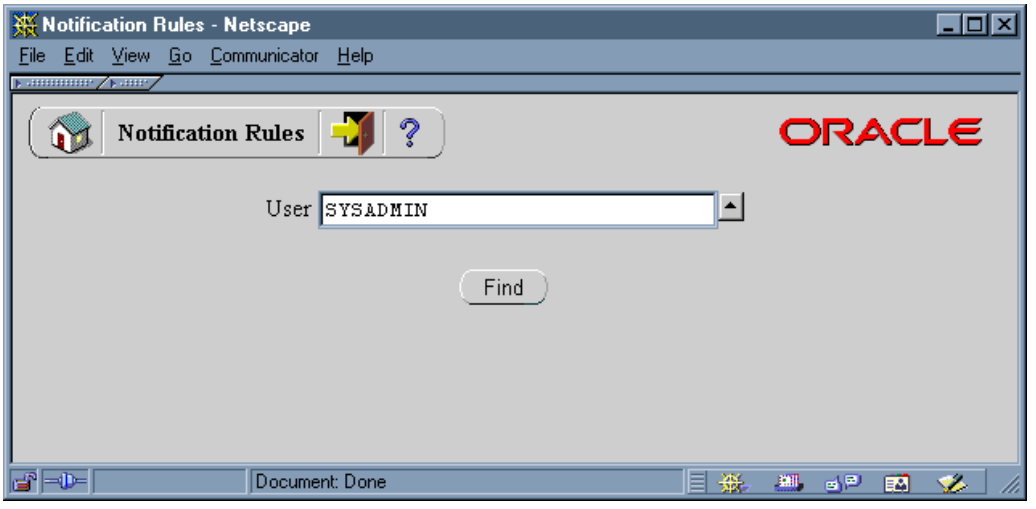
- *<webagent>* represents the base URL of the web agent configured for Oracle Workflow in your Web server. See: Setting Global User Preferences, *Oracle Workflow Administrator's Guide*.
- *<rolename>* represents an internal role name that you want to query routing rules for. Note, however, that you can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

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

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

Enter the user ID of a role and choose Find.

Notification Rules Page (Find)

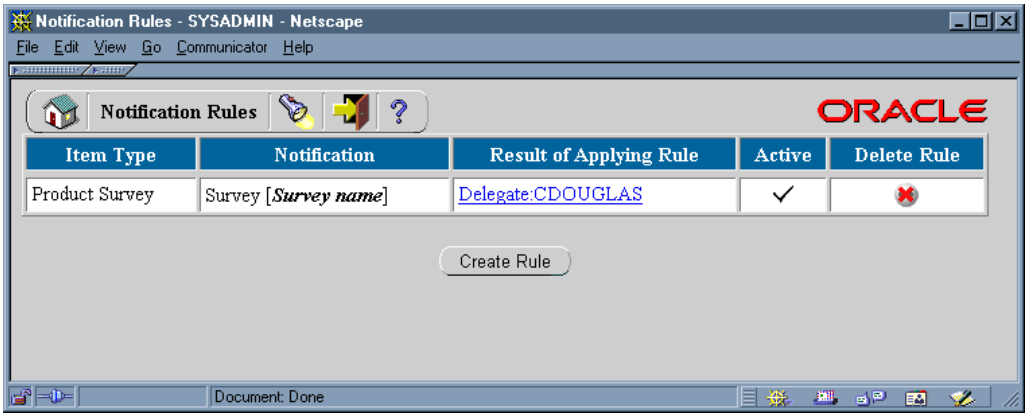


Important: Both of these URLs access secured pages, so if you have not yet logged on as valid user in the current web session, you will be prompted to do so before the page appears.

Note: You can also access the Notification Rules web page from the Oracle Workflow home page. See: Accessing the Oracle Workflow Home Page, page 2-1.

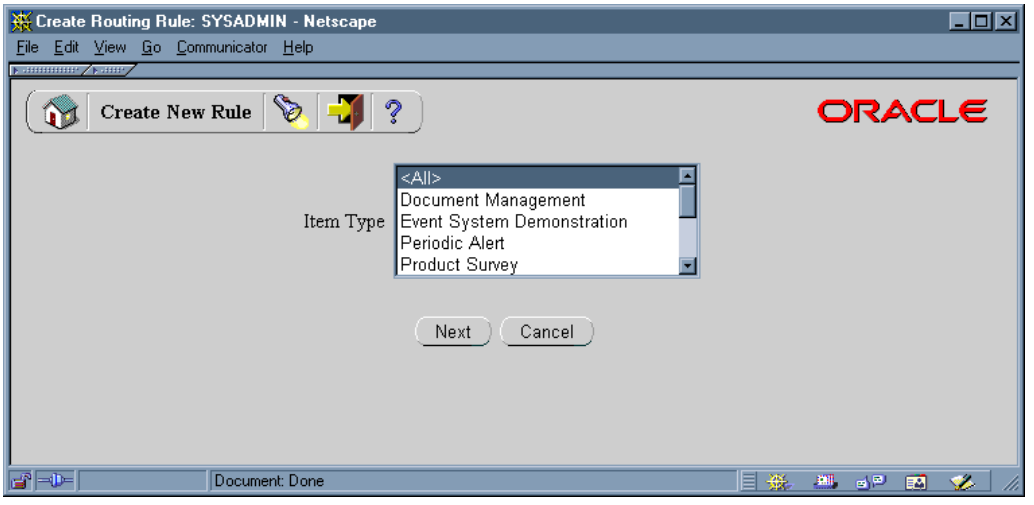
2. The Notification Rules page for the role appears, listing all existing rules for the current role. Choose Create Rule.

Notification Rules Page (List)



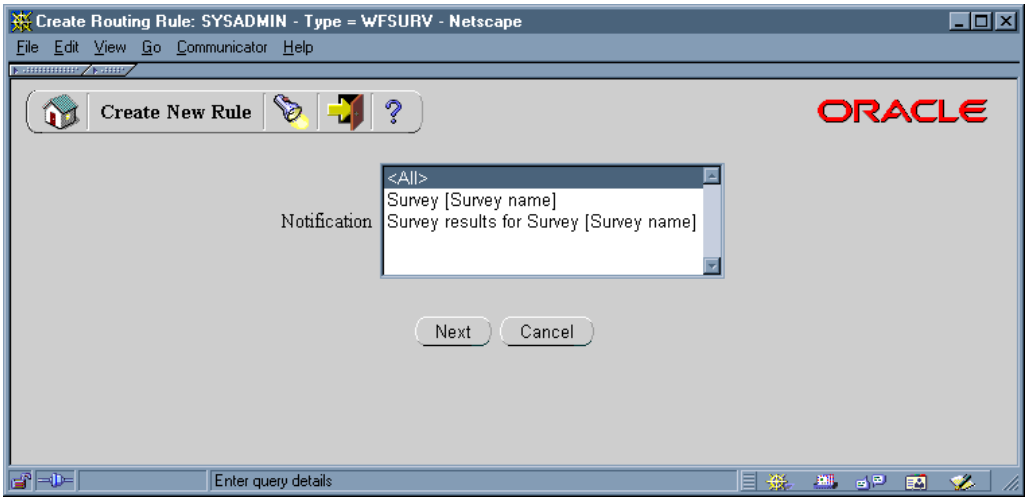
3. In the Item Type poplist field, select the item type to which this rule applies or select <All> if you want this rule to apply to notifications associated with any item type.

Create New Rule Page (Item Type)



4. Choose Next to proceed or choose Cancel if you want to cancel this rule and return to the previous page.
5. If you selected <All> as the item type to apply the rule to, then skip to step 8, page 3-25. If you selected a specific item type, then proceed to the next step to choose a notification from that item type to which you want your rule to apply.
6. In the Notification field, select the notification message to which this rule applies or select <All> if you want this rule to apply to all notifications in the item type.

Create New Rule Page (Notification)



7. Choose Next to proceed or choose Cancel if you want to cancel this rule and return to the previous page.

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

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

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

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

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

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

    - "Reassign to"-forward the notification to a designated role.
    - "Respond"-respond to the message with a set of predefined response values.
    - "Deliver Notifications to me, regardless of any general rules"-leave the notification in the your inbox and do nothing. You can define a rule with this

action to exclude a certain subset of notifications from a more encompassing rule. For example, suppose you have a rule that forwards all your notification messages to another role, but you want to exclude a subset of notifications from that rule. To accomplish this, you can define a new rule that applies only to that subset of notifications, whose action is to 'Deliver Notifications to me,...'.

12. If your rule action is "Reassign to", click on the up-arrow icon to display a window that lets you search for a role to reassign to. See: Using a List of Values, page 3-21.
13. After choosing a role, specify how you wish to reassign the notifications. Select 'Delegate Authority for Responding to Notifications' if you want to give the new role authority to respond to the notification on your behalf. With this option, Oracle Workflow maintains that you still own the notifications, but the recipient role of the notifications is now the role that you are reassigning your notifications to. Select 'Transfer Ownership of Notifications', if you want to give the new role complete ownership and responsibility of the notification.

    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.

14. If your rule action is "Respond", set the values that you want to automatically respond with.
15. Choose OK to save this rule and return to the Notification Rules page to display an updated list of your role's routing rules. You can also choose Cancel at any time if you want to cancel this rule and return to the previous page.

To Update or Delete an Automatic Notification Processing Rule:

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

   `<webagent>/wf_route.list`

   `<webagent>` represents the base URL of the web agent configured for Oracle Workflow in your Web server. See: Setting Global User Preferences, *Oracle Workflow Administrator's Guide*.
2. The Automatic Notification Processing page for the role appears. In the "Result of Applying Rule" column, click on the rule you wish to update.
3. In the Modify Rule page make your changes to the rule and choose OK to save your changes.

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

Viewing Notifications from a Web Browser for Oracle Applications

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.

> **Note:** For information about the Worklist pages in standalone Oracle Workflow, see: Viewing Notifications from a Web Browser for Standalone Oracle Workflow, page 3-14.

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 Advanced Worklist 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.

The worklist access feature lets you allow another user to handle your notifications without giving that user access to any other privileges or responsibilities that you have in Oracle Applications. 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, you can switch the Advanced Worklist to display 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 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 special logic in the workflow, such as an expense report that you submitted to the other user for approval.

You cannot define vacation rules for the user whose worklist you are viewing. You also cannot grant access to that user's worklist to anyone else.

> **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. However, with worklist access, you can reassign the notification to yourself so that you can access the notification through your own worklist and respond directly.

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.
2. To specify which notifications to display in the Worklist, select the type of notifications you want from the View pull-down menu and select Go. You can choose to view:
   - Open Notifications
   - FYI Notifications
   - To Do Notifications
   - All Notifications
   - Notifications From Me
3. The Advanced Worklist shows the following information for each notification:
   - From-the role from which the notification was sent. This column is displayed when you view notifications sent to you.
   - To-the role to which the notification was sent. This column is displayed when you view notifications sent from you.
   - Type-display name of the item type to which the workflow process that sent the notification belongs.
   - Subject-a description of the notification.
   - Sent-date when the notification was delivered.
   - Due-date by which the notification should be completed.

- Status-open, closed, or canceled status of the notification. This column is displayed when you view all notifications.
- 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. 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 3-32 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. See: #HIDE_REASSIGN Attribute, *Oracle Workflow Developer's Guide*.

5. You can navigate to the full details of any notification and act on the notification by clicking on the notification's Subject link or by selecting the notification and then choosing Open.
6. To define vacation rules, select the Vacation Rules link. See: To View and Maintain Vacation Rules, page 3-36.
7. To grant access to your worklist to another user, select the Worklist Access link. See: To Grant Access to Your Worklist, page 3-35.
8. To view another user's worklist, select the Switch User button. The Switch User page displays the user whose worklist you were previously viewing and the list of users whose worklists you can access. Select the user whose worklist you want to view.

   > **Note:** If a user has an e-mail address defined in Oracle Applications, you can select the address link in the Email column to send e-mail to that user.
   >
   > 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 define vacation rules for that user or grant access to that user's worklist to anyone else. The Vacation Rules link and the Worklist Access link apply only to your own worklist, even if you are viewing another user's notifications.

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.

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 Applications, non-structured data such as images, spreadsheets, or video can be linked to structured application data, including Oracle Workflow notifications. If a notification includes such Oracle Applications attachments, the notification header displays an Attachment(s) heading with links to the attachments. Select a link to view the attached data. See: Attachments, *Oracle Applications User's Guide* and Attachments Table, *Oracle Self-Service Web Applications online help*.

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

     Note: You must use a responsibility with the appropriate security to open a linked form or Oracle Applications 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 Applications 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 check box. Otherwise, Oracle Workflow displays the Worklist after you respond to a notification.

6. Use the Response section to act on the notification.
   - If a notification requires a response, but none of the responses affect the result of the notification activity, the response prompts all appear as fields or pull-down menus. After you finish entering your response values, submit your response by choosing the Submit button. After you submit your response, the status of the notification changes to Closed.
   - If a notification requires a response, and one of the responses becomes the result of the notification activity, then that determining response will appear last. All other response prompts, if any, appear as fields or pull-down menus before that prompt.
     - If there are four or fewer possible result values for the final response prompt, those values appear as a set of buttons. After you finish entering your response values for any other response prompts, choose the button for the result value you want. When you choose one of these buttons, you also submit your response to the notification.
     - If there are more than four result values to choose from for the final response prompt, those values appear in a pull-down menu with a Submit button. After you finish entering your response values for any other response prompts, select the result value you want from the pull-down menu and submit your response by choosing the Submit button.

     After you submit your response, the status of the notification changes to Closed.
   - If you launch the Notification Worklist from Oracle Applications, your Response section may display an attached form icon that lets you drill down to an Oracle Applications form to complete your response.
   - If 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 3-32 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. 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 3-34.

> **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 user who made the request and the request details. Enter the information you want to provide in the Response field and choose the Submit button to submit your response.

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

> **Note:** If your site has implemented single sign-on through Oracle Internet Directory 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. 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 Applications 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, 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 are restricted in this way, Oracle Workflow displays an error message when you select the Reassign, Delegate, or Transfer button. In this case you should deselect the restricted notifications before performing the reassignment. See: #HIDE_REASSIGN Attribute, *Oracle Workflow Developer's Guide*.

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. 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 Embedded in Oracle Applications, *Oracle Workflow Administrator's Guide*.

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

4. 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*.

5. 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 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.
   - 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 Embedded in Oracle Applications, *Oracle Workflow Administrator's Guide*.

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.

To Grant Access to Your Worklist:

1. Navigate to the Worklist Access page by navigating to the Advanced Worklist and selecting the Worklist Access link.

   The start and end dates for each user determine the access period when the user can view and act on your worklist. The user's active or inactive status depends on whether the current date is within the access period.

   > **Note:** If a user has an e-mail address defined in Oracle Applications, you can select the link in the User Name column to send e-mail to that user.

2. To grant access to another user, choose the Grant Worklist Access button.
   - Select the user you want, and enter an optional description.
   - Specify the start date when the user can begin accessing your worklist. You can optionally also specify an end date after which the user will no longer have access, or leave the end date blank to grant access indefinitely.
3. To update the start and end dates of a user's access period, select the Update icon for that user and enter your changes.
4. To delete a user from the list, select the Delete icon for that user. The user will no longer have access to your worklist, even if the user's access status was previously Active.

   > **Note:** When you delete a user, the record of the user's access no longer appears in your Worklist Access page. If you want to keep this record for reference, you can simply set the end date to end the user's access, rather than deleting the user.

Related Topics

Viewing Notifications from the Personal Worklist, page 3-38

Vacation Rules for Oracle Applications

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 simpy delivers the notifications to your worklist. See: #HIDE_REASSIGN Attribute, *Oracle Workflow Developer's Guide*.

- Respond to the notification with a predefined response, or close a notification that does not require a response
- 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 executing any further forwarding rules, marking the notification as being in error.

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 3-36.
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 3-36.

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 Vacation Rule 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 choose a notification in 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.

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

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

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

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 3-40.
3. To specify which notifications to display in the Worklist, select the type of notifications you want from the View pull-down menu and select Go. Oracle Workflow provides the following preconfigured views:
   - All Notifications
   - FYI Notifications
   - Notifications From Me
   - Open Notifications
   - To Do Notifications

   You can also create your own personalized views to display notifications that match criteria that you specify. To maintain your personalized views, select the Personalize button. See: To View and Maintain Personal Worklist Views, page 3-43.

   The views that are available may also depend on the responsibility through which you access the Personal Worklist.
4. The Personal Worklist shows the following information for each notification:
   - From-the role from which the notification was sent. This column is displayed when you view notifications sent to you.
   - To-the role to which the notification was sent. This column is displayed when you view notifications sent from you.
   - Type-display name of the item type to which the workflow process that sent the notification belongs.
   - Subject-a description of the notification.
   - Sent-date when the notification was delivered.
   - Due-date by which the notification should be completed.
   - Status-open, closed, or canceled status of the notification. This column is displayed when you view all notifications.

   Select the From, To, Type, Subject, Sent, Due, or Status column heading to sort the list by that column. By default, the list is sorted by sent date from most recent to oldest, and then by subject in alphabetical order.
5. To collectively reassign a group of notifications, select the notifications you want and select the Reassign button. See: To Reassign a Notification to Another User, page 3-32.

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

6. You can navigate to the full details of any notification and act on the notification by clicking on the notification's Subject link or by selecting the notification and then choosing Open. See: To View the Details of a Notification, page 3-30.
7. To define vacation rules, select the Vacation Rules link. See: To View and Maintain Vacation Rules, page 3-36.

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:
   - From - the role from which the notification was sent.
   - Type - display name of the item type to which the workflow process that sent the notification belongs.
   - Subject - a description of the notification.
   - Sent - date when the notification was delivered.
   - Due - date by which the notification should be completed.
   - Status - open, closed, or canceled status of the notification.

   Select the From, Type, Subject, Sent, Due, or Status column heading to sort the list by that column. By default, the list is sorted by sent date from most recent to oldest and then by subject in alphabetical order.
5. To collectively reassign a group of notifications, select the notifications you want and select the Reassign button. See: To Reassign a Notification to Another User, page 3-32.
6. You can navigate to the full details of any notification and act on the notification by clicking on the notification's Subject link or by selecting the notification and then choosing Open. See: To View the Details of a Notification, page 3-30.
7. To define vacation rules, select the Vacation Rules link. See: To View and Maintain Vacation Rules, page 3-36.

8. To save your current search criteria as a personalized view for the worklist, select the Save Search button. See: To Create or Update a Personal Worklist View, page 3-44.
9. 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 3-41.

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 Column pull-down menu and select the Add button.

   > **Note:** You can choose to display more than one search option of the same type if you want to apply several search criteria to the same notification property. For example, if you want to search for notifications that were sent between two particular dates, you can display two Sent search options. Set one option to search for all notifications sent after the first date, and set the other option to search for all notifications sent before the second date. If you choose "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 operator and filter value blank for a search option, that option will not be included in the search.

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

- Subject - Enter the subject line of the notifications.
- From - Enter the role from which the notifications were sent.
- Message Attribute - Enter the value of a message attribute belonging to the notification. Message attributes hold dynamic content that is determined by the specific context in which a notification is sent. For example, a notification in a requisition workflow might have a message attribute for the requisition amount. Message attribute values can be numbers, dates, or text.
- 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` or `no` to specify whether the notifications are sent from you.

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

5. Select the Go button to perform your search. You can also select the Clear button to clear the search option fields and remove any additional search options you added, so that you can enter new search criteria.
6. The Advanced Search page displays the notifications that match your search criteria. For each notification, the list displays the following information:
   - From - the role from which the notification was sent. This column is displayed when you view notifications sent to you.

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

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

7. To collectively reassign a group of notifications, select the notifications you want and select the Reassign button. See: To Reassign a Notification to Another User, page 3-32.
8. You can navigate to the full details of any notification and act on the notification by clicking on the notification's Subject link or by selecting the notification and then choosing Open. See: To View the Details of a Notification, page 3-30.
9. To define vacation rules, select the Vacation Rules link. See: To View and Maintain Vacation Rules, page 3-36.
10. To save your current search criteria as a personalized view for the worklist, select the Save Search button. See: To Create or Update a Personal Worklist View, page 3-44.
11. 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 3-40.

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 you are logged in as, including both preconfigured views provided by Oracle Workflow and your personalized views. For each view, the list displays the view name, description, 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:** The preconfigured views provided by Oracle Workflow 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 3-44.

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

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 the preconfigured views provided by Oracle Workflow.

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 3-44.
6. To create a new view, select the Create View button. See: To Create or Update a Personal Worklist View, page 3-44.

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

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

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

- To add a column to the view, select the column in the Available Columns list and choose the Move button. You can also choose the Move All button to add all available columns.
- To remove a column from the view, select the column in the Columns Displayed list and choose the Remove button. You can also choose the Remove All button to remove all the columns.
- To specify the order in which the columns are displayed, select a column in the Columns Displayed list and use the top, up, down, or bottom arrow buttons to move the column to the position you want in the list.

7. If you want to change the display names for the notification property columns in the view, select the 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 Column pull-down menu and select the Add button.

    > **Note:** You can choose to display more than one search option of the same type if you want to apply several search criteria to the same notification property. For example, if you want to search for notifications that were sent between two particular dates, you can display two Sent search options. Set one option to search for all notifications sent after the first date, and set the other option to search for all notifications sent before the second date. If you choose "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.

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

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

- From - Enter the role from which the notifications were sent.
- Type - Enter the display name of the item type to which the workflow process that sent the notification belongs.
- Subject - Enter the subject line of the notifications.
- Sent - Enter the date when the notifications were delivered, using the date format you chose in your Oracle E-Business Suite general preferences. Select the field's calendar icon to display a calendar from which you can select a date.
- Due - Enter the date by which the notifications should be completed, using the date format you chose in your Oracle E-Business Suite general preferences. Select the field's calendar icon to display a calendar from which you can select a date.
- Status - Enter `open`, `closed`, or `canceled` as the notification status.
- 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.
- To - Enter the role to which the notifications were sent.
- Information Requested From - Enter the role to which notifications that are requests for more information were sent.
- Closed - Enter the date when the notifications were closed or canceled, using the date format you chose in your Oracle E-Business Suite general preferences. Select the field's calendar icon to display a calendar from which you can select a date.
- Priority - Enter `high`, `normal`, or `low` as the notification priority.
- 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` or `no` to specify whether the notifications are sent from you.

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 for Oracle Applications, page 3-26

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 Notification History
- Viewing a Status Diagram
- Viewing Participant Responses
- Viewing Error Information for a Workflow

Monitoring Workflow Processes with the Self-Service Monitor

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

If you have workflow administrator privileges, you can also perform administrative operations within the monitor to control the processing performed for a workflow or handle an error. You can cancel a workflow that you no longer want to run, or you can reassign a notification that you want to send to a different recipient. Workflow administrator privileges are assigned in the 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.

> **Note:** For information about the Workflow Monitor available in standalone Oracle Workflow, see: Workflow Monitor, *Oracle Workflow Administrator's Guide*.

1. Viewing Workflows in the Status Monitor, page 4-2
2. Viewing Notification History, page 4-3
3. Viewing a Status Diagram, page 4-3

4. Viewing Participant Responses, page 4-6
5. Viewing Error Information for a Workflow, page 4-6

Viewing Workflows in the Status Monitor

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

To Search for Workflows in the Status Monitor:

1. Use a web browser to navigate to the self-service Status Monitor, using a responsibility and navigation path specified by your system administrator. When you initially navigate to the Status Monitor, the Workflows page is displayed by default. See: Oracle Workflow User Navigation Paths, page A-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 view comments and other information gathered for closed response-required notifications in a workflow, select the workflow and select the Participant Responses button.

Related Topics

Accessing the Self-Service Monitor, page 4-1

Viewing Notification History

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

- To send e-mail to the recipient of a notification, select the user link in the Notification Recipient column.
- If you have workflow administrator privileges, you can reassign a notification that is not yet complete. Select the notification you want to reassign and select the Reassign button. See: To Reassign a Notification to Another User, page 3-32.

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

Process Title:

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

Process Diagram Window:

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

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

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

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 Participant Responses

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

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

> **Note:** The Participant Responses page lists only closed response-required notifications. To view information-only (FYI) notifications or unanswered response-required notifications, view the complete notification history for the workflow. See: Viewing Notification History, page 4-3.

Viewing Notification Response Details:

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

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

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

Related Topics

Accessing the Self-Service Monitor, page 4-1

Viewing Error Information for a Workflow

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

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

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

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

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

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 Applications.

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 Applications. 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 2-6	Workflow User Web Applications: Home *or* Workflow User Web (New): Home
Advanced Worklist, page 3-28	Workflow User Web Applications: Advanced Worklist *or* Workflow User Web Applications: Notifications *or* Workflow User Web (New): Notifications *or* Workflow Administrator Web Applications: Notifications *or* Workflow Administrator Event Manager: Notifications *or* Workflow Administrator Web (New): Notifications
Self-Service Status Monitor, page 4-1	Workflow User Web Applications: Status Monitor *or* Workflow User Web (New): Status Monitor

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

B

Oracle Workflow User Personalizations

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

This appendix covers the following topics:

- Oracle Workflow User Personalizations

Oracle Workflow User Personalizations

Oracle Applications 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, please refer to Oracle*MetaLink* note 268969.1, *Oracle Applications 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 Applications component that manages the queuing of requests and the operation of concurrent programs.

Concurrent Process

An instance of running a non-interactive, data-dependent function, simultaneously with online operations. Each time you submit a request, a concurrent manager processes your request, starts a concurrent process, and runs a concurrent program.

Concurrent Program

A concurrent program is an executable file that performs a specific task, such as posting a journal entry or generating a report.

Concurrent Queue

A list of concurrent requests awaiting completion by a concurrent manager. Each concurrent manager has a queue of requests waiting in line to be run. If your system administrator sets up your Oracle Application to have simultaneous queuing, your request can wait to run in more than one queue.

Directory Services

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

Event

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

Event Activity

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

Event Data

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

Event Key

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

Event Message

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

Event Subscription

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

External Functions

Programs that are executed outside of the Oracle Database.

External Java Functions

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

Function

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

Function Activity

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

Generic Service Component Framework

A facility that helps to simplify and automate the management of background Java services.

Item

A specific process, document, or transaction that is managed by a workflow process.

Item Attribute

See Item Type Attribute.

Item Type

A grouping of all items of a particular category that share the same set of item attributes. Item type is also used as a high level grouping for processes.

Item Type Attribute

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

Lookup Code

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

Lookup Type

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

Message

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

Message Attribute

A variable that you define for a particular message to either provide information or prompt for a response when the message is sent in a notification. You can use a 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 e-mail notifications to users through a mail application, and processes e-mail responses.

Notification Worklist

A Web page that you can access to query and respond to workflow notifications.

Performer

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

Process

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

Process Definition

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

Process Activity

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

Protection Level

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

Result Code

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

Result Type

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

Result Value

The value returned by a completed activity.

Role

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

Service Component Container

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

Service Component

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

Subscription

See Event Subscription.

System

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

Timeout

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

Transition

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

Workflow Definitions Loader

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

Workflow Engine

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

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