



# Oracle Workflow Use and Administration Made Easier

Karen Brownfield Rolta



Copyright © 2012 Karen Brownfield All Rights Reserved

Any other commercial product names herein are trademark, registered trademarks or service marks of their respective owners.





### About the Speaker

- Oracle Ace
- Over 35 years System Design and Support
- Over 20 years E-Business Suite support
- 14 years Oracle Workflow design and support
- Former OAUG President
- Over 100 presentations at multiple venues
- Co-Author The ABCs of Oracle Workflow for E-Business Suite Release 11i and Release 12





### Agenda

- Overview/Business Benefit
- Workflow Suggestions by Role
- Workflow for End Users
  - Personal Worklist
  - Status Monitor
  - Diagnostic Reports
- Workflow for Super Users
  - Junior Administrator
  - Worklist Access
  - Workflow Related Concurrent Requests





### Agenda

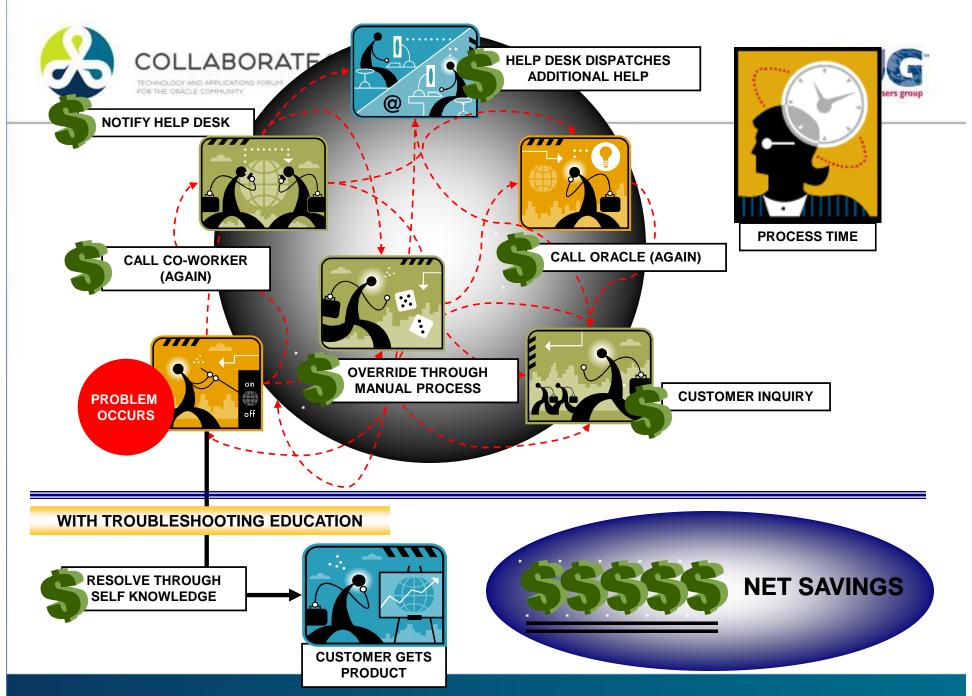
- Workflow for Administrators
  - Oracle Applications Manager
  - Administration Menus
  - Worklist Flexfields
- Workflow for Developers and DBAs
- References and More Presentations





#### Overview

- Presentation covers R12, but....(if still on 11i)
- Workflow Functionality in Release 12 and Release 11i.10 (if patched to RUP7) are nearly identical
  - Forms may look different due to new R12 look-and-feel
- Focus on
  - Efficiency that empowers users
  - Setups that ensure proper operation
  - Administration methods that
    - Prevent trouble
    - Speed recovery when the unexpected happens







## Workflow Troubleshooting by Role

- Workflow End Users
  - Personalize notification page
  - Monitor your own workflows
  - Run Diagnostic Reports for Functional Areas
- Workflow Functional Super Users
  - End User recommendations plus...
  - Run workflow specific concurrent programs
  - Junior Administrator
  - Worklist Access to SYSADMINs emails





## Workflow Troubleshooting by Role

- Workflow Administrators
  - Super User recommendations plus......
  - Worklist Flexfields
  - Troubleshoot all workflows using OAM and Administration Menus
  - Purge
- Workflow Developers/DBAs
  - Setup workflows properly
  - Avoid Cloning issues





## WORKFLOW TROUBLESHOOTING FOR END USERS





### Improved Efficiencies for Users

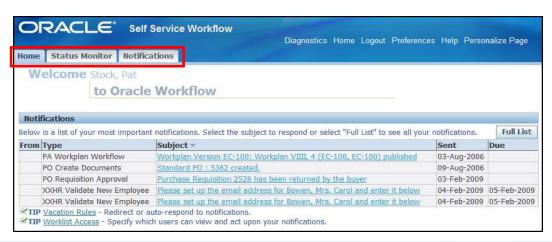
- Provide end users tools for efficiency
  - Add 'Personal Worklist' to menus
  - Provide training for use of the status monitor and other features
  - Set owner attribute in workflows where needed
  - Provide access to diagnostic reports
    - Oracle Diagnostic Tool Responsibility
      - Security is built in you can only access reports related to responsibilities you are assigned





#### Seeded User Menu

- Workflow User Web Applications
  - Advanced Worklist
  - Self Service Workflow
    - Home Page
    - Status Monitor
    - Notifications same as Advanced Worklist

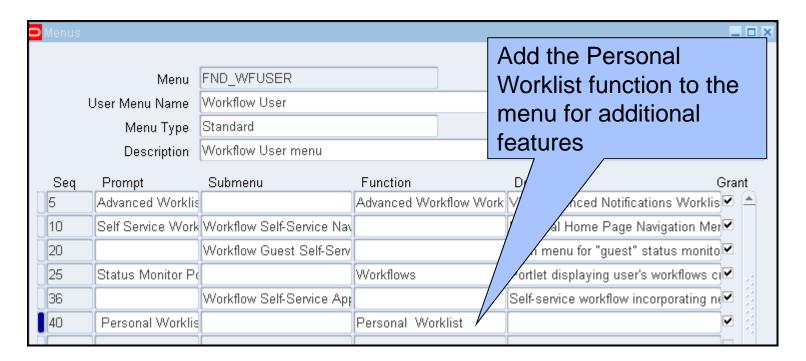






#### Personal Worklist

 Add the function 'Personal Worklist' to the Workflow User menu for additional features

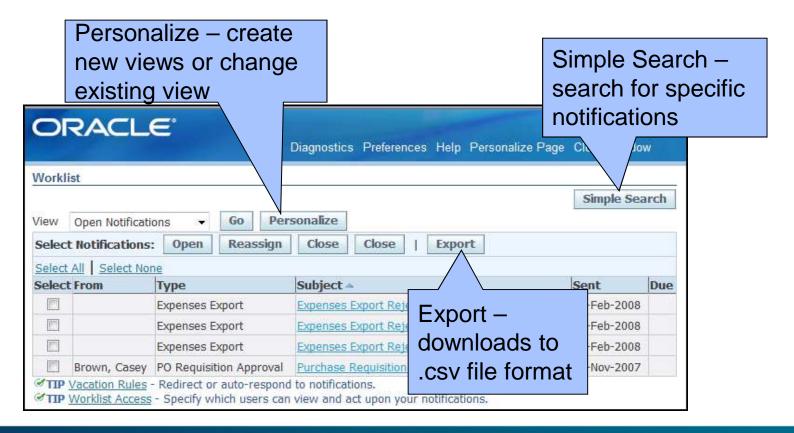






#### Personal Worklist

Personal Worklist additional Features

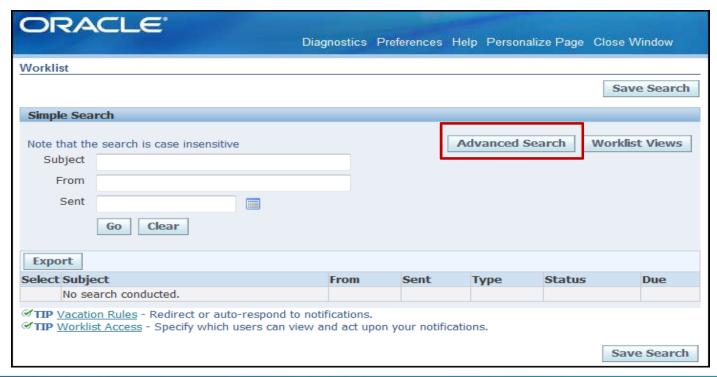






### Personal Worklist Simple Search

 Use Simple Search to search for specific notifications in your worklist

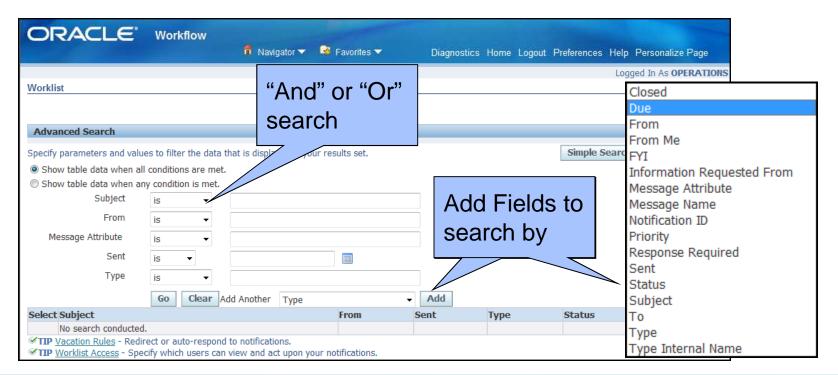






#### Personal Worklist Advanced Search

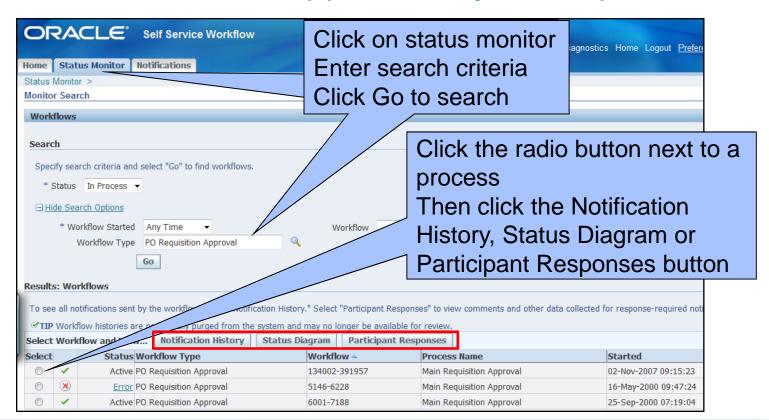
 Or Increase ability to find notifications in your worklist using Advanced Search







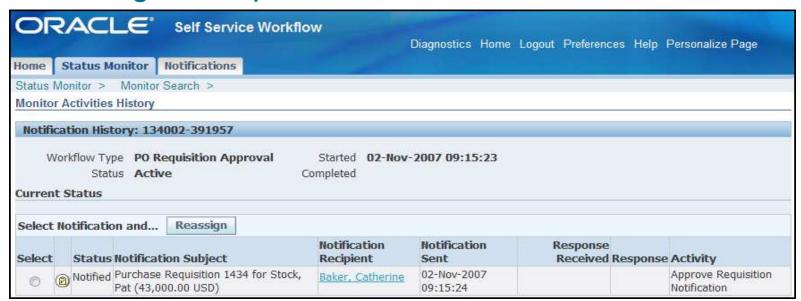
Check the status of approval of your requisitions







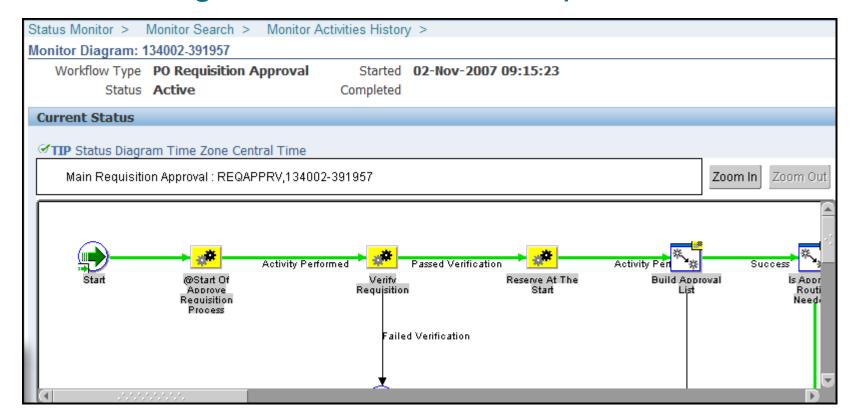
- Notification History Page
  - All notifications sent by the workflow process selected
  - Click recipient name to send an email
  - Reassign if recipient is unavailable







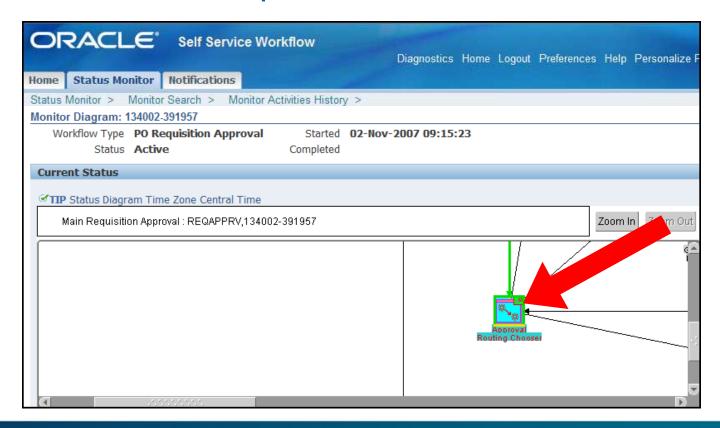
Follow the green line to follow the process







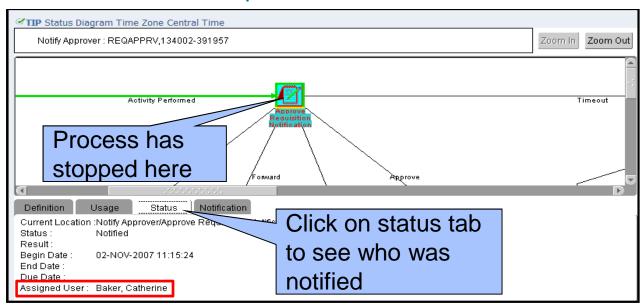
Double click in the process box to drill down







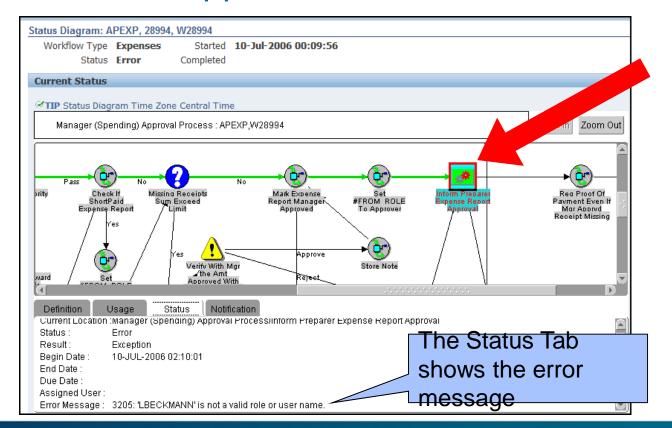
- Tabs below the status monitor provide information about the node
  - Notification has been sent to Catherine Baker
    - Catherine has not responded







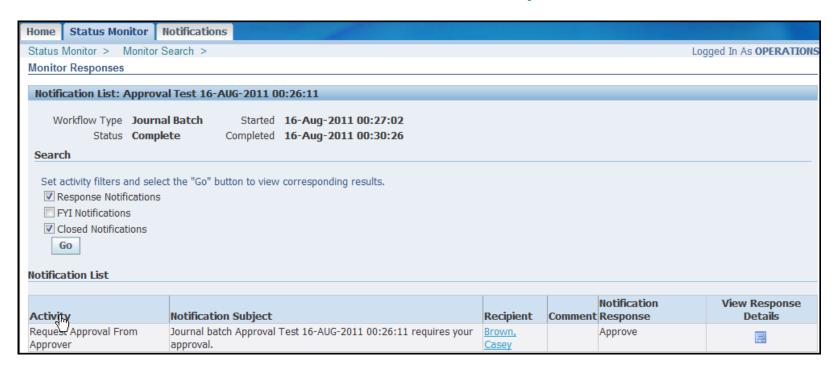
Errored items appear outlined in red







 Participant Responses Tab shows responses to all the notifications for the workflow process selected







## Diagnostic Reports

- Need Oracle Diagnostic Tool Responsibility
  - Starting in 12.0.6, RBAC is utilized for Diagnostics
    - See MOS Note: 753979.1
- Sample of workflow related user tests
  - Other workflow related tests are available

Po Approval	This test collects all the data related to approvals for any purchasing document type.  Use this test whenever a data collection of approvals data is required specific to a document.  Parameters:  Responsiblity, Operating Unit, Document type and document number are required. Release number is only required when collecting workflow data for a release against a blanket or contract agreement. Leave this parameter blank in all other cases.
	To resolve any issues with the execution of this test, please refer to the Diagnostics FAQ.
Account	This diagnostic test will help diagnose issues related to the PO Account Generator for non-OPM
Account Generator	installations. This test is meant for items of type expense and inventory and not shop floor
	To resolve any issues with the execution of this test, please refer to the Diagnostics FAQ.





### Diagnostics

- MOS Note: 1083807.1 shows full catalog for 12.1.3
  - Look for Diagnostics in applications other than workflow

Order/Line Workflow Validation				
Close Ready Headers (without WF)	732137.1	This test lists open order headers that do not have open lines and WF details.	Setup	
Lines In WFERROR/OMERROR	732143.1	This test lists lines that have WFERROR/OMERROR flows, but are no longer in error	Setup	
Lines In <mark>Workflow</mark> Error	732146.1	This diagnostic test shows the summary of order lines that are stuck in Workflow	Setup	
Order Headers Ready To Close	732133.1	This diagnostic test identifies order headers that are ready to be closed.	Setup	
Orphan <mark>Workflow</mark> s	732142.1	This diagnostic test identifies line flows that do not have corresponding order	Setup	
Workflow Status	732147.1	This test prints the detailed information of Header/Line Workflow status	Setup	





## WORKFLOW TROUBLESHOOTING FOR SUPER USERS





#### Junior Administrator

- Allows limited Administration of workflows
  - By workflow Type (up to 10 per grant)
  - By administration action (view, retry, abort, etc)
    - Recommend View and Retry
- Applies only to Status Monitor, does not grant admin rights to events, notifications, etc
- OAUG Conference Paper Database
  - What's New in Workflow: 11iRUP5, RUP6 and R12
    - Includes detail setup instructions for Junior Administrator





#### Worklist Access

- Grant access to SYSADMIN emails
  - Must login as SYSADMIN to create grant



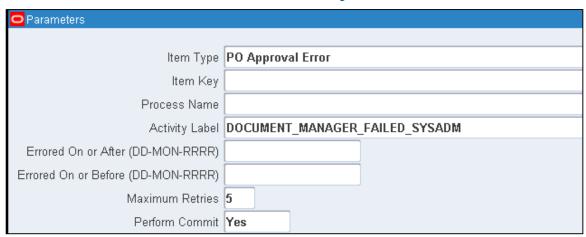
- Use Personal Worklist and Worklist Flexfields to show error message
  - Enable Export button





## Retry Errored Workflows

- Dates based on error date not on original start date
- Perform Commit
  - 'No' = commit at end
  - 'Yes' = commit after each retry

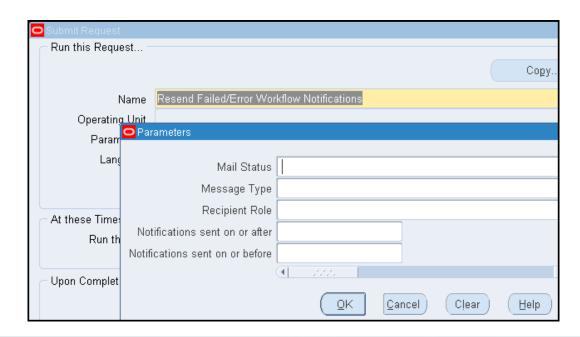






#### Resend Failed/Error Workflow Notifications

- Resend notifications with a mail status of FAILED or ERROR
  - Make corrections first such as email address corrections







#### Resend Failed/Error Workflow Notifications

- Caution
  - You don't always want old notifications to be sent
    - Many workflow systems need cleanup and have orphaned workflows and notifications many years old
  - Consider first a SQL update to WF\_NOTIFICATIONS to set MAIL\_STATUS to null where STATUS = 'CLOSED' or 'CANCELLED'
    - STATUS is the workflow status
    - MAIL\_STATUS is the notification status
  - Refer to the workflow book for more details on cleanup of your workflow system





## WORKFLOW TROUBLESHOOTING FOR ADMINISTRATORS





#### Workflow Administrator

- Set to Responsibility
  - Workflow Administrator Web Applications
- Ensure patches do not reset value
  - AutoConfig parameter s\_wf\_admin\_role
- Add ability to run concurrent requests to menu and create appropriate request group
- Ensure SYSADMIN and user assigned to Mailer have this responsibility





## Workflow Directory Services User/Role Validation

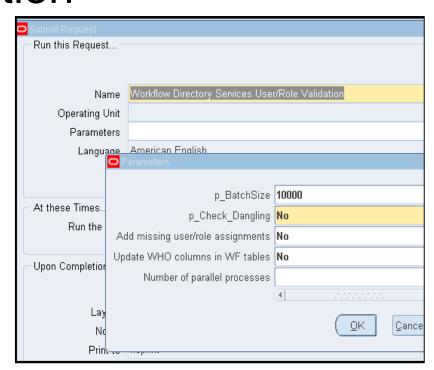
- Symptoms
  - Not receiving notifications
  - Missing responsibilities for users
- MOS Note: 429852.1
  - Follow recommendations based on current release
- MOS Note: 1246824.1
  - Run "Workflow Directory Services User/Role Validation " with argument values as 10000:Yes:Yes:No:Null
  - Run "Synchronize WF Local Tables" with default values





## Workflow Directory Services User/Role Validation

- Run Twice
- 1. Fix Dangling User/Roles
  - Fix Dangling User/Roles=Yes
    - Removes association from WF\_LOCAL\_USER\_ROLES if user or role is missing
  - Add Missing User/Role Assignments=No
- 2. Add Missing User/Role Assignments
  - Fix Dangling User/Roles=No
  - Add Missing User/Role = Yes
    - Adds missing associations in the WF\_LOCAL\_USER\_ROLES to have corresponding user/role assignments in the WF\_USER\_ROLE\_ASSIGNMENTS table







## CRM Workflow Issues Synchronize Workflow Roles

- Symptom
  - Workflow errors with "x' is not a valid role or user name" error message
- Resource Manager enables group and Team members to receive Workflow notifications
  - This program synchronizes all attributes and records in the workflow wf\_local\_\* tables with the mismatching records in Resource manager





#### Preferences

- Users can change the notification type preference via the preferences button
- Remove preferences button by setting profile option General Preferences Show Flag to No
- Changing global preference does NOT override preferences set individually







#### Incorrect Preferences Cause Problems

- If users are not getting emails or emails display incorrectly, check the email style in the preferences
  - If users choose summary email styles, the summary email notification must be scheduled in the mailer setup







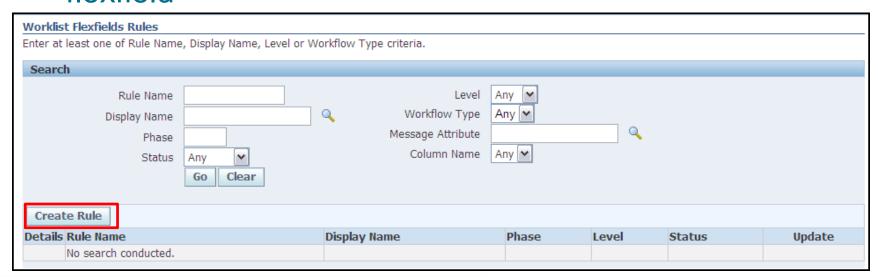
### Worklist Flexfields

- Allows display of attributes from message body in the notification worklist
  - Allows value to be seen without having to open the notification
  - Only Available Using Personal Worklist
- Specific to particular workflow therefore best used when creating special view for that workflow
- What's great about this?
  - Create personal worklist view to separate notifications by type
    - PO Approval more important than Invoice Approval so respond to these first
  - Create personal worklist view to see error messages





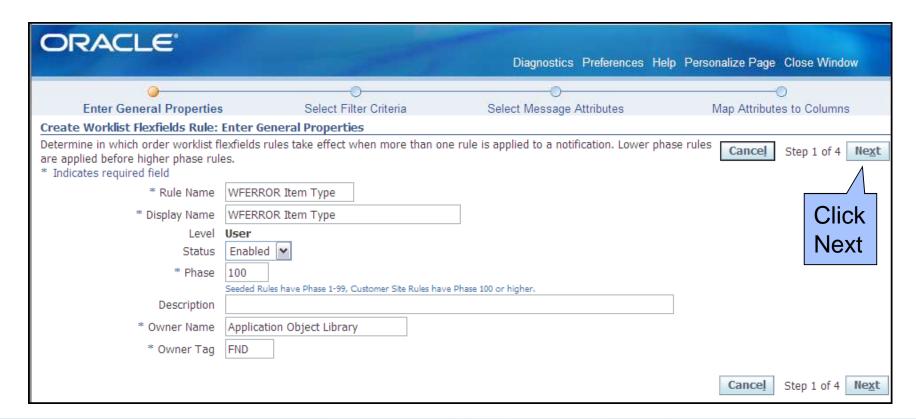
- Example Add the error text to the worklist
  - Workflow Administer creates flexfield rules
    - End Users can access the flexfields created
  - Click Create Rule to assign message attribute to flexfield







Name the rule and leave other attributes as shown







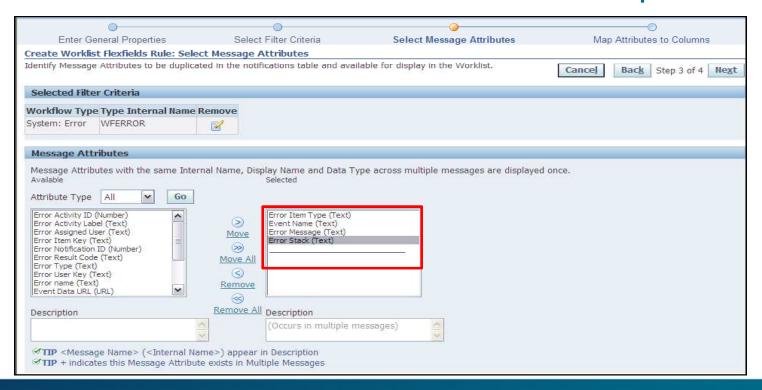
Select the System: Error workflow using display name







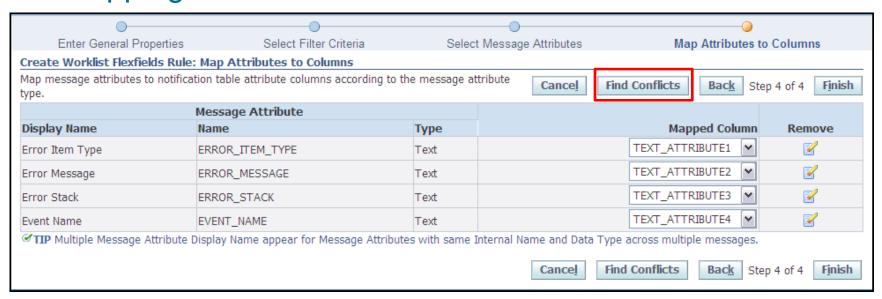
 Select the message attributes you want to add to the worklist for the workflow chosen in step 2







- Map the message attributes to a mapped column based on data type (Text, date, etc...)
  - Click the Find Conflicts button to confirm no duplicate mappings

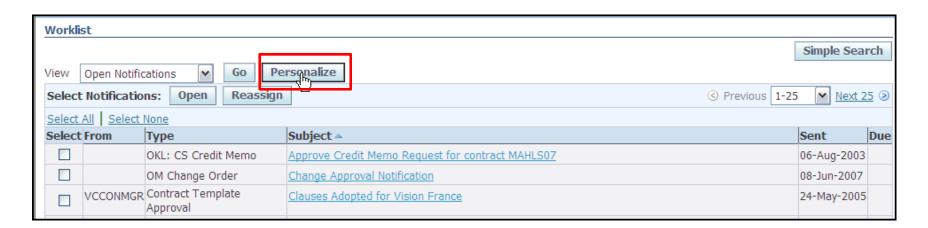






# Worklist Flexfields - Create Personal Worklist View

Use the Personalize button to create a new view







# Worklist Flexfields - Create Personal Worklist View

- Click the Rename
   Columns button to
   assign a name to the
   attributes created
  - This will be the column name on the worklist

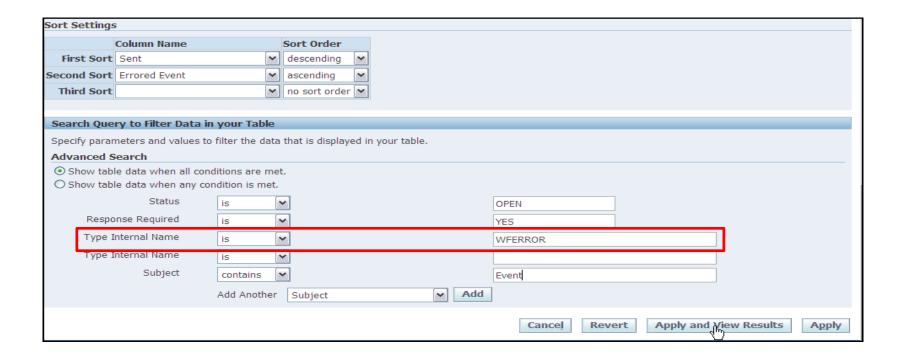
Original Column Name	New Column Name	Show Total
Subject	Subject	
From	From	
Sent	Sent	
Туре	Туре	
Status	Status	
То	То	
Information Requested From	Information Requested From	
Due	Due	
Closed	Closed	
Priority	Priority	
Notification ID	Notification ID	
From Me	From Me	
Message Name	Message Name	
Type Internal Name	Type Internal Name	
Text_Attribute1	Errored Workflows	
Text_Attribute2	Error Message	
Text Attribute3	Error Stack	





# Worklist Flexfields - Create Personal Worklist View

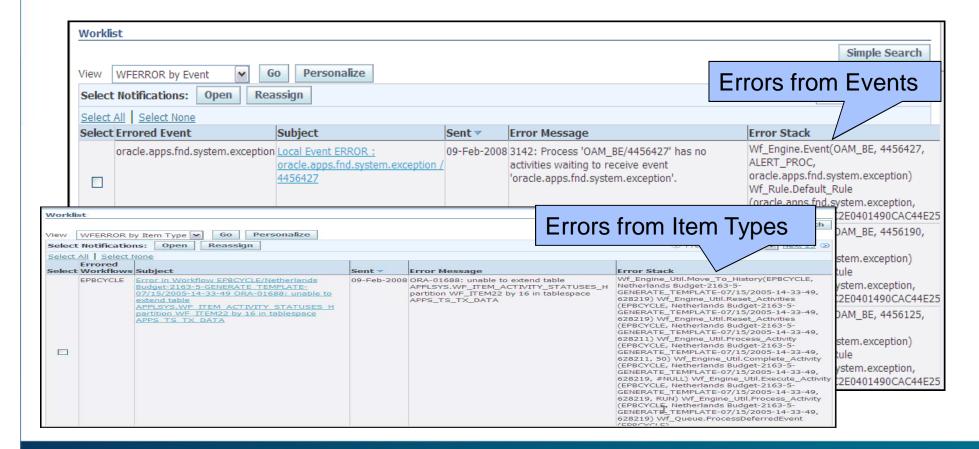
Limit the search to WFERROR workflows







# Worklist Flexfields - Sample Views for WFERROR







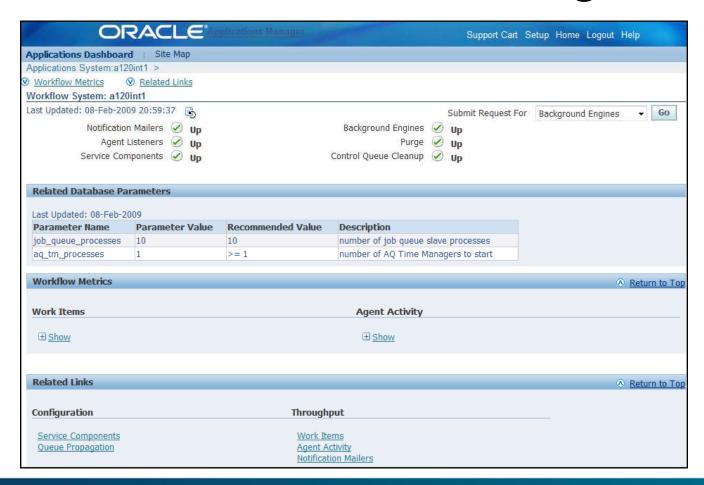
# OAM vs Workflow Administration

- OAM Workflow Page
  - Use to monitor the workflow system as a whole
  - Research all errors
    - Drill down to workflow type and process
  - Set up mailer
  - Monitor Agents and Queues
- Workflow Administration Menus
  - Troubleshoot specific errors
  - Troubleshoot specific notifications





# OAM – Workflow Page

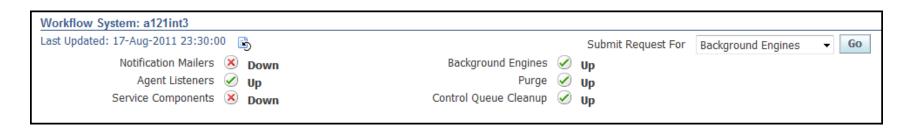






# **OAM Dashboard**

- Notification mailer will not show if notification mailer is not activated
  - Notifications still appear in worklist
- All other icons should be green
  - Background Engines, Purge and Control Queue
     Cleanup show if concurrent requests scheduled
  - If Mailer is down, Service Components will be , must click to check if issues with other listeners

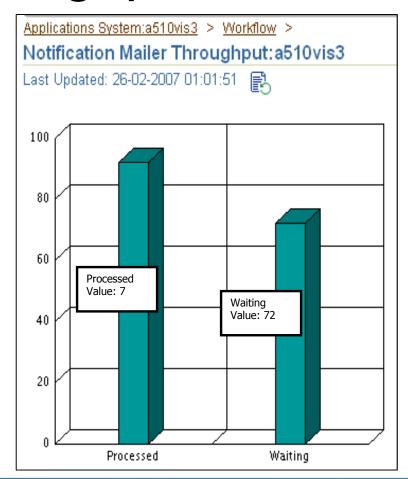






# OAM — Throughput

- If mailer is down, notifications waiting will continue to grow
  - Common in cloned environments
  - See workflow book for proper cloning steps
- Processed
  - STATUS = OPEN
  - MAIL STATUS = SENT
- Waiting
  - MAIL\_STATUS = MAIL

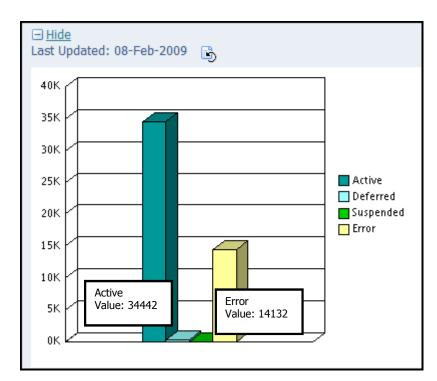






# OAM – Work Items

- Hovering mouse over bar yields exact count
  - Active includes errored processes
- Click on bar to drill down
  - Drill down also available by clicking on (or X) next to Purge in dashboard section and selecting view

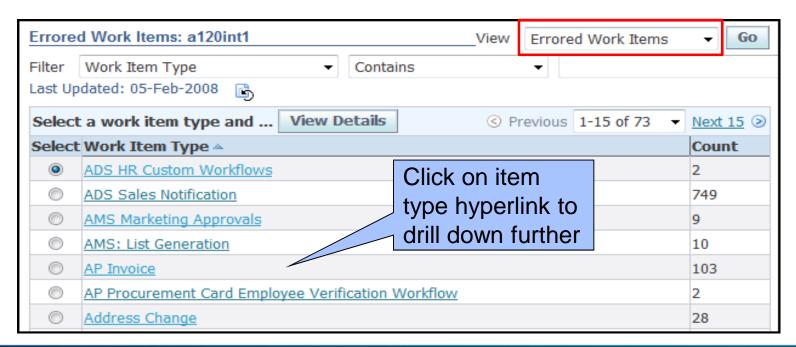








- Shows errored work items by item type
  - Workflow types with high error counts most likely indicate a problem in the process







# Tips – Refresh Button

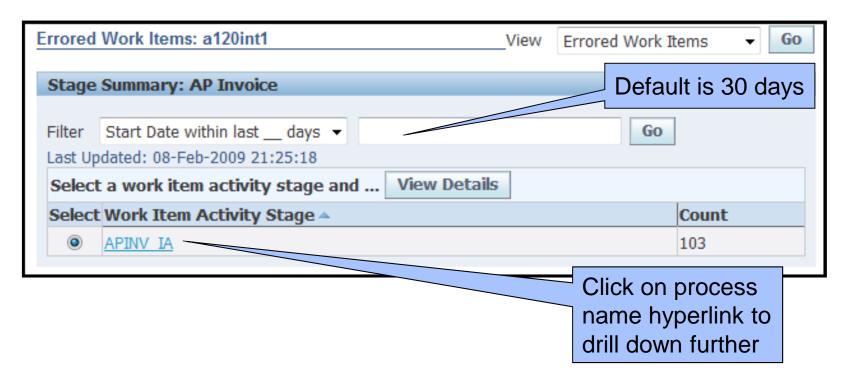
- OAM forms do not perform new queries (unless refresh button is pressed)
  - Schedule the following programs for refresh
    - Workflow Agent Activity Statistics concurrent Program
    - Workflow Mailer Statistics Concurrent Program
    - Workflow Work items Statistics Concurrent Program







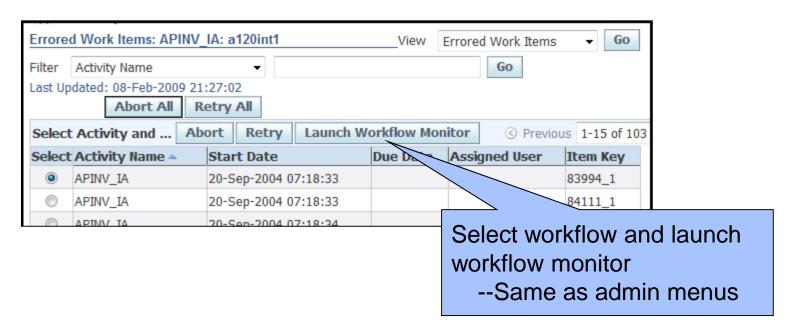
Shows process in error for item type





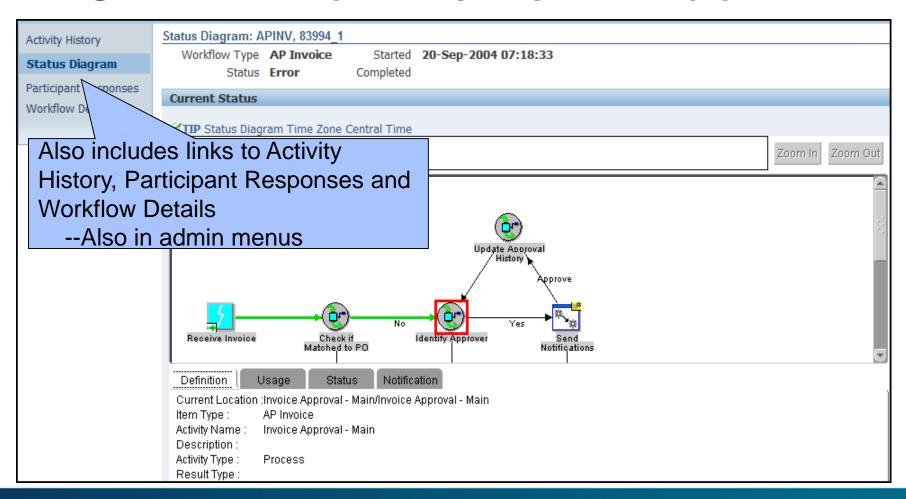


- Shows specific workflows in error for specific process
  - Abort All and Retry All buttons unique to OAM





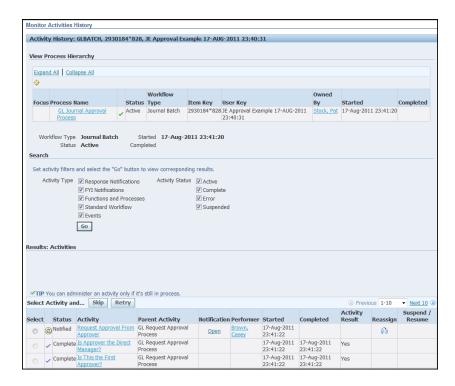








# **Activity History Link**



Click notification status link to view and respond (if Open) to notification

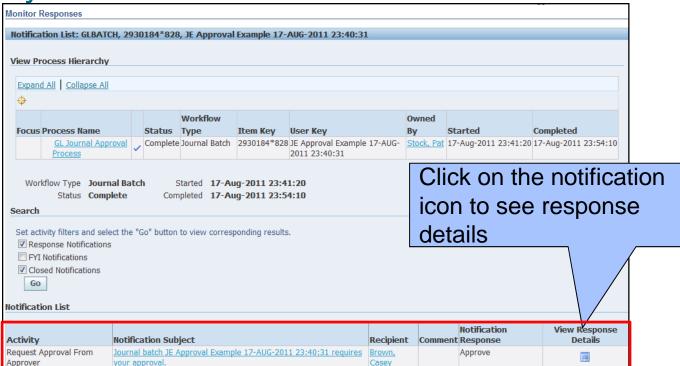






# Activity History Activity Section

 Participant Responses – view list of all notification activity and status







# **Activity History Activity Section**

- Participant response detail including any notes
  - Also available from Participant Responses link

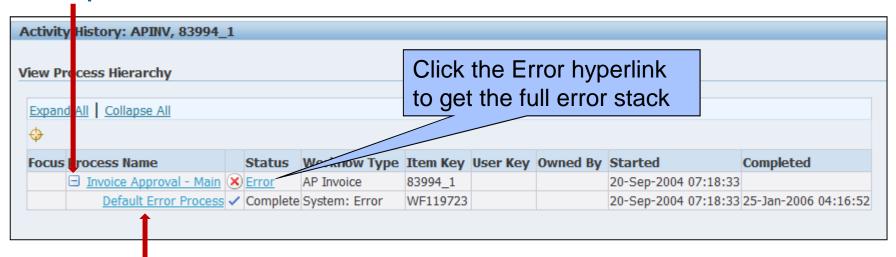
# Notification Response Details Notification Response Details Notification Subject Notification Subject Respondent Original Recipient Original Recipient Notification Sent Notification Sent 17-Aug-2011 23:41:23 Response Received Response Approve Signature Details This notification asked the respondent to provide the following information. Some or all fields may be blank. Comment





# Activity History Hierarchy Section

Expand the list to show child workflows



 Click the process name hyperlink to show activity history for the child workflow





### Workflow Details Link

- Workflow attributes
  - Shows all values related to the workflow process including error messages
    - Partial list shown here
- Workflow administrator can edit attributes and rewind/restart process

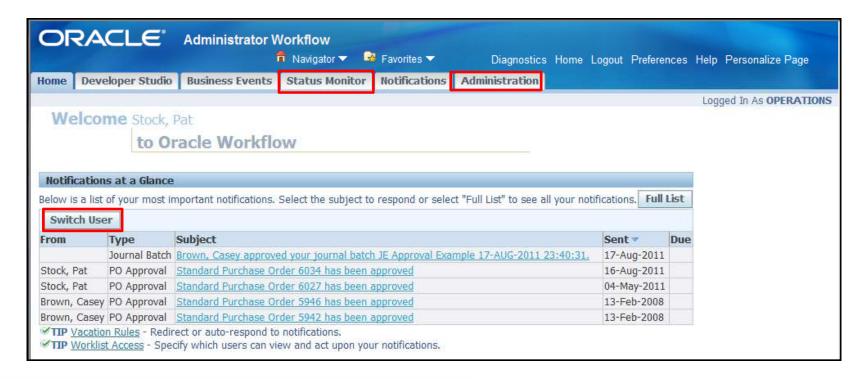
```
Workflow Attributes
                          Batch ID 2930184
                       Batch Name JE Approval Example 17-AUG-2011 23:40:31
           Budgetary Control Status N
                Batch Balance Type A
                Batch Control Total
          Batch Running Total Credit 50000
           Batch Running Total Debit 50000
                 Batch Period Name Dec-12
                        Ledger ID -1
                Functional Currency USD
             Budgetary Control Flag N
           Consolidation Ledger flag N
             Suspense Allowed Flag Y
              Average Balances Flag N
                Automatic Tax Flag N
           Latest Encumbrance Year 2008
                Total Batch Amount 50000
                       Preparer ID 25
             Preparer's AOL User ID 1318
           Preparer AOL User Name OPERATIONS
             Preparer Display Name Stock, Pat
                    Preparer Name OPERATIONS
        Responsibility ID of preparer 50553
                       Approver ID 31
              Approver AOL User ID
             Approver Display Name Brown, Casey
                    Approver Name CBROWN
                       Manager ID 31
             Manager Display Name Brown, Casey
```





# Workflow Administration

 Troubleshooting tools are in Status Monitor and Administration tabs

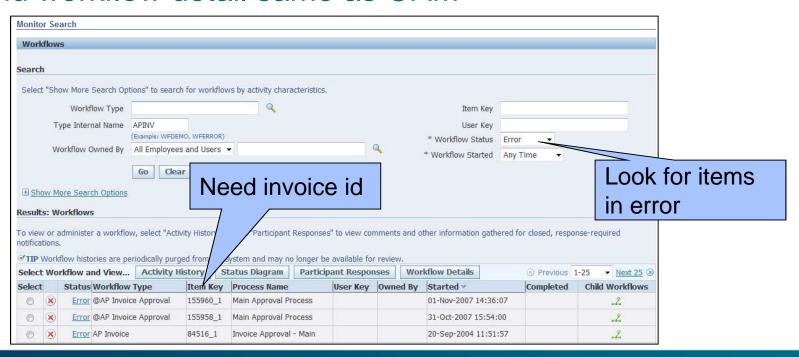






### Workflow Administration - Status Monitor

- Search for specific workflows here
  - Activity history, status diagram, participant responses and workflow detail same as OAM

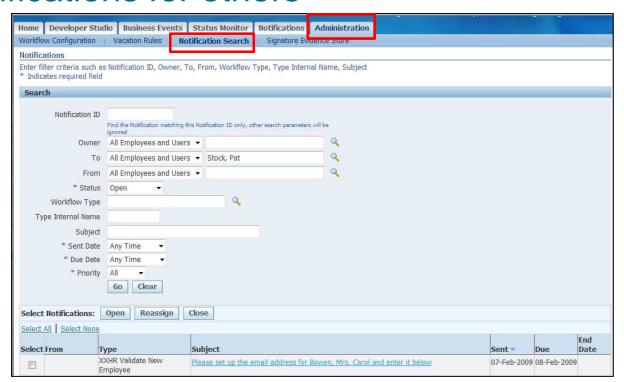






### Workflow Administration - Administration

 Notification search in this window allows search for notifications for others







# WORKFLOW TROUBLESHOOTING FOR DEVELOPERS AND DBAS





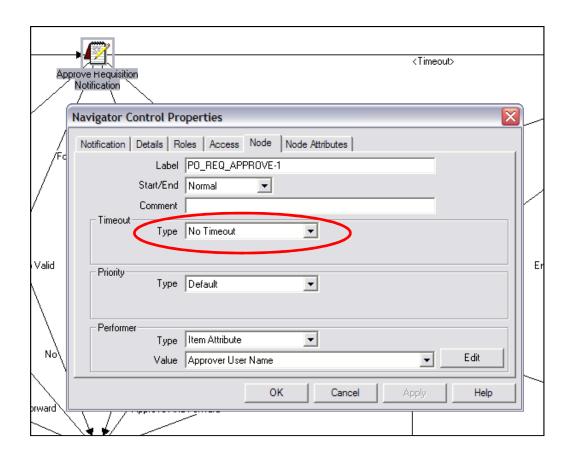
# Overview

- My Oracle Support Notes
  - 378287.1 or 1320509.1 "Latest ATG News", "E-Business Workflow Information Center"
  - 461431.1 "Script to Check What Workflow Related Patches Are Installed in EBusiness Suite R12"
    - One-offs not usually included
  - 336843.1 or 275379.1 "Oracle Workflow Diagnostic Script wfreleases.sql (Release 11i)", "Script to Check What ATG/Workflow Related Patches Are Installed In EBusiness Suite"
    - Includes very few one-offs
  - 342459.1 "E-Business Support Diagnostics Overview"
    - Click 'R12 Catalog' or '11i Catalog' to get current list of Diagnostics
  - 135266.1 "Oracle HRMS Product Family Release 11i and 12 Information"
    - HR patches are important for valid Directory Services functionality even when only running shared HR





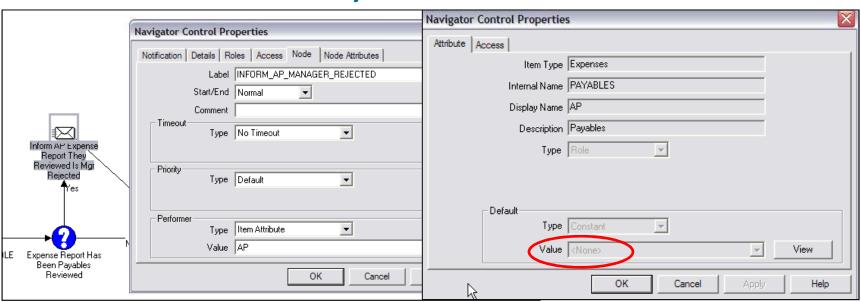
- Timeouts
  - Example –REQAPPRV
    - Timeout not defined







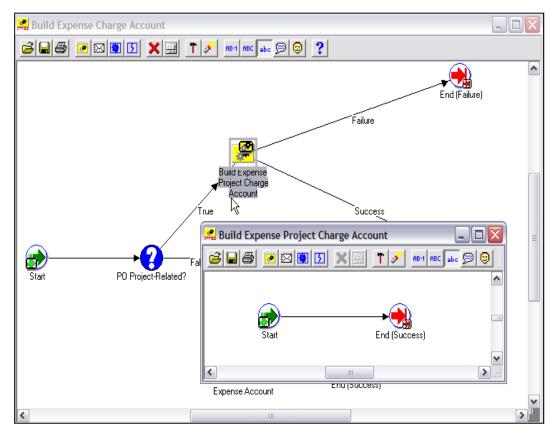
- Performers
  - Example APEXP
    - Who is informed if rejected







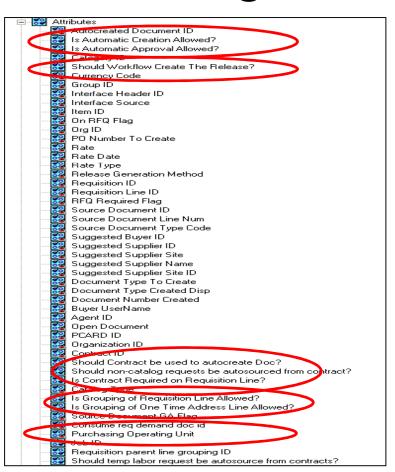
- AccountGenerators
  - If Using Projects, MUST customize POWFPOAG, POWFRQAG, PAAPINVW







- Attributes
  - Example CREATEPO, POERROR
    - Auto Create Allowed
    - Auto Approval Allowed
    - Is contact required







# Workflow Performance

- OAUG Conference Paper Database 2011
  - Workflow Performance Tuning in Release 12
    - Replace slide recommending parameters for SYSADMIN with a recommendation to "Change Framework User from SYSADMIN to User Dedicated to running the Mailer"
    - See next Slide for explanation





# Workflow Mailer

- Mailer User
  - Must be a workflow administrator
    - Will force administrator to be a responsibility
  - Should have following responsibilities only
    - System Administrator
    - Responsibility used as workflow administrator
  - Should not be a user with other duties
- Why not SYSADMIN
  - Performance: SYSADMIN usually has too many of own emails due to WFERROR emails
  - Manageability: Enabling log for SYSADMIN includes many other functions than mailer thus hampering troubleshooting





# Workflow Mailer

- Do NOT sign into Mailer email account to monitor activity (marks emails as read, won't go to EBS)
- If using inbound, use the Test Mailer functionality to ensure both types of messages can be processed
- Cloned instances
  - Cannot share same inbound mailer account
    - Cloned instance will "steal" emails from production
  - Use Override Notification Mailer Address
  - If shut down mailer, change mailer preferences globally and for individual users
    - Stored in FND\_USER\_PREFERENCES

```
UPDATE fnd_user_preferences
    SET preference_value = 'QUERY'
WHERE preference_name = 'MAILTYPE'
AND preference name != 'QUERY';
```





# Queries for Error Message From Errored Activity

```
SELECT wiasv.item_type
       ,wpa.process_name || ':' |
              wiasv.activity label activity
      ,wiasv.item begin date ,wiasv.item end date
      ,wiasv.activity_begin_date
      ,wiasv.activity_end_date ,wiasv.item_key
      , REPLACE (wiasv.error_message, CHR(10), '; ')
              error_message
      ,REPLACE (wiasv.error_stack, CHR(10), '; ')
              error stack
    FROM wf item activity statuses v wiasv
        ,wf_process_activities wpa
   WHERE wiasv.activity id = wpa.instance id
     AND wiasv.error_message IS NOT NULL
     AND wiasv.activity status code = 'ERROR'
ORDER BY 1 ASC, 2 ASC, 3 DESC;
```





# Queries for Error Message From WFERROR – Errored Item Type

```
SELECT Wf_Notification.GetAttrText(notification_id,
    'ERROR_ITEM_TYPE') errored_workflow
    ,Wf_notification.GetAttrText(notification_id,
    'ERROR_ACTIVITY_LABEL') errored_activity
    ,begin_date sent
    ,REPLACE (subject, CHR (10), '; ') subject
    ,REPLACE (Wf_Notification.GetAttrText(notification_id,
    'ERROR_MESSAGE'), CHR (10), '; ') error_message
    ,REPLACE (Wf_Notification.GetAttrText(notification_id,
    'ERROR_STACK'), CHR (10), '; ') error_stack
    FROM wf_notifications
    WHERE MESSAGE_TYPE = 'WFERROR'
    AND message_name = 'RESET_ERROR_MESSAGE'
    AND status = 'OPEN'
ORDER BY 1 ASC, 2 ASC, 3 DESC;
```





# Queries for Error Message From WFERROR – Errored Event

```
SELECT Wf_Notification.GetAttrText(notification_id,
    'EVENT_NAME') error_event
    ,Wf_Notification.GetAttrText(notification_id,
    'EVENT_KEY') event_key
    ,begin_date sent
    ,REPLACE (Wf_Notification.GetAttrText(notification_id,
    'ERROR_MESSAGE'), CHR (10), '; ') error_message
    ,REPLACE (Wf_Notification.GetAttrText(notification_id,
    'ERROR_STACK'), CHR (10), '; ') error_stack
    FROM wf_notifications
    WHERE MESSAGE_TYPE = 'WFERROR'
    AND message_name = 'DEFAULT_EVENT_ERROR'
ORDER BY 1 ASC
    ,3 DESC;
```





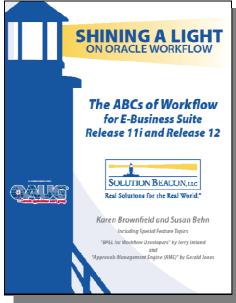
# Summary

- Workflow is for everyone
- Everyone benefits from
  - Better information
  - Smoother performance
  - Less errors, reduced frustration, increased thruput
  - Enablement to perform assigned tasks
    - Increased efficiency
    - Happier Employees
    - Reduced turnover
    - Lower costs





Release 12 Books by Rolta Employees



The ABCs of Workflow for Oracle E-Business Suite Release 11i and Release 12



The Release 12 Primer – Shining a Light on the Release 12 World

Available from Amazon.com, Barnes & Noble (bn.com) Lulu.com





# Questions?

Thank You!



Karen Brownfield
Karen.Brownfield@roltasolutions.com