

ORACLE WORKFLOW



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AGENDA

- Objective
- What is Workflow
- Oracle Workflow components
- Standard Workflow example « Requisition Approval Process »
- Oracle Workflow as user / administrator
- Custom or modified Workflow
- Question & Answers

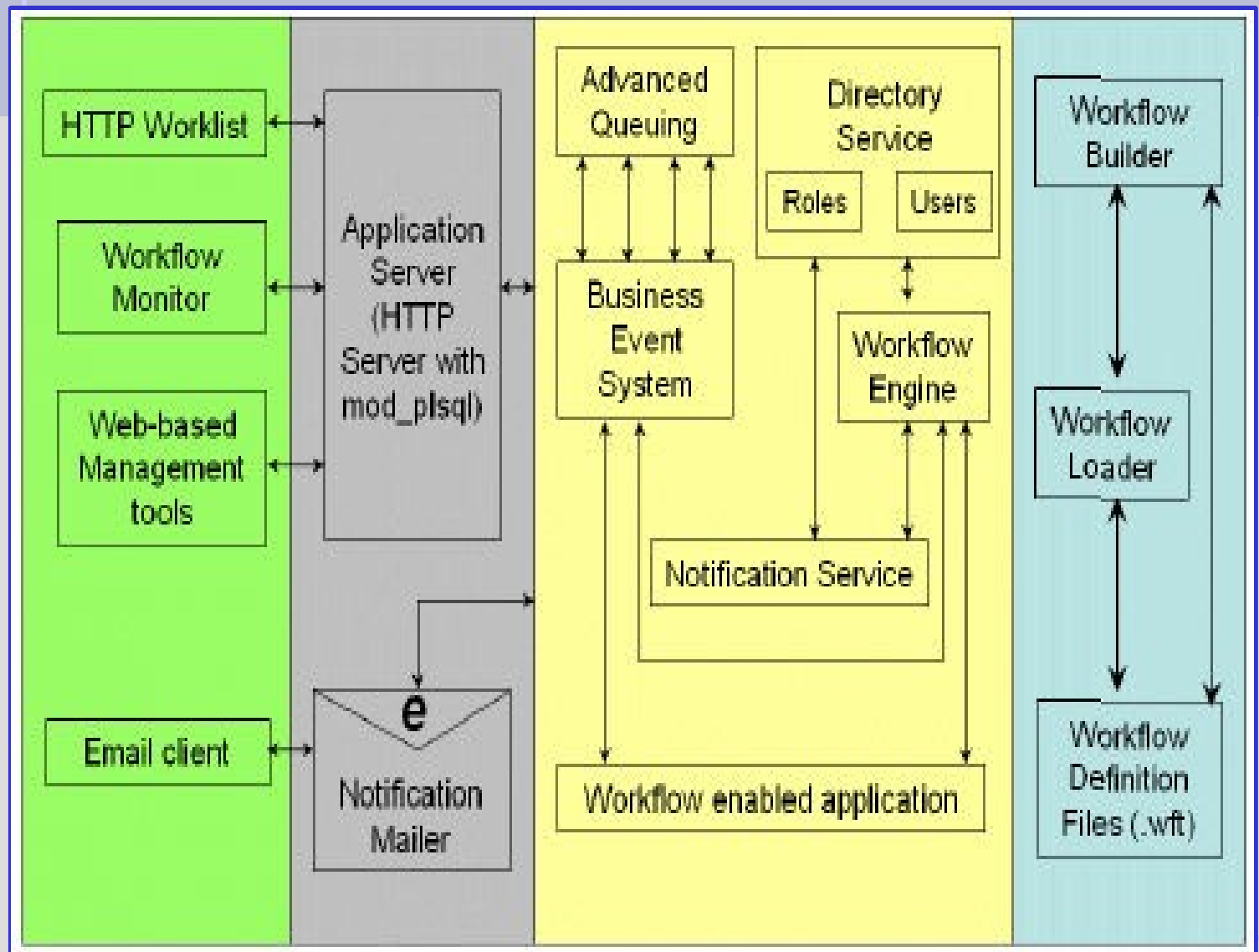
Objective

- Know what Workflow is
- Understand how Oracle Workflow components work
- Tell to eBusiness Suite users Oracle Workflow capabilities
- Learn how to administer Workflow process
- Learn how to create or modify Workflow

What is Workflow

- Design and automation of all the tasks to accomplish and people involved in a business process.
- Notification upon concurrent request completion since release 11.03
- Oracle Workflow (2.6.3) is part of eBusiness Suite (11.5.9 / 11.5.10) and becomes the foundation for most processes
- Account Generator Workflow Process
- PO Requisition Approval process
- AP Invoice Approval Process
- All Oracle Receivables activities can be included in one Workflow

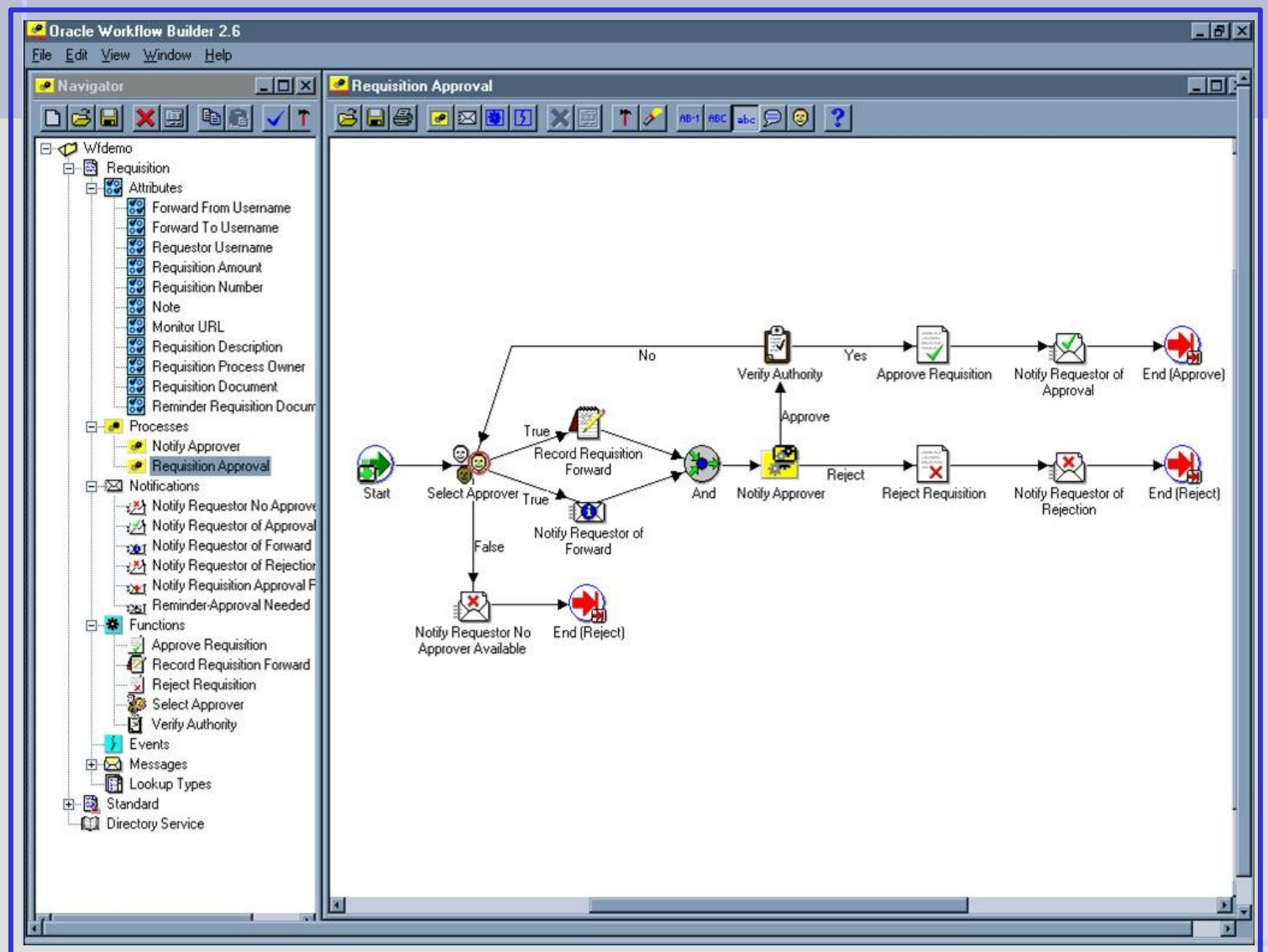
Oracle Workflow Components



Oracle Workflow Components

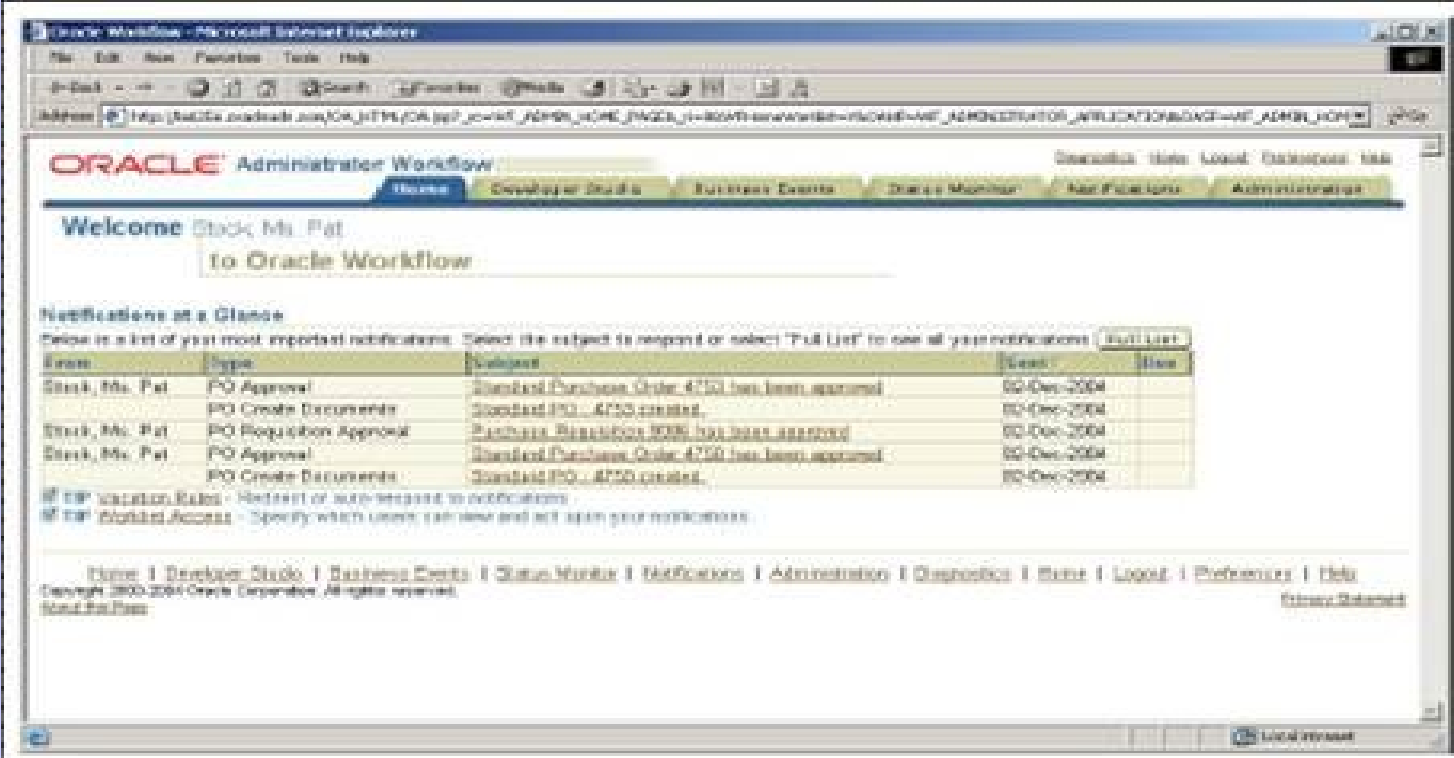
- Workflow Engine: Executes rules and activities of a process
- Workflow Builder: To create or modify a process
- Workflow Monitor: To monitor or administer Workflow processes
- Workflow Notification Service: Sends notifications outside the database
- Business Event System: To communicate business events between systems

Example: Requisition Workflow Approval



User mode

- Read / Reply to notifications (eBusiness Suite or email)
- Access to forms application or URL from notification, spreadsheet document...



The screenshot displays the Oracle Administrator Workflow interface. The main heading is "Welcome Stack, Ms. Pat to Oracle Workflow". Below this, there is a section titled "Notifications at a Glance" which includes a table of notifications. The table has columns for "From", "Type", "Subject", "Date", and "View".

From	Type	Subject	Date	View
Stack, Ms. Pat	PO Approval	Standard Purchase Order 4750 has been approved	02-Dec-2004	
	PO Create Documents	Standard PO - 4750 created	02-Dec-2004	
Stack, Ms. Pat	PO Requisition Approval	Business Requisition 3006 has been approved	02-Dec-2004	
Stack, Ms. Pat	PO Approval	Standard Purchase Order 4750 has been approved	02-Dec-2004	
	PO Create Documents	Standard PO - 4750 created	02-Dec-2004	

Below the table, there are two checkboxes: "If I'm a Supplier/Role - Restrict or auto-respond to notifications" and "If I'm a Global Access - Specify which users can view and act upon your notifications".

At the bottom of the interface, there is a navigation bar with links: Home | Developer Studio | Business Events | Status Monitor | Notifications | Administration | Diagnostics | Help | Logout | Preferences | Help. The footer includes "Copyright 2002-2004 Oracle Corporation. All rights reserved." and "Stack, Ms. Pat".

User mode

- Define vacation rules
- Fix some potential issues

ORACLE Workflow

[Preferences](#) [Help](#)

[Worklist](#) >

Unable to reserve Purchase Requisition 20002543

[Forward](#) [Send Back To Preparer](#) [Try Override](#) [Try Reserving Again](#) [Reassign](#) [Request In](#)

To: [REDACTED]
Sent: 09-06-2006 15:29:04
ID: 86584

Unable To Reserve Purchase Requisition 20002543.

Reason for Reserve failure is:

Line #1 Distribution #1 The accounting date is not in an open encumbrance period. Line #2 Distribution #1 The accounting date is not in an open encumbrance period. Line #3 Distribution #1 The accounting date is not in an open encumbrance period. Line #4 Distribution #1 The accounting date is not in an open encumbrance period.

You can take one of the following actions:

1. You may try to override funds reservation failure from this notification (Please note that override will succeed if allowed by the Budgetary Control Setup)
2. Fix the problem with the requisition or the budgetary controls and try reserving again from this notification
3. Forward this requisition to a person that has the authority to reserve.
4. Return the document to the preparer so that they can make the necessary adjustments and then submit for approval again.

Administrator mode

- Breakdown (search for the instance, activity history, status diagram, participant responses) and resumption of Workflow in error or suspended

ORACLE Administrator Workflow Home Logout Preferences Help Personalize Page

Home Developer Studio Business Events **Status Monitor** Notifications Administration

Status Monitor >

Monitor Search


[Personalize "Workflows"](#)

Workflows


[Search](#)

[Personalize "Search"](#)

Select "Show More Search Options" to search for workflows by activity characteristics.

Workflow Type 

Type Internal Name
(Example: WFDemo, WfError)

Workflow Owned By 

Item Key

User Key

* Workflow Status

* Workflow Started

[Show More Search Options](#)

[Personalize "Results"](#)

Results: Workflows

[Personalize "Workflow Monitor Results Text"](#)

To view or administer a workflow, select "Activity History". Select "Participant Responses" to view comments and other information gathered for closed, response-required notifications.

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

[Personalize "Workflow Information List"](#)

Select Workflow and View... Activity History Status Diagram Participant Responses Workflow Details Previous 1-25 Next 25

Select	Status	Workflow Type	Item Key	User Key	Owned By	Started	Completed	Child Workflows
<input checked="" type="radio"/>	Active	PO Requisition Approval	13075-81196		[REDACTED]	12-Jun-2006 16:02:30		
<input type="radio"/>	Active	PO Requisition Approval	13074-81192		[REDACTED]	07-Jun-2006 17:51:42		
<input type="radio"/>	Active	PO Requisition Approval	13073-81191		[REDACTED]	07-Jun-2006 17:31:07		
<input type="radio"/>	Active	PO Requisition	12374-81190		[REDACTED]	07-Jun-2006		

Administrator mode

ORACLE Administrator Workflow Home Logout Preferences Help Personalize Page

Home Developer Studio Business Events **Status Monitor** Notifications Administration

Status Monitor > Monitor Search >

Monitor Activities History

Activity History: REQAPPRV, 13075-81196

Workflow Type **PO Requisition Approval** Started **12-Jun-2006 16:02:30**

Status **Active** Completed

[Personalize "Search"](#)

Search

Set activity filters and select the "Go" button to view corresponding results.

[Personalize "Workflow Mon Hist Filter Rqn"](#)

Activity Type Response Notifications Activity Status Active
 FYI Notifications Complete
 Functions and Processes Error
 Standard Workflow Suspended
 Events

Results: Activities

[Personalize "Results: Activities"](#)

TIP You can administer an activity only if it's still in process.

[Personalize "History Details"](#)

Select Activity and... Previous 1-10 Next 10

Select	Status	Activity	Parent Activity	Performer	Started	Completed	Activity Result	Reassign	Suspend / Resume
<input type="radio"/>	<input checked="" type="radio"/> Notified	Approve Requisition Notification	Notify Approver	[REDACTED]	12-Jun-2006 16:05:19				
<input type="radio"/>	<input checked="" type="radio"/> Complete	Update Action History (Expect Response)	Notify Approver		12-Jun-2006 16:05:19	12-Jun-2006 16:05:19	Activity Performed		
<input type="radio"/>	<input checked="" type="radio"/> Complete	Start	Notify Approver		12-Jun-2006 16:05:19	12-Jun-2006 16:05:19			
<input type="radio"/>	<input checked="" type="radio"/> Active	Notify Approver	Notify Approver Chooser		12-Jun-2006 16:05:19				
<input type="radio"/>	<input checked="" type="radio"/> Complete	Is Forward Action Allowed?	Notify Approver		12-Jun-2006	12-Jun-2006	Yes		

- Cancellation, Suspension, Workflow purge
- Administration scripts (\$FND_TOP/sql)

Create or modify Workflow

- For customers “Access level” -> 100, “Allow modifications of customized objects” -> Unchecked, “Preserve customization” and “Lock at this Access level” -> Checked
- WF_LOCAL_ROLES table (for non eBusiness Suite roles or users)
- Function activity (database procedure with 5 parameters predefined as wf_standard.and)
- APIS and predefined activities: WF_ENGINE (StartProcess), WF_STANDARD (Compare), FND_WF_STANDARD (ExecuteConcProgram), WF_EVENT (Raise)
- Load WF: WFLOAD (UPGRADE mode - to load) and FNDLOAD (to translate)

Questions & Answers

