

# Workflow Setups That Make a Difference

Presented by:

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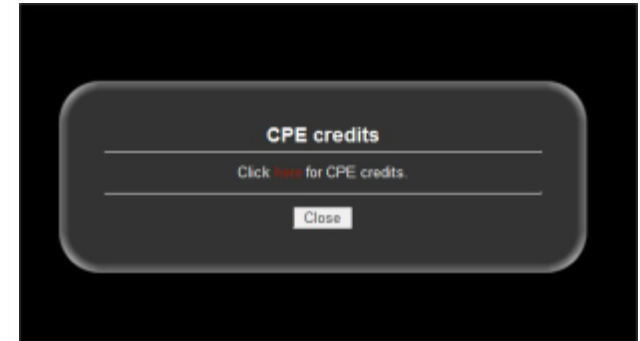
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**EBS Answers**  
Virtual Conference

# Webinar Mechanics



- Submit text questions in the chat log.
- Q&A addressed at the end of the session. Answers will be posted within two weeks on our new LinkedIn Group, EBS Answers: <http://www.linkedin.com/groups/EBS-Answers-4683349/about>
- Polling questions will be presented during the session. If you want CPE credit for this webinar, you must answer all of the polling questions.
- A recording of today's event will be available for 90 days for conference registrants.

# Learning Objectives

**Objective 1:** Obtain a high level overview of workflow in Oracle® E-Business Suite




**Objective 2:** Learn about setups that enhance administrator effectiveness

**Objective 3:** Learn about setups that enhance security in managing notifications


# *e*prentise®: Transformation Software for E-Business Suite

*Company Overview: Incorporated 2007, Helene Abrams, CEO*

## *e*prentise Can...

-  Consolidate Multiple EBS Instances
-  Change Underlying Structures and Configurations
  - Chart of Accounts, Other Flexfields
  - Merge or Split Ledgers or Sets of Books, Operating Units, Legal Entities, Inventory Organizations
  - Calendars, Currency, Costing Methods
  - Asset Revaluation, Inventory Valuation
-  Separate Data

## ...So Our Customers Can:

-  Reduce Operating Costs and Increase Efficiencies
  - Shared Services
  - Data Centers
-  Adapt to Change
  - Align with New Business Initiatives
  - Mergers, Acquisitions, Divestitures
-  Avoid a Reimplementation
-  Reduce Complexity and Control Risk
-  Improve Business Continuity, Service Quality and Compliance
-  Streamline Operations with Visibility to All Parts of the Business
-  Establish Data Quality Standards and a Single Source of Truth

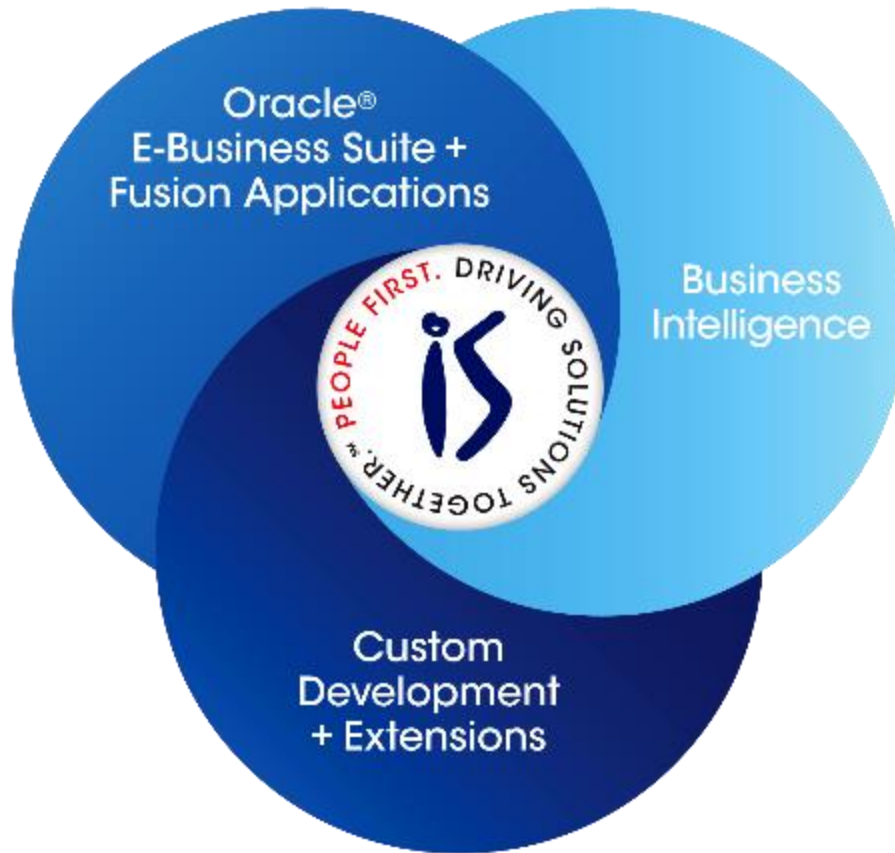
Finished But Not Done®

# About the Speaker

- 25 years E-Business Suite support
- OAUG Board 1994-2009, 2014-2017, former President
- Member ATG Customer Advisory Board
- Oracle EBS User Management SIG ATG CAB Liason
- Over 100 presentations at multiple venues
- Co-Author multiple books on E-Business Suite

***The ABCs of Workflow for E-Business Suite***  
***Release 11i and Release 12***  
**Available from Amazon.com,**  
**Barnes & Noble (bn.com)**  
**Lulu.com**

# About Infosemantics



- Established in 2001
- SBA 8(a) Small Business disadvantaged company
- GSA Schedule contract GS-35F-0680V
- Texas State HUB vendor
- For more information, go to our web site at [www.Infosemantics.com](http://www.Infosemantics.com)
  - R12.1.3 <sup>NEW</sup> R12.2.5, OBIEE public vision instances
  - Posted presentations on functional and technical topics



# Agenda

- Overview Workflow
- Workflow Analyzer
- Workflow Administrator
- Custom Notification Views
- Worklist Access via Grants
- Associate Administrator
- Notification Delegation Control

# Overview



# Workflow

- Management system that supports business process based integration between system(s) and people
  - Modeling
  - Automation
  - Approvals
  - Notifications
  - Account Generators
- If using 11i+ database, only available in EBS
- Not optional in EBS

# Workflow Components

- Workflow Engine – PL/SQL procedures
- Directory Services – Users and Roles
- Business Event System
- Advanced Queuing - Listeners
- Notification Services
  - Mailer is optional
- Administration pages – standard and OAM
- Workflow Builder
- Workflow Loader

# Workflow Analyzer

# Workflow Analyzer

- 1369938.1 – EBS Workflow (WF) Analyzer
  - Better than R12 Workflow Health Check Diagnostic or 11i Workflow Status and Purgeable Items or Workflow Performance
  - SQL Script – Updated frequently
  - Note provides script to register as concurrent request
    - Also provides link to new perl script that will install/update ALL Analyzers to the report group of your choice
  - FAQ – note 1452224.1
  - Focuses on Administration and Performance
  - [https://blogs.oracle.com/oracleworkflow/entry/e\\_business\\_suite\\_proactive\\_support](https://blogs.oracle.com/oracleworkflow/entry/e_business_suite_proactive_support)

# Workflow Analyzer

## EBS Workflow Analyzer Report

Compiled using version 200.13 / Latest version: **200.13**



### Report Information

Legend: Error Warning Passed Check

▶ Execution Details

▶ Parameters

▶ Execution Summary (2 16 )

### Sections In This Report

Workflow Analyzer  
Overview

Workflow Administration

Workflow Footprint

Workflow Concurrent  
Programs

Workflow Notification  
Mailer

Workflow Patch Levels

Order Management  
Specific Workflows

Human Resources  
Specific Workflows

Purchasing Specific  
Workflows

References

Show All Sections / Hide All Sections

# Workflow Administrator

# Workflow Administrator

- Seeded value is user SYSADMIN
- Use one of following Responsibilities
  - Workflow Administrator Web Applications
  - Workflow Administrator Web (New)
- Ensure Request Group "Workflow Administrator" assigned
  - Will have to add ability to run reports to menu
- PASYSADMIN and SYSADMIN and user assigned to mailer MUST have this responsibility

# Workflow Administrator Menu

Menus

Menu: FND\_WFADMIN\_NEW View Tree...

User Menu Name: Workflow Administrator (New)

Menu Type: Standard

Description: Workflow administrator access to new HTML look-and-feel modules.

Seq	Prompt	Submenu	Function	Description	Grant
5		Workflow Administrator A		Administrator workflow incorporating	<input checked="" type="checkbox"/>
10	Status Monitor Po		Error Workflows	Portlet displaying error workflows sta	<input checked="" type="checkbox"/>
15		Workflow Guest Monitor A		Main menu for "guest" monitor acces	<input checked="" type="checkbox"/>
20	Administrator Wo	Workflow Administrator N		Personal Home Page display menu.	<input checked="" type="checkbox"/>
25	Transaction Monit	XML Gateway Transactor		XML Gateway Transaction Monitor	<input checked="" type="checkbox"/>
30	Oracle Application	OAM Workflow Manager		OAM Workflow Manager	<input checked="" type="checkbox"/>
35	Worklist Flexfields	Custom Columns Rules M			<input checked="" type="checkbox"/>
40	Collaboration Mor	Collaboration Monitor			<input checked="" type="checkbox"/>
50	Personal Worklist		Personal Worklist		<input checked="" type="checkbox"/>
60	Requests	Standard Report Submiss			<input checked="" type="checkbox"/>

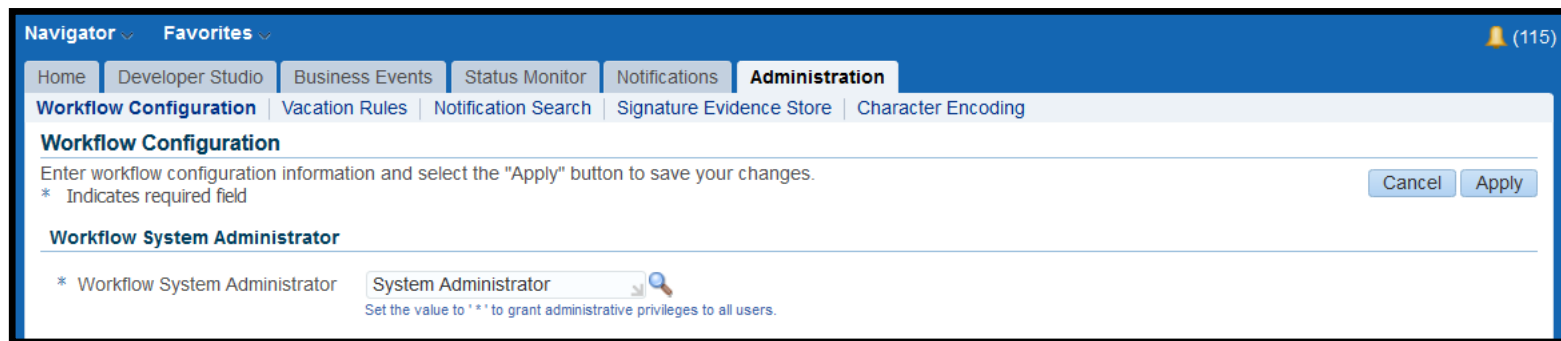


# Workflow Administrator Request Group

- Add the following programs
  - Synchronize Workflow Roles
    - This is required if using Resource Manager
  - Purge Order Management Workflow
  - R12.2
    - Workflow Directory Services Bulk Reset DISABLED Notification Preference
    - If running RAC, Workflow Background Process for RAC
      - May first need to enable the program

# Set Workflow Administrator Methods

- Administration Form
  - Must login as SYSADMIN to change from SYSADMIN



The screenshot shows the 'Administration' tab in the EBS interface. The 'Workflow Configuration' section is active, displaying instructions to enter configuration information and select the 'Apply' button. Below this, the 'Workflow System Administrator' section contains a required field for the administrator name, currently set to 'System Administrator'. A note indicates that setting the value to '\*' grants administrative privileges to all users. The interface includes a 'Cancel' button and an 'Apply' button.

- Change AutoConfig parameter and run AutoConfig
  - OAM (see following screen shot) allows select updates
- SQL

```
UPDATE wf_resources
  SET text = 'FND_RESP|FND|FNDWF_ADMIN_WEB_NEW|STANDARD'
 WHERE name = 'WF_ADMIN_ROLE';
```

# Ensure Patches Don't reset Admin Role

- OAM | AutoConfig
  - Click Update button for Applications Tier
  - System Tab, click + by oa\_workflow\_server

Last Updated:08-Feb-2014 21:23:39

Global System Local Environments oa\_ports oa\_services Custom

Expand All | Collapse All

Focus Title	OA_VAR	Status	Value	Description
System				
System Name	s_systemname	Not Changed		Name of the Oracle Applications system which this context points to.
Database SID	s_dbSid	Not Changed		Database SID for the system.
Database Name	s_dbGinam	Not Changed		Global Database name for the system. The value of this variable shall be the same as the Database SID on non-RAC environments. On RAC-environments, this name would be the same for all cluster nodes while the Database SID would be different for each cluster node.
Database SID (lower case)	s_dbSidLower	Not Changed		Database SID in lower case for the system
SITENAME	s_sitename	Not Changed		This context variable is used to store the value of SITENAME profile option. This value is unique for a given Oracle
Oracle Workflow Admin Role	s_wf_admin_role	Not Changed	FND_RESP SYSADMIN SYSTEM_ADMINISTRATOR	Role name of the Oracle Workflow Administrator.
oa_system_config				
oa_users				
customer_info				
nls_settings				
oa_shared_config				
oa_db_server				
oa_admin_server				
oa_cp_server				
oa_workflow_server				
Oracle Workflow Java Mailer IMAP Host	s_javamailer_imaphost	Not Changed	is-ext	Oracle Workflow Java Mailer IMAP Host
Oracle Workflow Java Mailer IMAP domain	s_javamailer_imapdomainname	Not Changed		Oracle Workflow Java Mailer domain
Oracle Workflow Admin Role	s_wf_admin_role	Not Changed	FND_RESP SYSADMIN SYSTEM_ADMINISTRATOR	Role name of the Oracle Workflow Administrator



# Ensure Workflow Admin Can Run Diagnostics

- Diagnostics are run from Application Diagnostics responsibility
  - In R12, this responsibility is inherited from one of three assigned roles (requires use of User Management)
- **What's great about this?**
  - Oracle seeds many diagnostics that can be used in troubleshooting or are required for filing SRs
    - MOS note 1083807.1 – use <CTRL>F, search for “Workflow”
  - Role Inheritance allows the assignment of the workflow administrator responsibility through standard Define User form to also assign the Diagnostics role and thus the Diagnostics responsibility
    - Limits need to grant Security Administrator role

# Setup Up Diagnostics Role Inheritance

- User Management, Roles and Role Inheritance
  - Query Responsibility assigned as Administrator
  - Click Green Cross under Add Node

**User Management**  
Users | **Roles & Role Inheritance** | Role Categories | Registration Processes | Security Report

### Roles and Role Inheritance

Define Role Inheritance Hierarchies by clicking **Add Node** at the appropriate level in the hierarchy. [View Full Hierarchy](#)

Personalize Table Layout: (SearchRegionLayout)  
Personalize "Search"

#### Search

Type:   
Name:   
Code:   
Application:

#### Legend

- Personalize Table Layout: (ContentContainerLayoutRN)
- Category
- Role
- Responsibility
- All Users (Everyone)
- Externally Managed Group
- Pending Role Relationship

Personalize "Role Inheritance Hierarchy"

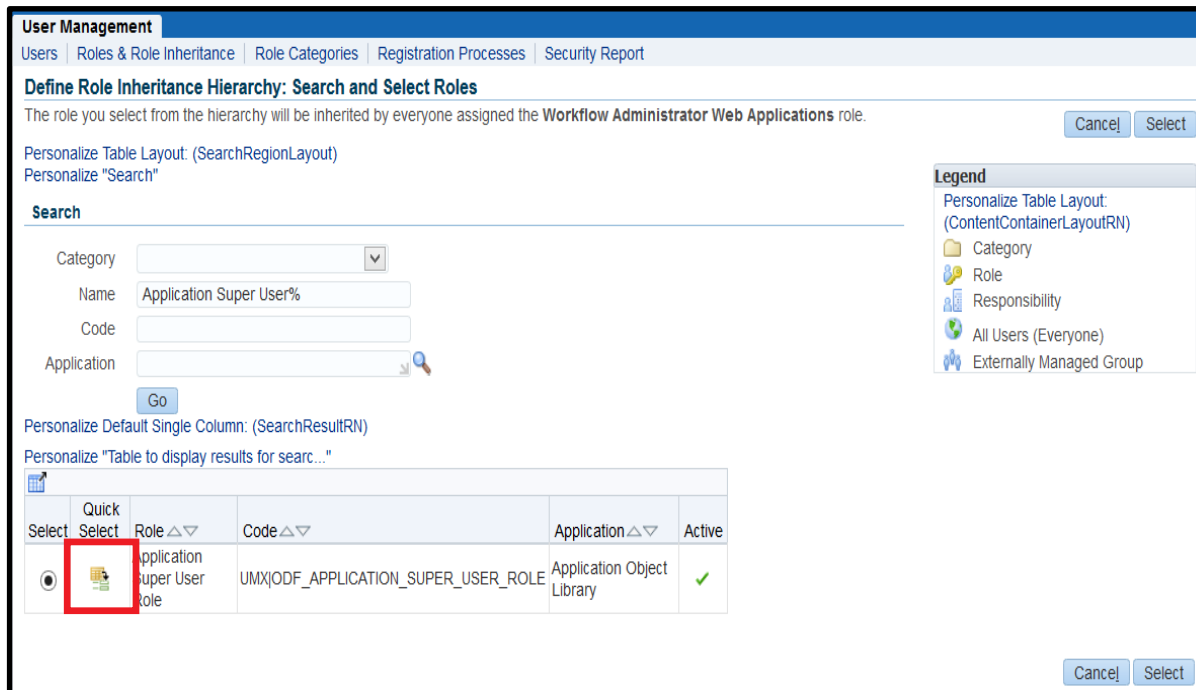
#### Role Inheritance Hierarchy

Personalize "View in Hierarchy"

Focus Name	Code	Application	Active	Update	Add Node	Remove Node
All Roles, Responsibilities, and Groups						
Workflow Administrator Web Applications	FND_RESP FND FNDWF_ADMIN_WEB STANDARD	Application Object Library	<input checked="" type="checkbox"/>			

# Setup Up Diagnostics Role Inheritance

- Enter 'Application Super User%' in Name, click Go
- When screen returns, click Quick Select



**User Management**

Users | Roles & Role Inheritance | Role Categories | Registration Processes | Security Report

**Define Role Inheritance Hierarchy: Search and Select Roles**

The role you select from the hierarchy will be inherited by everyone assigned the **Workflow Administrator Web Applications** role. Cancel Select


Personalize Table Layout: (SearchRegionLayout)  
Personalize "Search"

**Search**

Category

Name

Code

Application  

Go

Personalize Default Single Column: (SearchResultRN)  
Personalize "Table to display results for search..."

Quick Select	Role <input type="text"/>	Code <input type="text"/>	Application <input type="text"/>	Active
<input checked="" type="radio"/>	Application Super User Role	UMX\ODF_APPLICATION_SUPER_USER_ROLE	Application Object Library	✓

Cancel Select

**Legend**

- Personalize Table Layout: (ContentContainerLayoutRN)
- Category
- Role
- Responsibility
- All Users (Everyone)
- Externally Managed Group

# Setup Up Diagnostics Role Inheritance

- Newly setup hierarchy displayed
  - When 'Workflow Administrator Web Applications' is assigned as responsibility, 'Applications Diagnostics' responsibility is also assigned as Indirect Responsibility

**Role Inheritance Hierarchy**

Personalize "View in Hierarchy"

Create Role

Focus	Name	Code	Application	Active	Update	Add Node	Remove Node
	📁 All Roles, Responsibilities, and Groups						
📁	📁 Workflow Administrator Web Applications	FND_RESP FND FNDWF_ADMIN_WEB STANDARD	Application Object Library	✓	✎	+	
📁	📁 Application Super User Role	UMX ODF_APPLICATION_SUPER_USER_ROLE	Application Object Library	✓	✎	+	✎
	📁 Application Diagnostics	FND_RESP FND APPLICATION_DIAGNOSTICS STANDARD	Application Object Library	✓	✎	+	✎

# Poll Question



# Custom Notification Views

# Enable Export Button in Personal Worklist

- Open Personal Worklist
- Click Personalize link at top of page
  - Enable this link by setting profile option 'Personalize Self-Service Defn' to Yes (set this at user level)
- Select 'Export Button' in Style field, click Go
  - When form redisplay, click pencil in Personalize column

Personalize Page: Oracle Workflow: Notifications

Return to Application Choose Context Manage Levels Model Personalization

Personalization Context

Scope Page: Oracle Workflow: Notifications  
Document Name /oracle/apps/fnd/wf/worklist/webui/FullWorklistPG  
Site Include  
Organization Vision Operations  
Responsibility Workflow Administrator Web Applications

Search

Style Export Button

Title/Prompt text

Include Personalized Items Only

Go

Name	Parent	Shown	User Personalizable	Personalize	Reorder	Create Item	Update Item	Delete Item	Seeded User Views	Customize Look And Feel	View in Hierarchy
Export Button: Export Flow Layout		Yes	Yes								

Return to Personalization Structure

Return to Application Choose Context Manage Levels Model Personalization

# Enable Export Button in Personal Worklist

- In Site column, change Rendered to 'true', click Apply
- Form returns to previous screen, click 'Return to Application'

**Personalize Export Button : Export**

Cancel Apply

**Personalization Context**

Scope: Page: Oracle Workflow: Notifications  
Document Name: /oracle/apps/fnd/wf/worklist/webui/FullWorklistPG  
Site: Include  
Organization: Vision Operations  
Responsibility: Workflow Administrator Web Applications

**Personalization Properties**

Clear Personalization [ ] Go Choose Levels Displayed

	Original Definition	Site	Organization: Vision Operations	Responsibility: Workflow Administrator Web Applications	Result / Source
Additional Text	Default	Inherit	Inherit	Inherit	Default / Original Definition
Admin Personalization	true	Inherit	Inherit	Inherit	true / Original Definition
CSS Class Default	Inherit	Inherit	Inherit	Inherit	Default / Original Definition
Rendered	false	true	Inherit	Inherit	true / Site

**Worklist**

View: Open Notifications [ ] Go Personalize

Select Notifications: Open Reassign Respond Close **Export**

Simple Search

Previous 1-25 Next 25

Resulting Button

# Export Button

- Internet Explorer
  - 'Do you want to open or save export.csv....'
    - Open – due to use of " as delimiter, looks like

From,"Type","Subject","Sent","Due",								
,,"System: Tests","OA Framework Message for Testing Workflow Notification Mailer - A121INT1","08-Feb-2014",",",								
,,"System: Tests","PLSQL Message for Testing Workflow Notification Mailer - A121INT1","08-Feb-2014",",",								
,,"System: Tests","OA Framework Message for Testing Workflow Notification Mailer - A121INT1","07-Feb-2014",",",								
,,"System: Tests","PLSQL Message for Testing Workflow Notification Mailer - A121INT1","07-Feb-2014",",",								
,,"System: Error","Local Event ERROR : oracle.apps.wf.notification.send / 4689057","07-Feb-2014",",",								

- Save and then use Open button from Excel – any CR in the data causes new line


From	Type	Subject	Sent	Due
	System: Error	Local Even	17-May-13	
	System: Error	Local Even	17-May-13	
Brown, Ca	HR	Please fix i	8-Jan-12	
	System: Error	Error in Workflow OEOL/48077 ORA-01403: no data found		
ORA-0140,				27-Dec-10
Al Harbi, H	HR	Please fix i	27-Dec-10	
Brown, Ca	HR	Please fix i	27-Dec-10	
	System: Error	Error in Workflow OEOL/47437 ORA-01403: no data found		
ORA-0140,				25-Dec-10

# Export Button

- Firefox
  - 'You have chosen to open'
    - If choose 'Open with Microsoft Excel' Issue with CRs disappears
    - If choose 'Save File', then issue with CR remains

Opening export.csv

You have chosen to open:

 **export.csv**

which is: Microsoft Excel Comma Separated Values File  
from: <http://r122visit2.infosemantics.net>

What should Firefox do with this file?

Open with Microsoft Excel (default)

Save File

Do this automatically for files like this from now on.

From	Type	Subject	Sent	Due
	Expenses	Expense W35989 (40.00 USD)	4-Mar-14	7-Mar-14
	Expenses	Expense W36009 (15.00 USD)	4-Mar-14	7-Mar-14
	System: Error	Error in Workflow APEXP/35843 ORA-01403: no data found	7-Feb-14	
	System: Error	Error in Workflow PARAPTEM/10001-10309 ORA-01653: unable to extend table SYS.SOURCE\$ by 128 in tablespace SYSTEM ORA-06508: PL/SQL: could not find program unit being called: "APPS.PA_FORECAST_ITEMS_UT ILS"	5-Feb-14	

# 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

# Worklist Flexfields - Create Flexfield Rule

- 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

**Worklist Flexfields Rules**

Enter at least one of Rule Name, Display Name, Level or Workflow Type criteria.

**Search**

Rule Name	<input type="text"/>	Level	<input type="text" value="Any"/>
Display Name	<input type="text"/>	Workflow Type	<input type="text" value="Any"/>
Phase	<input type="text"/>	Message Attribute	<input type="text"/>
Status	<input type="text" value="Any"/>	Column Name	<input type="text" value="Any"/>

**Create Rule**

Details	Rule Name	Display Name	Phase	Level	Status	Update
	No search conducted.					

# Worklist Flexfields - Create Flexfield Rule

- Name the rule and leave other attributes as shown

**ORACLE**

Diagnostics Preferences Help Personalize Page Close Window

Enter General Properties Select Filter Criteria Select Message Attributes Map Attributes to Columns

### Create Worklist Flexfields Rule: Enter General Properties

Determine in which order worklist flexfields rules take effect when more than one rule is applied to a notification. Lower phase rules are applied before higher phase rules. Cancel Step 1 of 4 Next

\* Indicates required field

\* Rule Name

\* Display Name

Level **User**

Status

\* Phase

Seeded Rules have Phase 1-99, Customer Site Rules have Phase 100 or higher.

Description

\* Owner Name

\* Owner Tag

Click Next

Cancel Step 1 of 4 Next



# Worklist Flexfields - Create Flexfield Rule

- Select the System: Error workflow using display name and click > to move it to 'Selected Filter Criteria'

Enter General Properties      **Select Filter Criteria**      Select Message Attributes      Map Attributes to Columns

**Create Worklist Flexfields Rule: Select Filter Criteria**

Identify Workflow Types to use as filter criteria to select notifications to which to apply this rule. Cancel Back Step 2 of 4 Next

Available Filter Criteria      Selected Filter Criteria

Workflow Type

System Module  
System: Mailer

System: Error

Move  
Move All  
Remove  
Remove All

Description

Cancel Back Step 2 of 4 Next

# Worklist Flexfields - Create Flexfield Rule

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

Enter General Properties      Select Filter Criteria      **Select Message Attributes**      Map Attributes to Columns

**Create Worklist Flexfields Rule: Select Message Attributes**

Identify Message Attributes to be duplicated in the notifications table and available for display in the Worklist. Cancel Back Step 3 of 4 Next

**Selected Filter Criteria**

Workflow Type	Type	Internal Name	Remove
System: Error	WFERROR		

**Message Attributes**

Message Attributes with the same Internal Name, Display Name and Data Type across multiple messages are displayed once.

Available      Selected

Attribute Type: All Go

Available	Selected
Error Activity ID (Number)	Error Item Type (Text)
Error Activity Label (Text)	Event Name (Text)
Error Assigned User (Text)	Error Message (Text)
Error Item Key (Text)	Error Stack (Text)
Error Notification ID (Number)	
Error Result Code (Text)	
Error Type (Text)	
Error User Key (Text)	
Error name (Text)	
Event Data URL (URL)	

Move      Move All      Remove      Remove All

Description:

**TIP** <Message Name> (<Internal Name>) appear in Description  
**TIP** + indicates this Message Attribute exists in Multiple Messages

# Worklist Flexfields - Create Flexfield Rule

- 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
- Click Finish

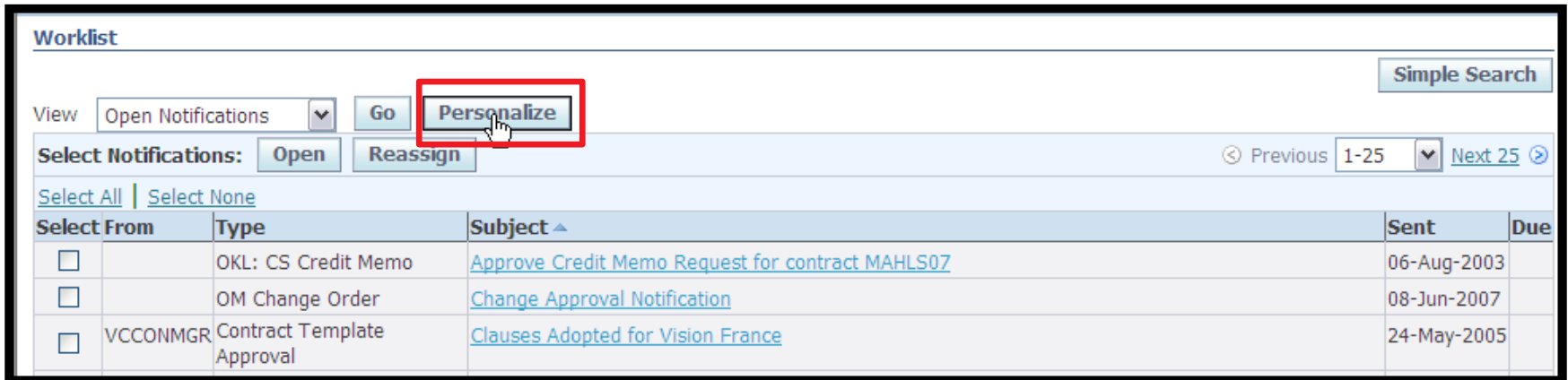
The screenshot shows the 'Map Attributes to Columns' step of the 'Create Worklist Flexfields Rule' process. The interface includes a progress bar at the top with four steps: 'Enter General Properties', 'Select Filter Criteria', 'Select Message Attributes', and 'Map Attributes to Columns' (the current step). Below the progress bar, the title is 'Create Worklist Flexfields Rule: Map Attributes to Columns'. The main instruction reads: 'Map message attributes to notification table attribute columns according to the message attribute type.' There are buttons for 'Cancel', 'Find Conflicts' (highlighted with a red box), 'Back', and 'Finish'. Below this is a table with the following data:

Display Name	Message Attribute Name	Type	Mapped Column	Remove
Error Item Type	ERROR_ITEM_TYPE	Text	TEXT_ATTRIBUTE1	
Error Message	ERROR_MESSAGE	Text	TEXT_ATTRIBUTE2	
Error Stack	ERROR_STACK	Text	TEXT_ATTRIBUTE3	
Event Name	EVENT_NAME	Text	TEXT_ATTRIBUTE4	

At the bottom, there is a tip: 'TIP Multiple Message Attribute Display Name appear for Message Attributes with same Internal Name and Data Type across multiple messages.' and another set of buttons: 'Cancel', 'Find Conflicts', 'Back', and 'Finish'.

# Create Personal Worklist View

- Use the Personalize button to create a new view



The screenshot shows the EBS Worklist interface. At the top, there is a "Worklist" header and a "Simple Search" button. Below the header, there is a "View" section with a dropdown menu set to "Open Notifications", a "Go" button, and a "Personalize" button highlighted with a red box. Below the "View" section, there is a "Select Notifications:" section with "Open" and "Reassign" buttons. To the right of this section, there are navigation buttons: "Previous", "1-25", a dropdown arrow, "Next 25", and "Next". Below the navigation buttons, there are links for "Select All" and "Select None". The main part of the interface is a table with the following columns: "Select From", "Type", "Subject", "Sent", and "Due". The table contains three rows of data:

Select From	Type	Subject	Sent	Due
<input type="checkbox"/>	OKL: CS Credit Memo	<a href="#">Approve Credit Memo Request for contract MAHLS07</a>	06-Aug-2003	
<input type="checkbox"/>	OM Change Order	<a href="#">Change Approval Notification</a>	08-Jun-2007	
<input type="checkbox"/> VCCONMGR	Contract Template Approval	<a href="#">Clauses Adopted for Vision France</a>	24-May-2005	

# 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	
Type	Type	
Status	Status	
To	To	
Information Requested From	Information Requested From	
Due	Due	
Closed	Closed	
Priority	Priority	
Notification ID	Notification ID	<input type="checkbox"/>
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	

# Create Personal Worklist View

- Limit the search to WFERROR workflows

**Sort Settings**

	Column Name	Sort Order
First Sort	Sent	descending
Second Sort	Errored Event	ascending
Third Sort		no sort order

**Search Query to Filter Data in your Table**

Specify parameters and values to filter the data that is displayed in your table.

**Advanced Search**

Show table data when all conditions are met.  
 Show table data when any condition is met.

Status	is	OPEN
Response Required	is	YES
Type Internal Name	is	WFERROR
Type Internal Name	is	
Subject	contains	Event

Add Another Subject Add

Cancel Revert Apply and View Results Apply

# Sample Views for WFERROR

**Worklist**

View: WFERROR from Events Go Personalize Simple Search

Select Notifications: Open Reassign Respond Close **Export** Refresh Settings Print Rows 1 to 300

Select All | Select None

Select	Errored Event	Subject	Sent	Error Message	Error Stack
<input type="checkbox"/>	oracle.apps.fnd.system.exception	Local Event ERROR : oracle.apps.fnd.system.exception / 81296090	22-May-2016	ORA-06502: PL/SQL: numeric or value error: character string buffer too small	WF_EVENT_OJMSTEXT_QH.Dequeue Wf_Event.Dequeue(AAE4B9EFC71BE Wf_Engine.CreateProcess(OAM_BE, 81296090, ALERT_PROC, oracle.app Wf_Rule.Default_Rule(oracle.apps.fn BEF2A3A6E25460ECE030B98B5963
<input type="checkbox"/>	oracle.apps.fnd.system.exception	Local Event ERROR : oracle.apps.fnd.system.exception / 81296170	22-May-2016	ORA-06502: PL/SQL: numeric or value error: character string buffer too small	WF_EVENT_OJMSTEXT_QH.Dequeue Wf_Event.Dequeue(AAE4B9EFC71BE Wf_Engine.CreateProcess(OAM_BE, 81296170, ALERT_PROC, oracle.app Wf_Rule.Default_Rule(oracle.apps.fn BEF2A3A6E25460ECE030B98B5963

*Note: A callout bubble labeled "Errors from Events" points to the top right of this screenshot.*

**Worklist**

View: WFERROR from Errored Workflows Go Personalize Simple Search

Select Notifications: Open Reassign Respond Close **Export** Refresh Settings Print

Select All | Select None

Select	Errored Workflow	Subject	Sent	Error Message	Error Stack
<input type="checkbox"/>	IGSPE002	Error in Workflow IGSPE002/oracle.apps.ar.hz.PartySite.create176141 ORA-06550: line 1, column 7: PLS-00201: identifier 'IGS_PE_WF_GEN.ADDRESS_CREATE' must be declared ORA-06550: line 1, column 7: PL/SQL: Statement ignored	24-Apr-2015	ORA-06550: line 1, column 7: PLS-00201: identifier 'IGS_PE_WF_GEN.ADDRESS_CREATE' must be declared ORA-06550: line 1, column 7: PL/SQL: Statement ignored	Wf_Engine_Util.Function_Call(igs_pe IGSPE002, oracle.apps.ar.hz.PartySit RUN)
<input type="checkbox"/>	IGSPE002	Error in Workflow IGSPE002/oracle.apps.ar.hz.PartySite.create176139 ORA-06550: line 1, column 7: PLS-00201: identifier 'IGS_PE_WF_GEN.ADDRESS_CREATE' must be declared ORA-06550: line 1, column 7: PL/SQL: Statement ignored	24-Apr-2015	ORA-06550: line 1, column 7: PLS-00201: identifier 'IGS_PE_WF_GEN.ADDRESS_CREATE' must be declared ORA-06550: line 1, column 7: PL/SQL: Statement ignored	Wf_Engine_Util.Function_Call(igs_pe IGSPE002, oracle.apps.ar.hz.PartySit RUN)

*Note: A callout bubble labeled "Errors from Item Types" points to the top right of this screenshot.*

# Worklist Access Via Grants



# VERY Brief Overview of Grant Functionality

- In R12, access security is increasingly governed by the creation of grants
- Terminology
  - Object – **Data** to be secured
  - Object Instance – particular instance of object
  - Object Instance Set – group of object instances
    - Predicate - “WHERE” clause for an object
      - Can be parameterized
  - Above accessed/defined from Functional **D**eveloper Responsibility

# VERY Brief Overview of Grant Functionality

- Terminology Review (continued)
  - Permission – right to see **Abstract** function and/or data
  - Permission Set – group of permissions/permission sets
    - Granted to Roles in order to enable Menu items and other functions
  - Above defined/accessed from Functional **A**Administrator Responsibility

# VERY Brief Overview of Grant Functionality

- Terminology Review (continued)
  - Grant – authority assigned to a Role to perform a specified Set of Actions (Permission Set) on a specified Object Instance (or Instance Set)
  - Grantee – to whom authority given
  - Grantee Type – Role/Group, Specific User, All Users
  - Grantee Key – the role or user
  - Above accessed/defined from Either responsibility although typically Functional Administrator is used

# Worklist Access to SYSADMIN's Notifications

- Granting Worklist Access to someone's notifications can now be done by administrator
- **What's great about this?**
  - Can provide access to SYSADMIN's notifications w/o logging in as SYSADMIN, w/o mixing notifications with your own, w/o email
  - Can provide access to multiple users (one per grant)
- From Functional Administrator responsibility, Security Tab, Grants link, Click Create Grant

The screenshot shows a web application interface for managing grants. At the top, there are navigation tabs: Security, Core Services, Personalization, File Manager, and Portletization. Below these, there are sub-tabs: Grants, Permissions, and Permission Sets. The main content area is titled 'Grants' and includes a 'Save Search' button. A search section follows, with the text 'The search is case insensitive.' and three input fields: 'Name', 'Grantee Type' (a dropdown menu currently set to 'All Users'), and 'Set'. There are also 'Go' and 'Clear' buttons. Below the search section is a 'Create Grant' button. At the bottom, there is a table with the following columns: Name, Grantee Type, Grantee Set, Object, Data, Context, Type, Access Policy, Last Update, Duplicate, Update, and Delete. The table currently shows 'No search conducted.'

# Worklist Access to SYSADMIN's Notifications

- Grant – Enter name
- Grantee Type – select “Specific User”
  - By Responsibility doesn't work
- Grantee - User who should see notifications
- Object – (Oracle defined) select “Notifications”
- Click Next

The screenshot shows the 'Create Grant: Define Grant' wizard in the Oracle EBS interface. The wizard is at Step 1 of 4. The 'Name' field is 'Grant Access to SYSADMIN's emails to OPERATIONS'. The 'Effective From' date is '04-Mar-2013'. The 'Grantee Type' is 'Specific User' and the 'Grantee' is 'Stock, Pat'. The 'Object' is 'Notifications'. A search window is open showing results for 'Stock, Pat'.

**Search and Select: Grantee**

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By Code Operations Go

**Results**

Select	Quick Select	Name	Code	Email Address
<input type="radio"/>		operations@computersvcsrental.com	OPERATIONS@COMPUTERSVCSRENTAL.COM	nobody@localhost
<input checked="" type="radio"/>		Stock, Pat	OPERATIONS	nobody@localhost

**Data Security**

To define a data security policy, select an object

Object Notifications

# Worklist Access to SYSADMIN's Notifications

- Data Context Type – select “Instance Set”
- Instance Set – (Oracle defined) select “Worklist Proxy Access”
- Click Next

The screenshot shows the Oracle EBS 'Create Grant: Select Object Data Context' wizard. The wizard is at Step 2 of 4. The 'Object' is 'Notifications'. The 'Data Context Type' is 'Instance Set'. The 'Instance Set' dropdown is set to 'Worklist Proxy Access'. There are 'Cancel', 'Back', and 'Next' buttons at the bottom of the form.

Security | Core Services | Personalization | File Manager | Portletization

Grants | Permissions | Permission Sets

Define Grant | **Select Object Data Context** | Define Object Parameters and Select Set | Review and Finish

Create Grant: Select Object Data Context

Cancel Back Step 2 of 4 Next

Object **Notifications**

Data Context Type Instance Set

\* Instance Set Worklist Proxy Access

Loading...

Cancel Back Step 2 of 4 Next

# Worklist Access to SYSADMIN's Notifications

- Parameter 1 – enter SYSADMIN
- Permission Set (Scroll to bottom of page) – (Oracle defined) select “Worklist Permission Set”
- Click Next, when confirmation page shows, click Finish

The screenshot shows the Oracle Security console interface. The breadcrumb trail is: Security > Core Services > Personalization > File Manager > Portletization > Grants > Permissions > Permission Sets. The current step is 'Define Object Parameters and Select Set', which is the third of four steps. The page title is 'Create Grant: Define Object Parameters and Select Set'. A progress bar at the top shows the current step is active. Below the title, there are 'Cancel', 'Back', and 'Next' buttons, and a 'Step 3 of 4' indicator. The main content area is divided into sections: 'Data Security' (Object: Notifications, Data Context), 'Predicate' (containing the SQL predicate: `&TABLE_ALIAS.TO_USER = &GRANT_ALIAS.PARAMETER1.`), and 'Instance Set Details' (with a text box for 'Parameter 1' containing 'SYSADMIN' and an empty 'Parameter 2' field).

This is a close-up of the 'Set' selection dialog. It has a title bar 'Set' and a message: 'Select the permission set or menu navigation set that defines the grantee's access.' Below the message is a text input field with a dropdown arrow and a search icon. The field contains the text '\* Set Worklist Permission Set'.

# Poll Question



# Associate Administrator

# Associate Administrator

- Grant Status Monitor access to specific workflows and specific actions w/o full Workflow Admin access
- **What's great about this?**
  - Restrict Access based on
    - Item Type
    - Item Attributes
  - Restrict Access based on Action
    - Skip
    - Retry
    - Rewind
    - Suspend
    - Cancel
    - Update (ability to update attribute)
    - Monitor (ability to view workflow)

# Associate Administrator

- Described in MOS note 412709.1 “Oracle Workflow Documentation Updates for 11i.ATG\_PF.H.delta.5 (RUP5)”, section “Assigning Specialized Workflow Monitoring Privileges”
- Cannot act as administrator for workflows where assigned as owner
  - Remember, not all workflows assign owners

# Associate Administrator Questions

- Does access to workflow **type** need to be determined by person/department?
  - No – grant 'All rows' to one responsibility
  - Dept – create grant and responsibility for each dept
  - Person – create grant for each person
- Does access to workflow **action** need to be determined by person/job?
  - No – create one role with desired permissions, role is subsidiary of responsibility
  - Yes – create multiple roles, assign role and resp

# Associate Administrator Steps Restrict by Item Type / Action

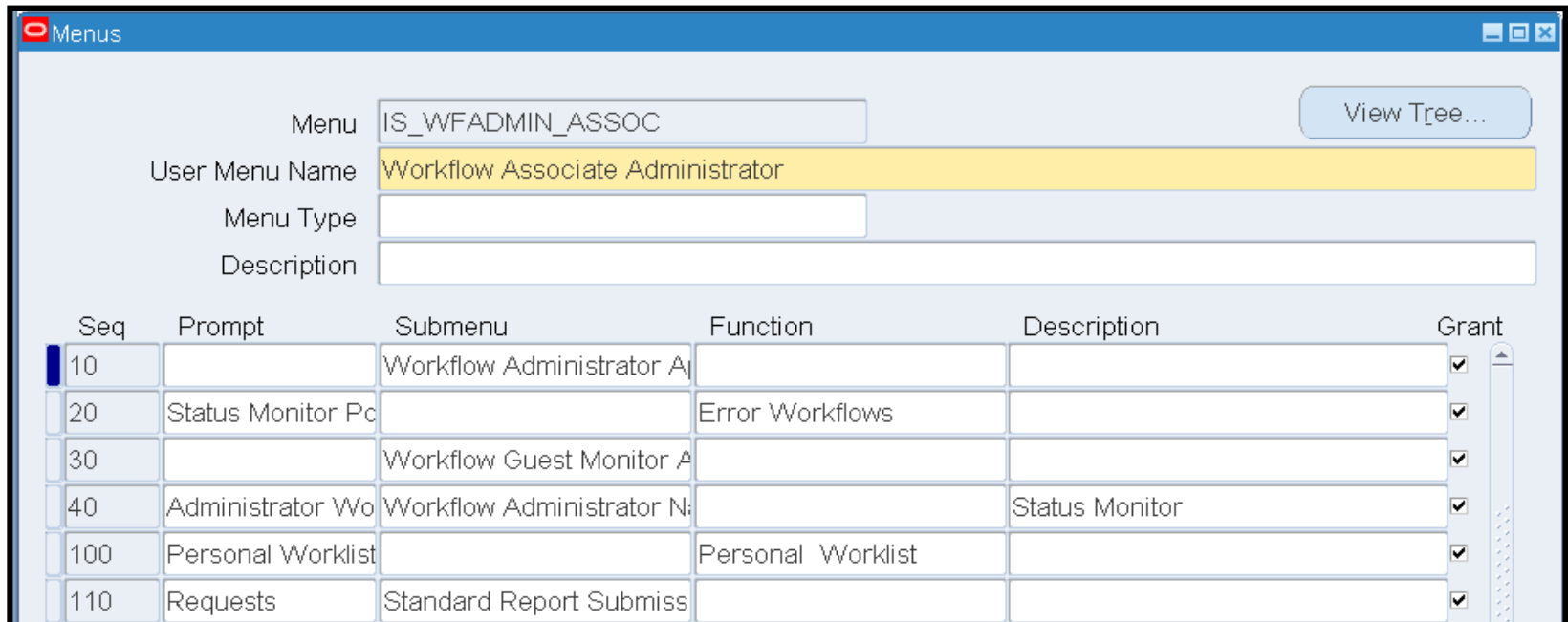
- One-time
  - Create menu and responsibility for administration
  - Create Object Instance Set for WORKFLOW\_ITEMS
    - Sets up parameter list so you can specify specific workflows
  - Create Action Permission Sets
  - Create Role(s) containing Action Permission Set(s)
  - Create Hierarchy for new responsibility to inherit new role
- Per User or Super User Responsibility
  - Create Grant for Object Instance Set created in previous step
    - Specify workflows or 'All rows'

# Associate Administrator

- Requires Responsibilities
  - Functional Developer
  - Functional Administrator
  - User Management
    - Can only be assigned from User Management responsibility
    - Inherited by assigning role "Security Administrator"

# Associate Administrator One-Time: Create New Menu

- Ensure access to Workflow Manager page of OAM is excluded



Menu: IS\_WFADMIN\_ASSOC View Tree...

User Menu Name: Workflow Associate Administrator

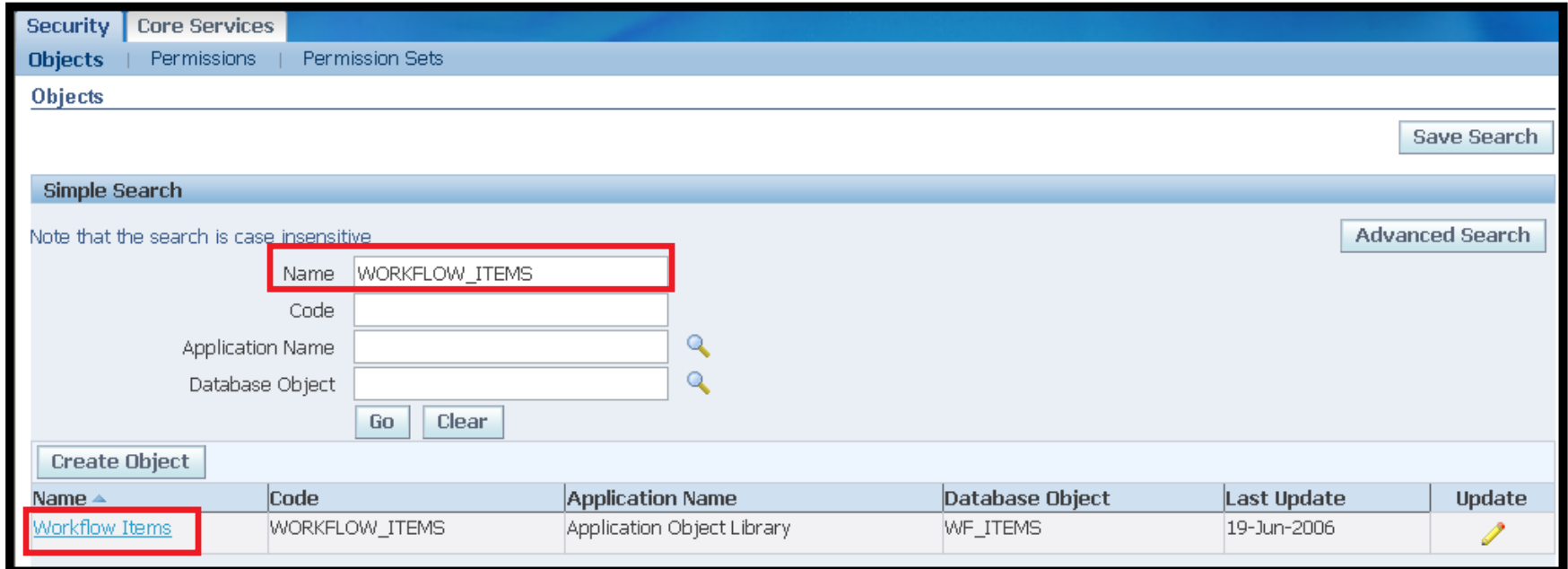
Menu Type:

Description:


Seq	Prompt	Submenu	Function	Description	Grant
10		Workflow Administrator A			<input checked="" type="checkbox"/>
20	Status Monitor Pc		Error Workflows		<input checked="" type="checkbox"/>
30		Workflow Guest Monitor A			<input checked="" type="checkbox"/>
40	Administrator Wo	Workflow Administrator N:		Status Monitor	<input checked="" type="checkbox"/>
100	Personal Worklist		Personal Worklist		<input checked="" type="checkbox"/>
110	Requests	Standard Report Submiss			<input checked="" type="checkbox"/>

- Create Workflow Associate Administrator responsibility and assign new menu
  - Optionally create and assign report group

# Associate Administrator One-Time: Object Instance Set



The screenshot shows the 'Objects' page in the EBS system. The 'Simple Search' section is active, with the 'Name' field containing 'WORKFLOW\_ITEMS'. Below the search fields, there is a 'Create Object' button and a table listing the search results. The table has columns for Name, Code, Application Name, Database Object, Last Update, and Update. The first row shows 'Workflow Items' with a red box around the name link.

Name	Code	Application Name	Database Object	Last Update	Update
<a href="#">Workflow Items</a>	WORKFLOW_ITEMS	Application Object Library	WF_ITEMS	19-Jun-2006	

- Use 'Functional Developer' responsibility
- Query Name 'WORKFLOW\_ITEMS'
- Click the link 'Workflow Items' (Not the 'Update' icon)



# Associate Administrator One-Time: Object Instance Set

The screenshot shows the Oracle EBS Security console interface. The top navigation bar includes 'Security' and 'Core Services'. Below this, there are tabs for 'Objects', 'Permissions', and 'Permission Sets'. The current view is 'Security: Objects >'. The main content area displays details for the object 'WORKFLOW\_ITEMS'. The details include:

- Name: Workflow Items
- Code: WORKFLOW\_ITEMS
- Application Name: Application Object Library
- Database Object: WF\_ITEMS
- Description: Data Object for Workflow Items

At the top right of the details section, there are 'Update' and 'Delete' buttons. Below the details, there are three tabs: 'Columns', 'Object Instance Sets', and 'Grants'. The 'Object Instance Sets' tab is selected and highlighted with a red box. A red arrow points from this tab down to the 'ITEM\_TYPE' column in the table below. The table has the following structure:

Column Name	Type
ITEM_TYPE	VARCHAR2
Column Name	Type
Column Name	Type
Column Name	Type
Column Name	Type

- Note Column Name 'ITEM\_TYPE'
- Click 'Object Instance Sets' tab above the Column Name

# Associate Administrator One-Time: Object Instance Set

The screenshot shows the configuration page for the object **WORKFLOW\_ITEMS**. The page is divided into several sections:

- Object: WORKFLOW\_ITEMS** (Header)
- Buttons:** **Update** and **Delete**
- Object Details:**
  - Name: **Workflow Items**
  - Code: **WORKFLOW\_ITEMS**
  - Application Name: **Application Object Library**
  - Database Object: **WF\_ITEMS**
  - Description: **Data Object for Workflow Items**
- Navigation Tabs:** **Columns**, **Object Instance Sets** (selected), **Grants**
- Create Instance Set Button:** A button labeled **Create Instance Set** is highlighted with a red box.
- Table:** A table with the following structure:

Name	Code	Description	Update

- Click the 'Create Instance Set' button

# Associate Administrator One-Time: Object Instance Set

Security | Core Services

Objects | Permissions | Permission Sets

Security: Objects > Object: WORKFLOW\_ITEMS >

**Create Object Instance Set**

\* Indicates required field

Cancel Apply

\* Name IS Item Types Junior Admin

\* Code IS\_ITEM\_TYPES\_JUNIOR\_ADMIN

Description Item TYPes that will be assigne to specific role

Predicate  
&TABLE\_ALIAS.ITEM\_TYPE=&GRANT\_ALIAS.PARAMETER1  
OR &TABLE\_ALIAS.ITEM\_TYPE=&GRANT\_ALIAS.PARAMETER2  
OR &TABLE\_ALIAS.ITEM\_TYPE=&GRANT\_ALIAS.PARAMETER3  
OR &TABLE\_ALIAS.ITEM\_TYPE=&GRANT\_ALIAS.PARAMETER4  
OR &TABLE\_ALIAS.ITEM\_TYPE=&GRANT\_ALIAS.PARAMETER5  
OR &TABLE\_ALIAS.ITEM\_TYPE=&GRANT\_ALIAS.PARAMETER6  
OR &TABLE\_ALIAS.ITEM\_TYPE=&GRANT\_ALIAS.PARAMETER7  
OR &TABLE\_ALIAS.ITEM\_TYPE=&GRANT\_ALIAS.PARAMETER8  
OR &TABLE\_ALIAS.ITEM\_TYPE=&GRANT\_ALIAS.PARAMETER9  
OR &TABLE\_ALIAS.ITEM\_TYPE=&GRANT\_ALIAS.PARAMETER10

Note:Where clause is auto-prepended. Just enter where clause

- Code – Internal Name; no spaces; can include hyphens and underscores; cannot be updated once saved

# Associate Administrator One-Time: Object Instance Set

The screenshot shows the Oracle Security console interface for creating an Object Instance Set. The breadcrumb trail is 'Security: Objects > Object: WORKFLOW\_ITEMS >'. The page title is 'Create Object Instance Set'. A note indicates that an asterisk (\*) denotes a required field. The form contains the following fields:

- Name:** IS Item Types Junior Admin
- Code:** IS\_ITEM\_TYPES\_JUNIOR\_ADMIN
- Description:** Item Types that will be assigne to specific role
- Predicate:** A text area containing a long list of OR clauses: `&TABLE_ALIAS.ITEM_TYPE=&GRANT_ALIAS.PARAMETER1` through `&TABLE_ALIAS.ITEM_TYPE=&GRANT_ALIAS.PARAMETER10`.

Buttons for 'Cancel' and 'Apply' are visible in the top right corner. A note at the bottom of the form states: 'Note:Where clause is auto-prepended. Just enter where clause'.

- Predicate – body of where clause w/o WHERE
- MOS note 412709.1 "Oracle Workflow Documentation Updates for 11i.ATG\_PF.H.delta.5 (RUP 5)" shows alternate predicates

# Associate Administrator One-Time: Object Instance Set

The screenshot shows the EBS Security console interface. At the top, there are tabs for 'Security' and 'Core Services'. Under 'Core Services', there are sub-tabs for 'Objects', 'Permissions', and 'Permission Sets'. A confirmation message states: 'Confirmation: IS\_ITEM\_TYPES\_JUNIOR\_ADMIN has been created successfully.' Below this, the object is identified as 'Object: WORKFLOW\_ITEMS'. There are 'Update' and 'Delete' buttons. The object details are: Name: Workflow Items, Code: WORKFLOW\_ITEMS, Application Name: Application Object Library, Database Object: WF\_ITEMS, and Description: Data Object for Workflow Items. There are three tabs: 'Columns', 'Object Instance Sets', and 'Grants'. The 'Object Instance Sets' tab is active, showing a 'Create Instance Set' button and a table with one instance set.

Name	Code	Description	Update
<a href="#">IS Item Types Junior Admin</a>	IS_ITEM_TYPES_JUNIOR_ADMIN	Item TTypes that will be assigne to specific role	

- Can create grants at this time or later using “Functional Administrator” responsibility

# Associate Administrator One-Time: Permission Set(s)

- Administrative Actions
  - To allow all actions, use User Management responsibility to assign the role 'Workflow Admin Role'
  - Otherwise
    - Create Permission Set(s) for allowed actions
      - Permissions already defined
    - Create role(s) and assign permission set
    - Assign new role to user
    - Note: permissions is union of all roles, so don't include Workflow Admin Role

Action	Permission Name	Permission Code
Skip	Skip Workflow Activity	WF_SKIP
Retry	Retry Activity	WF_RETRY
Rewind	Rewind Workflow	WF_REWIND
Suspend	Suspend Workflow	WF_SUSPEND
Cancel	Cancel Workflow	WF_CANCEL
Update	Update Workflow Item Attributes	WF_UPDATE_ATTR
Monitor	Monitor Data	WF_MON_DATA

# Associate Administrator One-Time: Permission Set(s)

Security | Core Services | Personalization | File Manager | Portletization

Grants | Permissions | **Permission Sets**

Security: Permission Sets >

**Create Permission Set**

\* Indicates required field

Cancel Apply

\* Name IS Workflow Retry Permission Set

\* Code IS\_WF\_RETRY\_SET

Description Permission Set containing only the permission WF\_RETRY (Retry Activity)

**Permission Set Builder**

Personalize "Permission Set Builder"

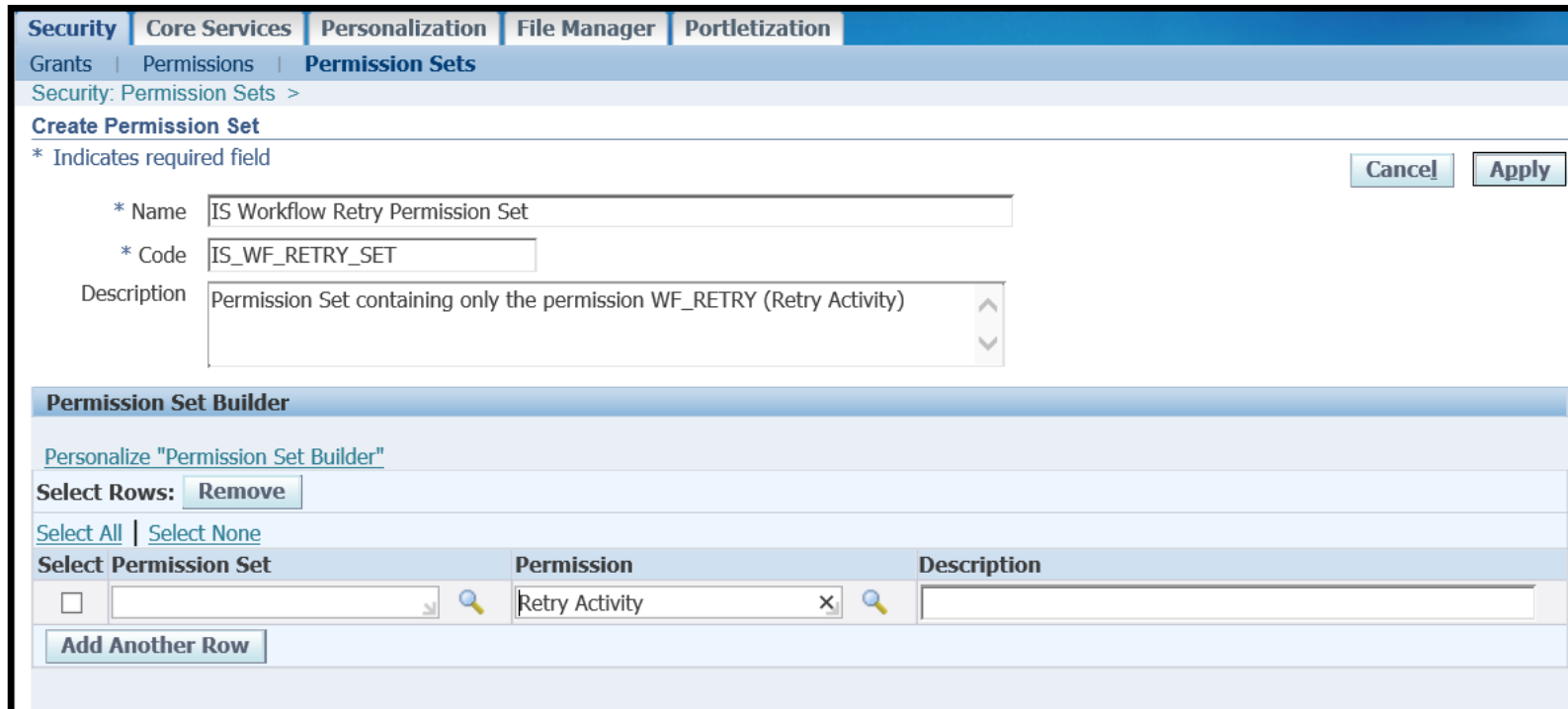
Select	Permission	Description
No results found.		

Add Another Row

Click 'Add Another Row'

- Functional Administrator Responsibility
- Permission Sets tab – Create Permission Set
- “Code” cannot be changed once saved

# Associate Administrator One-Time: Permission Set(s)



**Security** | Core Services | Personalization | File Manager | Portletization

Grants | Permissions | **Permission Sets**

Security: Permission Sets >

### Create Permission Set

\* Indicates required field

\* Name: IS Workflow Retry Permission Set

\* Code: IS\_WF\_RETRY\_SET

Description: Permission Set containing only the permission WF\_RETRY (Retry Activity)

---

#### Permission Set Builder

[Personalize "Permission Set Builder"](#)

Select Rows:

[Select All](#) | [Select None](#)

Select	Permission Set	Permission	Description
<input type="checkbox"/>		Retry Activity	

- Enter Permission(s)
- Click Apply (AFTER adding all desired rows)



# Associate Administrator One-Time: Permission Set(s)

The screenshot shows a web-based interface for creating a permission set. At the top, there are navigation tabs: Security, Core Services, Personalization, File Manager, and Portletization. Below these are sub-tabs: Grants, Permissions, and Permission Sets. The current page is titled 'Security: Permission Sets >' and 'Create Permission Set'. A note indicates that an asterisk (\*) denotes a required field. There are 'Cancel' and 'Apply' buttons in the top right. The form contains three input fields: 'Name' with the value 'IS Workflow Monitor Permission Set', 'Code' with 'IS\_WF\_MONITOR\_SET', and 'Description' with 'Permission Set containing only the permission WF\_MON\_DATA (Monitor Data)'. Below the form is a 'Permission Set Builder' section with a 'Personalize "Permission Set Builder"' link. It includes a 'Select Rows:' button labeled 'Remove', and 'Select All' and 'Select None' links. A table with three columns is shown: 'Select Permission Set', 'Permission', and 'Description'. The first row has an unchecked checkbox, a dropdown menu, a search icon, the text 'Monitor Data', another dropdown menu with a search icon, and an empty description field. An 'Add Another Row' button is located below the table.

**Create Permission Set**

\* Indicates required field

\* Name

\* Code

Description

**Permission Set Builder**

[Personalize "Permission Set Builder"](#)

Select Rows:

[Select All](#) | [Select None](#)

Select Permission Set	Permission	Description
<input type="checkbox"/> <input type="text"/>	<input type="text" value="Monitor Data"/>	<input type="text"/>

- Make sure one exists for viewing the workflows

# Associate Administrator One-Time: Create Role(s)

The screenshot shows the 'User Management' interface, specifically the 'Roles & Role Inheritance' section. The page title is 'User Management' and the navigation tabs are 'Users', 'Roles & Role Inheritance', 'Role Categories', and 'Registration Processes'. The main heading is 'Roles and Role Inheritance' with a sub-heading 'Define Role Inheritance Hierarchies by clicking **Add Node** at the appropriate level in the hierarchy.'

On the left, there is a 'Search' section with fields for 'Type', 'Name', 'Code', and 'Application', and a 'Go' button. On the right, there is a 'Legend' section with icons for 'Category', 'Role', 'Responsibility', 'All Users (Everyone)', 'Externally Managed Group', and 'Pending Role Relationship'.

The main content area is titled 'Role Inheritance Hierarchy' and contains a 'Create Role' button, which is highlighted with a red box. Below this is a table with the following columns: Focus Name, Code, Application, Active, Update, Add Node, and Remove Node. The table contains three rows of data:

Focus Name	Code	Application	Active	Update	Add Node	Remove Node
[-] All Roles, Responsibilities, and Groups						
[+] Roles & Responsibilities						
[+] Groups from other Source Systems						

- Resp – User Management | Roles & Role Inheritance
  - Initially SYSADMIN only person to have this responsibility
  - Must assign role 'Security Administrator' to get this role

# Associate Administrator One-Time: Create Role(s)

The screenshot shows the 'Create Role' form in the User Management interface. The form is titled 'Create Role' and includes a navigation bar with 'Users', 'Roles & Role Inheritance', 'Role Categories', 'Registration Processes', and 'Security Report'. The current page is 'User Management: Roles & Role Inheritance >'. The form includes a legend: '\* Indicates required field'. The form fields are: '\* Category' (Security Administration), '\* Role Code' (IS\_MONITOR\_WORKFLOW\_ROLE), '\* Display Name' (IS Monitor Workflow Role), '\* Description' (Allow monitoring of assigned workflows), '\* Application' (Application Object Library), '\* Active From' (11-Mar-2014), and 'Active To' (empty). The form has buttons for 'Cancel', 'Security Wizards', 'Save', and 'Apply'. Below the form is a 'Permissions' section with a 'Create Grant' button and a table with columns: Name, Set, Object, Data Context Type, Access Policy, Last Update, Duplicate, Update, and Delete. The table currently shows 'No results found.'

Name	Set	Object	Data Context Type	Access Policy	Last Update	Duplicate	Update	Delete
No results found.								

- Enter Information in top of form, click 'Save' NOT Apply
- Recommend Category 'Security Administration'
- After saving, click 'Create Grant'

# Associate Administrator One-Time: Create Role(s)

**User Management**

Users | **Roles & Role Inheritance** | Role Categories | Registration Processes | Security Report

Define Grant | Select Object Data Context | Define Object Parameters and Select Set | Review and Finish

**Create Grant: Define Grant**

\* Indicates required field

Step 1 of 4

\* Name

Description

\* Effective From    
(example: 24-Feb-2014)

Effective To

**Security Context**

Define the context when the grant is applied by selecting a grantee, a responsibility and/or operating unit.

Grantee Type **Group Of Users**

Grantee **IS Monitor Workflow Role**

Operating Unit

Responsibility

**Data Security**

To define a data security policy, select an object.

Object

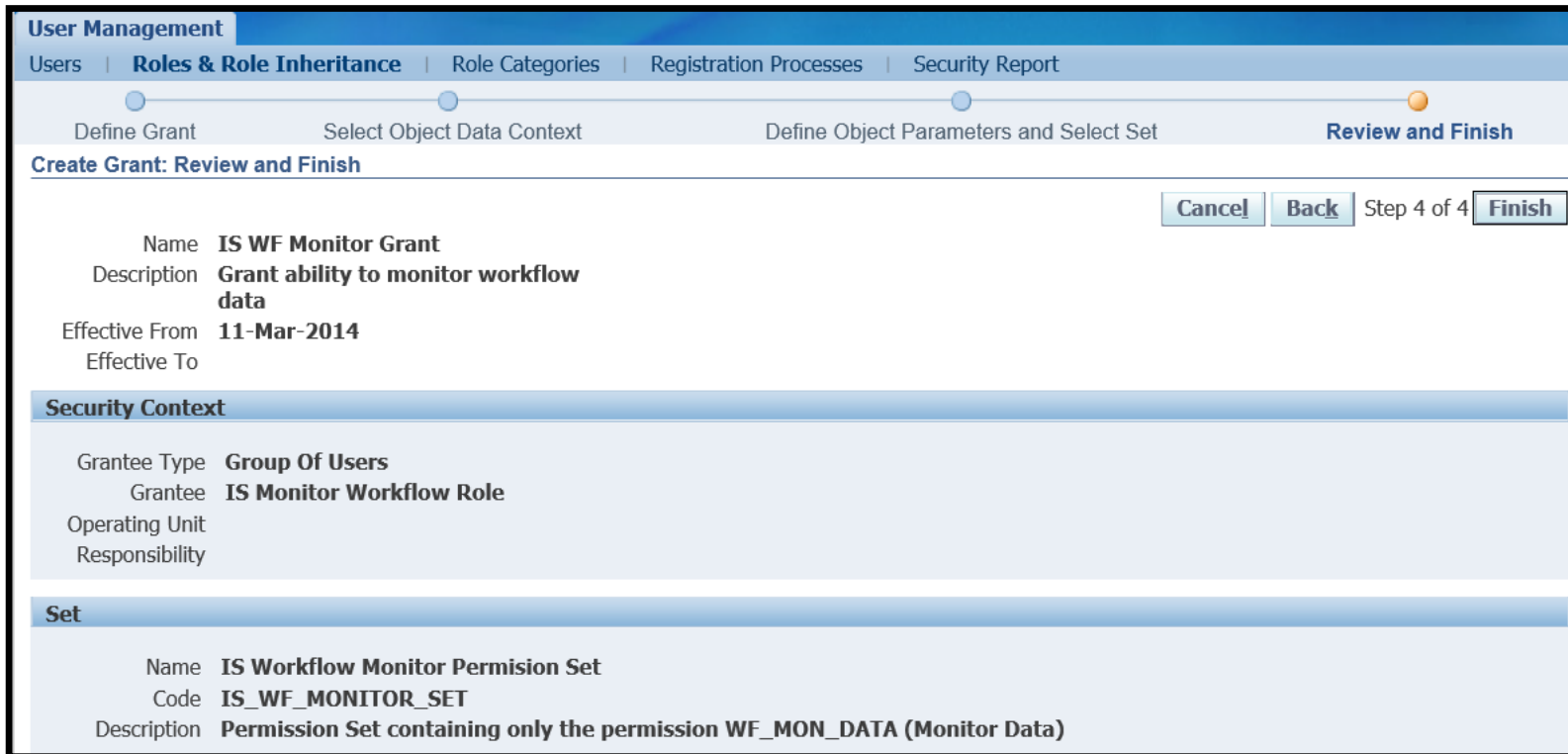
- Enter Name and (optional) Description, click Next

# Associate Administrator One-Time: Create Role(s)

The screenshot displays the 'User Management' interface. At the top, there is a navigation bar with tabs for 'Users', 'Roles & Role Inheritance', 'Role Categories', 'Registration Processes', and 'Security Report'. Below this is a progress indicator with four steps: 'Define Grant', 'Select Object Data Context', 'Define Object Parameters and Select Set' (which is the active step, indicated by an orange dot), and 'Review and Finish'. The main content area is titled 'Create Grant: Define Object Parameters and Select Set'. It includes a legend '\* Indicates required field' and navigation buttons for 'Cancel', 'Back', 'Step 3 of 4', and 'Next'. A section titled 'Set' contains the instruction 'Select the permission set or menu navigation set that defines the grantee's access.' Below this is a search input field with the text '\* Set' and the value 'IS Workflow Monitor Permission Set'. A magnifying glass icon is visible to the right of the input field.

- For this type of role, Step 2 was skipped
- Enter Permission Set Name for viewing workflows, click 'Next'
  - Create an additional grant to this role for every action that you wish to allow

# Associate Administrator One-Time: Create Role(s)



**User Management**

Users | **Roles & Role Inheritance** | Role Categories | Registration Processes | Security Report

Define Grant | Select Object Data Context | Define Object Parameters and Select Set | **Review and Finish**

**Create Grant: Review and Finish**

Cancel Back Step 4 of 4 Finish

Name **IS WF Monitor Grant**  
Description **Grant ability to monitor workflow data**  
Effective From **11-Mar-2014**  
Effective To

**Security Context**

Grantee Type **Group Of Users**  
Grantee **IS Monitor Workflow Role**  
Operating Unit  
Responsibility

**Set**

Name **IS Workflow Monitor Permission Set**  
Code **IS\_WF\_MONITOR\_SET**  
Description **Permission Set containing only the permission WF\_MON\_DATA (Monitor Data)**

- Verify Information, click 'Finish'
- A Confirmation screen appears, click OK

# Associate Administrator One-Time: Create Role(s)

**User Management**

Users | **Roles & Role Inheritance** | Role Categories | Registration Processes | Security Report

**Update Role : IS Monitor Workflow Role**

\* Indicates required field

\* Category: Security Administration

Role Code: **UMX|IS\_MONITOR\_WORKFLOW\_ROLE**

\* Display Name: IS Monitor Workflow Role

\* Description: Allow monitoring of assigned workflows

\* Application: Application Object Library

\* Active From: 11-Mar-2014  
(example: 24-Feb-2014)

Active To:

**Permissions**

Name	Set	Object	Data Context Type	Access Policy	Last Update	Duplicate	Update	Delete
<a href="#">IS WF Monitor Grant</a>	IS Workflow Monitor Permission Set				11-Mar-2014			

- Note that "UMX|" added to beginning of Role Code
- Roles can only be inactivated, grants can be deleted
- If want a role with view only and another role with view and retry, create the second role

# Associate Administrator

## One-Time: Create Role Hierarchy

- Decide who will need this role on what workflows, for example
- To enable an application superuser to view all workflows for the application
  - Responsibility -> Role -> Responsibility
    - Purchasing Super User -> IS Monitor Workflow Role -> Workflow Associate Administrator
- If functional SuperUsers cover multiple applications or you prefer to limit "indirect" responsibility assignments or role can both monitor and retry
  - Responsibility -> Role
    - Workflow Associate Administrator -> IS Monitor Workflow Role
    - Workflow Associate Administrator -> IS Retry Workflow Role



# Associate Administrator One-Time: Create Role Hierarchy

- User Management, Roles and Role Inheritance link
- Enter name of "top" role
- Click link in View in Hierarchy

**User Management**

Users | **Roles & Role Inheritance** | Role Categories | Registration Processes | Security Report

**Roles and Role Inheritance**

**Search**



Type

Name

Code

Application

**Create Role**

Role	Code	Application	Status	View In Hierarchy	Update
Workflow Associate Administrator	FND_RESP FND WK_ASSOCIATE_ADMINISTRATOR STANDARD	Application Object Library	✓		

# Associate Administrator One-Time: Create Role Hierarchy

- Click green +

**User Management**

Users | **Roles & Role Inheritance** | Role Categories | Registration Processes | Security Report

**Roles and Role Inheritance**

Define Role Inheritance Hierarchies by clicking **Add Node** at the appropriate level in the hierarchy. [View Full Hierarchy](#)

**Search**

Type

Name

Code

Application

**Legend**

- Category
- Role
- Responsibility
- All Users (Everyone)
- Externally Managed Group
- Pending Role Relationship

**Role Inheritance Hierarchy**

Focus Name	Code	Application	Active	Update	Add Node	Remove Node
All Roles, Responsibilities, and Groups						
Workflow Associate Administrator	FND_RESP FND WK_ASSOCIATE_ADMINISTRATOR STANDARD	Application Object Library	✓			

# Associate Administrator One-Time: Create Role Hierarchy

- Search for and select Role(s) that govern allowed action

**User Management**

Users | Roles & Role Inheritance | Role Categories | Registration Processes | Security Report

**Define Role Inheritance Hierarchy: Search and Select Roles**

The role you select from the hierarchy will be inherited by everyone assigned the **Workflow Associate Administrator** role. Cancel Select

**Search**

Category:

Name:

Code:

Application:

Go

**Legend**

- Category
- Role
- Responsibility
- All Users (Everyone)
- Externally Managed Group

Select	Quick Select	Role	Code	Application	Active
<input type="radio"/>		IS Monitor Workflow Role	UMX IS_MONITOR_WORKFLOW_ROLE	Application Object Library	✓

Cancel Select

# Associate Administrator One-Time: Create Role Hierarchy

- Result: When assigned Workflow Associate Administrator responsibility, inherit ability to view workflows even if not owner (which ones not assigned yet)

**User Management**

Users | **Roles & Role Inheritance** | Role Categories | Registration Processes | Security Report

**Roles and Role Inheritance**  
Define Role Inheritance Hierarchies by clicking **Add Node** at the appropriate level in the hierarchy.

[View Full Hierarchy](#)

**Search**

Type    
 Name   
 Code   
 Application

**Legend**

- Category
- Role
- Responsibility
- All Users (Everyone)
- Externally Managed Group
- Pending Role Relationship

**Role Inheritance Hierarchy**

Focus	Name	Code	Application	Active	Update	Add Node	Remove Node
	All Roles, Responsibilities, and Groups						
	Workflow Associate Administrator	FND_RESP FND WK_ASSOCIATE_ADMINISTRATOR STANDARD	Application Object Library	<input checked="" type="checkbox"/>			
	IS Monitor Workflow Role	UMX IS_MONITOR_WORKFLOW_ROLE	Application Object Library	<input checked="" type="checkbox"/>			

[View Full Hierarchy](#)

# Associate Administrator One-Time: Create Role Hierarchy

- Alternate Hierarchy – when assigned Purchasing Super User responsibility, inherit Workflow Associate Administrator as indirect responsibility with ability to view workflows even if not owner (which ones not assigned yet)

Focus	Name	Code	Application	Active	Update	Add Node	Remove Node
	All Roles, Responsibilities, and Groups						
	Purchasing Super User	FND_RESP PO PURCHASING_SUPER_USER STANDARD	Purchasing				
	Application Super User Role	UMX ODF_APPLICATION_SUPER_USER_ROLE	Application Object Library				
	Workflow Associate Administrator	FND_RESP FND WK_ASSOCIATE_ADMINISTRATOR STANDARD	Application Object Library				
	IS Monitor Workflow Role	UMX IS_MONITOR_WORKFLOW_ROLE	Application Object Library				

# Associate Administrator Specify Workflows Through Grant

- Functional Administrator Responsibility, Create Grant
  - Page 1
    - Name – User Defined
    - Grantee Type – Select “User”, “Group of Users” (and then choose Responsibility/Role) or specify Responsibility
    - Grantee – User Choice
    - Object – “Workflow Items”
  - Page 2
    - Data Context Type – Instance Set
    - Instance Set – select the one created in earlier slides
  - Page 3
    - Parameter 1-10 – enter internal name for 1-10 workflows
    - Set – “Business workflow item permission set”

# Associate Administrator

- In assigning responsibilities,
  - <Functional Super User> grants which workflows and inherits Workflow Associate Administrator which controls which actions can be performed
- The following forms will then allow admin access
  - Status Monitor
    - Cannot be Administrator for workflows you own
    - Restricted to assigned workflows and actions
  - Notification Search
    - Notification ID not present, but can access and respond to notifications
    - Can adjust menu to remove this function

# Notification Delegation Control



# Notification Delegation Control

- Ability to control LOV used when reassigning notifications through Vacation Rules, Worklist Access or from a specific notification based on business rules appropriate to the assigning user role
  - 12.2.4+ – Worklist Access replaced by Proxy User Access
- **What's great about this?**
  - Controls / stops inappropriate delegation
- Native to R12.2, backported to:
  - 11.5.10 – patch 12992653
  - 12.0.6 – patch 9645869
  - 12.1.x – patch 9572179
- R12.2 Workflow Admin Guide or MOS note 965413.1 – Configuring the Oracle Workflow User List of Values, Release 11.5.10, Release 12.0.6 and Release 12.1.1

# Notification Delegation Control

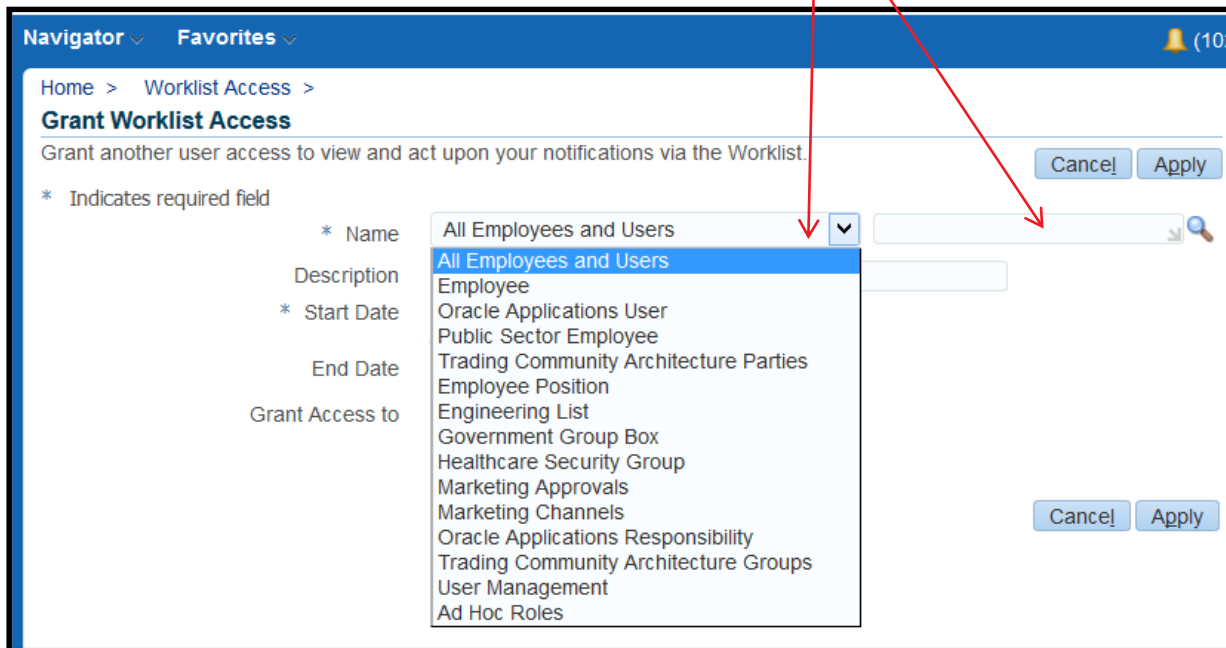
- Selecting alternate recipient for notification available from
  - Notifications Details page
    - Request More Information
    - Reassign
  - Worklist Access – 12.2.3 and below
  - Vacation Roles
  - Administer Vacation Rules
  - Administer Notification Rules
  - Administer Status Monitor
    - Waiting for response from
    - Workflow Owner

# Notification Delegation Control

- Selecting alternate recipient for notification available from
  - Administer Request Information
  - Signature Evidence Store – Requested Signee
  - Developer Studio, Run Workflow – Workflow Owner

# Notification Delegation Control

- Can restrict either (or both)
  - Partitions from which to select
    - Use Object 'Workflow Directory Partition'
  - Persons in a specific partition
    - Use Object 'Workflow Role LOV'



# Notification Delegation Control Seeded Instance Sets

- For object 'Workflow Directory Partition', 'Generic Partition Instance Set'
  - Allows restriction to 1-10 Original Systems
    - Use Internal Name of Original System
      - See list in Appendix slides
- For object 'Workflow Role LOV', 'Generic Role LOV Instance Set'
  - Allows restriction to 1-10 specific roles
    - WF\_USER\_ROLES.ROLE\_NAME

# Notification Delegation Control Examples

- Restrict delegation to
  - Up Supervisory Chain
  - Fellow buyers
  - Supplier users from same supplier

# Notification Delegation Control Steps

- Determine Business Rule
- If Rule dependent on context (user, responsibility)
  - Develop sample SQL using specific context
    - Becomes the Predicate for Instance Set
  - Test using Oracle provided template
  - Set up Instance Set
- If necessary, create role and role hierarchy
- Create Grant
- If grant assigned to specific role, assign role

# Notification Delegation Control Example – Up Supervisory Chain

- As LOV will depend on user, must create custom Instance Set for object 'Workflow Role LOV'
  - SQL must eventually be linked to FND\_GLOBAL.USER\_ID and view WF\_ROLE\_LOV\_VL
  - All users have partition\_id = 1 and ORIG\_SYSTEM = 'PER' (if linked to employee) or 'FND\_USER' (if not linked to employee)



# Templates for 'Workflow Role LOV' Object

- When partition is 'All Employees and Users'

```

SELECT *
FROM
  (SELECT WU.NAME AS USER_NAME,
        WU.DISPLAY_NAME,
        WDP.ORIG_SYSTEM,
        WU.EMAIL_ADDRESS,
        WU.ORIG_SYSTEM_ID,
        WU.PARTITION_ID
   FROM WF_ROLE_LOV_VL WU,
        WF_DIRECTORY_PARTITIONS WDP
   WHERE WU.PARTITION_ID = WDP.PARTITION_ID
        AND WU.PARTITION_ID <> 1
   UNION ALL
   SELECT WU.NAME AS USER_NAME,
        WU.DISPLAY_NAME,
        WU.ORIG_SYSTEM,
        WU.EMAIL_ADDRESS,
        WU.ORIG_SYSTEM_ID,
        WU.PARTITION_ID
   FROM WF_ROLE_LOV_VL WU
   WHERE WU.PARTITION_ID = 1
  ) QRSLT
WHERE (ORIG_SYSTEM IN ('FND_USR', 'PQH_ROLE', 'PER')
      AND (
        -- Custom predicate goes here
      )
)
ORDER BY DISPLAY_NAME;

```

- When partition is not 'All Employees and Users'

```

SELECT *
FROM
  (SELECT WU.NAME AS USER_NAME,
        WU.DISPLAY_NAME,
        WDP.ORIG_SYSTEM,
        WU.EMAIL_ADDRESS,
        WU.ORIG_SYSTEM_ID,
        WU.PARTITION_ID
   FROM WF_ROLE_LOV_VL WU,
        WF_DIRECTORY_PARTITIONS WDP
   WHERE WU.PARTITION_ID = WDP.PARTITION_ID
        AND WU.PARTITION_ID <> 1
   UNION ALL
   SELECT WU.NAME AS USER_NAME,
        WU.DISPLAY_NAME,
        WU.ORIG_SYSTEM,
        WU.EMAIL_ADDRESS,
        WU.ORIG_SYSTEM_ID,
        WU.PARTITION_ID
   FROM WF_ROLE_LOV_VL WU
   WHERE WU.PARTITION_ID = 1
  ) QRSLT
WHERE (ORIG_SYSTEM = '&PARTITION_CODE'
      AND (
        -- Custom predicate goes here
      )
)
ORDER BY DISPLAY_NAME;

```

# Notification Delegation Control Example – Up Supervisory Chain

- Code Used in Template
- Equivalent Predicate

```

AND (
  orig_system = 'PER'
  AND orig_system_id <>
  (SELECT employee_id
   FROM fnd_user
   WHERE user_id = 1318)
  AND orig_system_id in
  (SELECT person_id
   FROM (SELECT *
        FROM per_all_assignments_f
        WHERE SYSDATE BETWEEN effective_start_date
          AND effective_end_date) paf
   CONNECT BY person_id = PRIOR supervisor_id
   START WITH person_id =
   (SELECT employee_id
    FROM fnd_user
    WHERE user_id = 1318)
  )
)

```

```

&TABLE_ALIAS.Orig_System = 'PER'
and &TABLE_ALIAS.Orig_System_Id <>
(select employee_id from fnd_user
 where user_id = FND_GLOBAL.USER_ID)
and &TABLE_ALIAS.Orig_System_Id in
(select person_id
 from (select *
 from per_all_assignments_f
 where SYSDATE between effective_start_date and effective_end_date) paf
 connect by person_id = prior supervisor_id
 start with person_id =
 (select employee_id from fnd_user
  where user_id = FND_GLOBAL.USER_ID))

```

- Replace all orig\_system with &TABLE\_ALIAS.ORIG\_SYSTEM and all orig\_system\_id with &TABLE\_ALIAS.ORIG\_SYSTEM\_ID
- Replace all hard-coded user\_id's with FND\_GLOBAL.USER\_ID
  - Same for other context dependent variables like responsibility\_id
- Thanks to Guiseppe Bonavita, OTN Community for hierarchy code

# Notification Delegation Control Results

- Returns supervisory chain for 'All Employees and Users' and 'Employee'
  - Otherwise no value is returned

The screenshot displays a web application interface with a blue header bar containing 'Navigator' and 'Favorites' menus. The main content area is titled 'Grant Worklist Access' and includes a sub-header 'Grant another user access to view and act upon your notifications via the Worklist.' Below this, there are several form fields: a required 'Name' field with a dropdown menu set to 'All Employees and Users' and a '%' wildcard; a 'Description' text box; a required 'Start Date' field set to '10-Jul-2014' with a calendar icon and an example '(example: 25-Jun-2014)'; an 'End Date' field with a calendar icon; and a 'Grant Access to' section with two radio buttons: 'All Item Types' (selected) and 'Selected Item Types'. There are 'Cancel' and 'Apply' buttons on the right side of the form.

Below the main form, a 'Search and Select List of Values' dialog box is open in a Mozilla Firefox browser window. The dialog title is 'Search and Select: User or Role'. It features a search section with a 'Search By' dropdown set to 'Name' and a text input field containing '%'. A 'Go' button is next to the input field. Below the search section is a 'Results' table with the following data:

Select	Quick Select	Name	User Name	Email
<input type="radio"/>		Brown, Casey	CBROWN	nobody@localhost
<input type="radio"/>		Tucker, William	WTUCKER	nobody@localhost

At the bottom of the dialog, there is a link for 'About this Page'.

# Equivalent Policy – Manage Proxy Users

- Creating Policy Creates Instance Set

The screenshot displays the Oracle EBS Proxy Configuration interface. The 'Proxy Configuration' tab is active, and the 'Policies' sub-tab is selected. The 'Update Policy' form is shown with the following fields:

- Display Name:** IS Up Supervisory Chain
- Code:** IS\_UP\_SUPERVISORY\_CHAIN
- Description:** Immediate Supervisor and up
- Predicate:**

```
user_id <> FND_GLOBAL.USER_ID
AND
person_id IN
(SELECT person_id
 FROM (SELECT *
       FROM per_all_assignments_f
       WHERE SYSDATE BETWEEN effective_start_date AND effective_end_date)
 paf
CONNECT BY person_id = PRIOR supervisor_id
START WITH person_id = (SELECT employee_id
                        FROM fnd_user
                        WHERE user_id = FND_GLOBAL.USER_ID))
```

Buttons for 'Apply' and 'Cancel' are visible in the top right corner of the form area.

# Notification Delegations Control Allow Delegation to Any Buyer

**Object Instance Set: KB\_DELEGATE\_ANY\_BUYER**

\* Indicates required field

\* Name: Delegate to Any Buyer

\* Code: KB\_DELEGATE\_ANY\_BUYER

Description: Delegate to any buyer

Predicate: &TABLE\_ALIAS.ORIG\_SYSTEM = 'PER' and exists (select '1' from po\_agents where &TABLE\_ALIAS.ORIG\_SYSTEM\_ID = agent\_id)

Note: Where clause is auto-prepended. Just enter where clause

Objects Grants

Select Grants: Remove | Create Grant

Select All | Select None

Select	Name	Grantee Type	Grantee	Valid from	Valid to
<input type="checkbox"/>	Purchasing Super User	All Users	GLOBAL	06-Jul-2014	

So from that responsibility, LOV expands to include buyers

Grant is to responsibility

**Search and Select: User or Role**

Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By: Name % Go

Results

Select	Quick Select	Name	User Name	Email
<input type="radio"/>		Baker, Catherine	CBAKER	nobody@localhost
<input type="radio"/>		Baker, Jeffrey	JBAKER	nobody@localhost
<input type="radio"/>		Baker, Sandy	SBAKER	
<input type="radio"/>		Bakker, Albert	ALBERT	nobody@localhost
<input type="radio"/>		Barclay, Ian	TM	
<input type="radio"/>		Barrows, Phillip	PBARROWS	nobody@localhost
<input type="radio"/>		Bart, Lou	LBART	
<input type="radio"/>		Bartels, Stefan	STEFAN	
<input type="radio"/>		Bartolucci, Tanya	UKHRTRAIN	tbartolucc
<input type="radio"/>		Barton, Jeffrey	EBUSINESS-MFG	

About this Page

# Notification Delegation Control Supplier User Predicate

- Restricts iSupplier User to delegating only to other users within the same company

```
&TABLE_ALIAS.Orig_System = 'FND_USR'  
AND &TABLE_ALIAS.Orig_System_ID IN  
  (SELECT PV2.FND_USER_ID  
   FROM PO_SUPPLIER_USERS_V PV2  
   WHERE PV2.PO_VENDOR_ID =  
     (SELECT PV3.PO_VENDOR_ID  
      FROM PO_SUPPLIER_USERS_V PV3  
      WHERE PV3.FND_USER_ID = FND_GLOBAL.USER_ID))
```

- From R12.2 Workflow Administrator's Guide

# Notification Delegation Control Grant to Limit Partition

- Use object 'Workflow Directory Partition'
- Use seeded Instance Set 'Generic Partition Instance Set'
- To limit to 'All Employees and Users', specify in the parameters 'FND\_USR', 'PER', and 'PQH\_ROLE'
- Set is Workflow Directory Partition Permission Set

**Create Grant: Define Object Parameters and Select Set**  
\* Indicates required field

**Data Security**

Object Workflow Directory Partition

**Data Context**

Type	Instance Set
Name	Generic Partition Instance Set
Description	Generic Instance Set to Restrict the Visibility of Directory Partitions

**Predicate**

```
&TABLE_ALIAS.ORIG_SYSTEM  
IN  
(&GRANT_ALIAS.PARAMETER1,  
&GRANT_ALIAS.PARAMETER2,  
&GRANT_ALIAS.PARAMETER3,  
&GRANT_ALIAS.PARAMETER4,  
&GRANT_ALIAS.PARAMETER5,  
&GRANT_ALIAS.PARAMETER6,  
&GRANT_ALIAS.PARAMETER7,  
&GRANT_ALIAS.PARAMETER8,  
&GRANT_ALIAS.PARAMETER9,  
&GRANT_ALIAS.PARAMETER10)
```

**Instance Set Details**

Define the parameters for the selected data context.

Parameter 1	<input type="text" value="FND_USR"/>
Parameter 2	<input type="text" value="PER"/>
Parameter 3	<input type="text" value="PQH_ROLE"/>
Parameter 4	<input type="text"/>
Parameter 5	<input type="text"/>
Parameter 6	<input type="text"/>
Parameter 7	<input type="text"/>
Parameter 8	<input type="text"/>
Parameter 9	<input type="text"/>
Parameter 10	<input type="text"/>

**Set**

Select the permission set or menu navigation set that defines the grantee's access.

\* Set

# Notification Delegation Control Result of Preceding Grant

- LOV is limited

Home > Worklist Access >

## Grant Worklist Access

Grant another user access to view and act upon your notifications via the Worklist. Cancel! Apply

\* Indicates required field

* Name	Employee	▼	%	🔍
Description	Employee			
* Start Date	Oracle Applications User			
	Public Sector Employee			
	(example: 25-Jun-2014)			
End Date		📅		
Grant Access to	<input checked="" type="radio"/> All Item Types			
	<input type="radio"/> Selected Item Types			



# Poll Question

# Contact

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# Associate Administrator Specify Workflow Through Grants Details

# Associate Administrator Specify Workflows Through Grant

Security | Core Services | Personalization | File Manager

Grants | Permissions | Permission Sets

### Grants

Save Search

#### Search

The search is case insensitive.

Name

Grantee Type

Set

Object

Go Clear

**Create Grant**

Name	Grantee Type	Grantee	Set	Object	Data Context Type	Access Policy	Last Update	Duplicate	Update	Delete
No search conducted.										

- Functional Administrator Responsibility

# Associate Administrator Specify Workflows Through Grant

**Security** | Core Services | Personalization | File Manager | Portletization

**Grants** | Permissions | Permission Sets

Define Grant | Select Object Data Context | Define Object Parameters and Select Set | Review and Finish

**Create Grant: Define Grant**

\* Indicates required field

Step 1 of 4

\* Name

Description

\* Effective From   Effective To

(example: 24-Feb-2014)

---

**Security Context**

Define the context when the grant is applied by selecting a grantee, a responsibility and/or operating unit.

Grantee Type

\* Grantee

Operating Unit

Responsibility

---

**Data Security**

To define a data security policy, select an object.

Object  Object is 'Workflow Items'

# Associate Administrator Specify Workflows Through Grant

Security | Core Services | Personalization | File Manager | Portletization

Grants | Permissions | Permission Sets

Define Grant | **Select Object Data Context** | Define Object Parameters and Select Set | Review and Finish

Create Grant: Select Object Data Context

Cancel Back Step 2 of 4 Next

Object **Workflow Items**

Data Context Type Instance Set ▾

\* Instance Set IS Item Types Junior Admin 🔍

- Choices are
  - All rows – will allow access to all workflows
  - Instance – will allow access to a single workflow
  - Instance Set – will allow access to number controlled by instance Set
    - For the one displayed, 1-10 workflows

# Associate Administrator Specify Workflows Through Grant

- Enter Internal Names of up to 10 workflows
- For Set, enter 'Business workflow item permission set'

The screenshot displays the 'Create Grant: Define Object Parameters and Select Set' step in a web application. The interface includes a navigation bar with tabs for Security, Core Services, Personalization, File Manager, and Portletization. Below this, a progress bar shows four steps: Define Grant, Select Object Data Context, Define Object Parameters and Select Set (current), and Review and Finish. The main content area is divided into sections: Data Security, Instance Set Details, and Set. The Data Security section shows the Object as 'Workflow Items' and the Data Context as 'Instance Set' with the name 'IS Item Types Junior Admin'. The Predicate section contains the following logic: `&TABLE_ALIAS.ITEM_TYPE=&GRANT_ALIAS.PARAMETER1 OR &TABLE_ALIAS.ITEM_TYPE=&GRANT_ALIAS.PARAMETER2`. The Instance Set Details section lists 10 parameters with their values: Parameter 1 (POAPPRV), Parameter 2 (REQAPPRV), Parameter 3 (POERROR), Parameter 4 (PORCOTOL), Parameter 5 (PORCOTOL), Parameter 6 (POREQCHA), Parameter 7 (PORPOCHA), Parameter 8 (POSCHORD), Parameter 9 (POSSPAPP), and Parameter 10 (POSSPM1). The Set section has a dropdown menu with 'Business workflow item permission set' selected.

Security | Core Services | Personalization | File Manager | Portletization

Grants | Permissions | Permission Sets

Define Grant | Select Object Data Context | **Define Object Parameters and Select Set** | Review and Finish

Create Grant: Define Object Parameters and Select Set

\* Indicates required field

Cancel Back Step 3 of 4 Next

**Data Security**

Object **Workflow Items**

Data Context

Type **Instance Set**

Name **IS Item Types Junior Admin**

Description **Item TYPes that will be assigne to specific role**

**Predicate**

`&TABLE_ALIAS.ITEM_TYPE=&GRANT_ALIAS.PARAMETER1  
OR  
&TABLE_ALIAS.ITEM_TYPE=&GRANT_ALIAS.PARAMETER2`

**Instance Set Details**

Define the parameters for the selected data context.

Parameter 1

Parameter 2

Parameter 3

Parameter 4

Parameter 5

Parameter 6

Parameter 7

Parameter 8

Parameter 9

Parameter 10

**Set**

Select the permission set or menu navigation set that defines the grantee's access.

\* Set



# Associate Administrator Specify Workflows Through Grant

- Step 4 is just a review screen, if correct, click 'Finish'
- Returns to the Grant search screen

# Original System Internal Names

# Notification Delegation Control Partition – Original System Internal Name

- 0 – WF\_LOCAL\_ROLES – Ad Hoc Roles
- 1 – PER – Employee
- 1 – FND\_USR – Oracle Applications User
- 2 – FND\_RESP – Responsibilities
- 4 – POS – Employee Position
- 5 – AMV\_APPR – Marketing Approvals
- 6 – AMV\_CHN – Marketing Channels
- 7 – ENG\_LIST – Engineering List
- 8 – HZ\_GROUP – Trading Community Architecture Groups
- 9 – HZ\_PARTY – Trading Community Architecture Parties
- 10 – GBX – Government Group Box
- HTB\_SEC – Healthcare Security Group
- 12 – PQH\_ROLE – Position Control Role (Public Sector Empl)
- 13 – UMX – User Management

# Notification Delegation Control

# Notification Delegation Control Custom Instance Set

- Using Functional Developer, query Object, then click link in Name column (not Update pencil), then click Object Instance Set tab, then click Create Instance Set

The screenshot shows the Oracle Security interface. At the top, there are tabs for 'Security' and 'Core Services'. Below that, there are tabs for 'Objects', 'Permissions', and 'Permission Sets'. The 'Objects' tab is selected. A search form is visible with the following fields: Name (Workflow Role LOV), Code, Application Name, and Database Object. There are 'Go' and 'Clear' buttons. Below the search form, there is a table with the following data:

Name	Code	Application Name	Database Object	Last Update	Update
Workflow Role LOV	WF_ROLE_LOV	Application Object Library	WF_ROLE_LOV_VL	25-Jun-2009	

The screenshot shows the Oracle Security interface with the details for the 'WF\_ROLE\_LOV' object. The 'Object Instance Sets' tab is selected. The details for the object are as follows:

- Name: Workflow Role LOV
- Code: WF\_ROLE\_LOV
- Application Name: Application Object Library
- Database Object: WF\_ROLE\_LOV\_VL
- Description: Data Object for Workflow Role LOV

Below the details, there is a table with the following data:

Name	Code	Description	Update
Generic Role LOV Instance Set	WF_ROLE_LOV_ISET	Generic Instance Set to Restrict the Visibility of Roles	

# Notification Delegation Control Custom Instance Set

- Enter Name, Code, Description, and Predicate
- Click Apply
  - Code cannot be updated
  - Instance Sets cannot be deleted

The screenshot shows the 'Create Object Instance Set' form in the Oracle Security console. The form is titled 'Create Object Instance Set' and is located under 'Security > Core Services > Objects > Permissions > Permission Sets > Security: Objects > Object: WF\_ROLE\_LOV >'. The form contains the following fields:

- Name:** Delegate Up Supervisory Chain
- Code:** KB\_DELEGATE\_UP\_SUPV
- Description:** delegates only to immediate supervisor and above (user must be an employee)
- Predicate:**

```
&TABLE_ALIAS.Orig_System = 'PER'  
and &TABLE_ALIAS.Orig_System_ID <>  
(select employee_id from fnd_user  
where user_id = FND_GLOBAL.USER_ID)  
and &TABLE_ALIAS.Orig_System_ID in  
(select person_id  
from (select *  
from per_all_assignments_f  
where SYSDATE between effective_start_date and effective_end_date) paf  
connect by person_id = prior supervisor_id  
start with person_id =  
(select employee_id from fnd_user  
where user_id = FND_GLOBAL.USER_ID))
```

At the bottom of the form, there is a note: 'Note: Where clause is auto-prepended. Just enter where clause'. The form has 'Cancel' and 'Apply' buttons at the top right and bottom right.

# Notification Delegation Control Create Grant

- Grant can be created from
  - Instance Set in Update Mode (click Create Grant)

**Security** | Core Services

Objects | Permissions | Permission Sets

Security: Objects >

**Object Instance Set: KB\_DELEGATE\_UP\_SUPV**

\* Indicates required field

\* Name: Delegate Up Supervisory Chain

\* Code: KB\_DELEGATE\_UP\_SUPV

Description: Allow delegates only to immediate supervisor and above (user must be an empl...

Predicate:

```
&TABLE_ALIAS.Orig_System = 'PER'
and &TABLE_ALIAS.Orig_System_ID <>
(select employee_id from fnd_user
where user_id = FND_GLOBAL.USER_ID)
and &TABLE_ALIAS.Orig_System_ID in
(select person_id
from (select *
from per_all_assignments_f
where SYSDATE between effective_start_date and effective_end_date) pat
connect by person_id = prior supervisor_id
start with person_id =
(select employee_id from fnd_user
where user_id = FND_GLOBAL.USER_ID))
```

Note: Where clause is auto-prepended. Just enter where clause

Objects | **Grants**

Select Grants: Remove | Create Grant

Select All | Select None

Select	Name	Grantee Type	Grantee	Valid from	Valid to	Set	Data Context Type
<input type="checkbox"/>	KB_OPERATIONS_RE:	Specific User	Stock, Pat	06-Jul-2014		Workflow Role LOV Permis	Instance Set

- Functional Administrator, Grants tab (click Create Grant)

# Notification Delegation Control Create Grant – Step 1

- Enter Name
- Object is Workflow Role LOV
- Security Context – example below is specific user

The screenshot shows the 'Create Grant: Define Grant' step in a software interface. The interface is divided into several sections:

- Navigation:** A progress bar at the top shows four steps: 'Define Grant' (current), 'Select Object Data Context', 'Define Object Parameters and Select Set', and 'Review and Finish'.
- Form Fields:**
  - Name:** KB\_OPERATIONS\_RESTRICT\_NOTIFICATION\_REASSIGNMENT
  - Description:** restrict OPERATIONS to reassigning notifications to supervisor and above
  - Effective From:** 06-Jul-2014 (example: 21-Jun-2014)
  - Effective To:** (empty)
- Security Context:**
  - Grantee Type:** Specific User
  - Grantee:** Stock, Pat
  - Operating Unit:** (empty)
  - Responsibility:** (empty)
- Data Security:**
  - Object:** Workflow Role LOV

Buttons for 'Cancel', 'Step 1 of 4', and 'Next' are visible in the top right corner.



# Notification Delegation Control Security Context

- If choose specific user, must repeat for all applicable users
- If choose role, role can be assigned to multiple users using User Management
  - In our example, can create role Employee, assign grant to this role, then assign role to all employees
  - Roles can inherit responsibilities, but since role is assigned to user, not dependent on being in specific responsibility
- If choose operating unit, grant only applicable when operating unit context is set (i.e. won't work in GL)
- If choose responsibility, grant only applicable within that responsibility
  - Responsibilities can inherit roles or roles can inherit responsibilities
    - Role then is dependent on being in that responsibility

# Notification Delegation Control Create Grant – Step 2

- Choose Instance Set

The screenshot displays the 'Create Grant: Select Object Data Context' step in a web application. The interface includes a navigation bar with tabs for 'Security', 'Core Services', 'Personalization', 'File Manager', and 'Portletization'. Below this, there are sub-tabs for 'Grants', 'Permissions', and 'Permission Sets'. A progress bar indicates the current step is 'Select Object Data Context'. The main content area shows the following details:

- Object: Workflow Role LOV
- Data Context Type: Instance Set (dropdown)
- \* Instance Set: Delegate Up Supervisory Chain (searchable text input)

Navigation buttons are located at the bottom right of the form, including 'Cancel', 'Back', 'Step 2 of 4', and 'Next'.

- Other choice is All (which is equivalent to no limits) or Instance (which allows delegation to one and only one performer and can be done w/o custom Instance Set using seeded Instance Set Generic Role LOV Instance Set)

# Notification Delegation Control Create Grant – Step 3, top of form

- Scroll down to see bottom of form

**Security** | Core Services | Personalization | File Manager | Portletization

**Grants** | Permissions | Permission Sets

Define Grant | Select Object Data Context | **Define Object Parameters and Select Set** | Review and Finish

### Create Grant: Define Object Parameters and Select Set

\* Indicates required field

Cancel | Back | Step 3 of 4 | Next

**Data Security**

Object: **Workflow Role LOV**

**Data Context**

Type: **Instance Set**  
Name: **Delegate Up Supervisory Chain**  
Description: **Allow delegates only to immediate supervisor and above (user must be an employee)**

**Predicate**

```
&TABLE_ALIAS.Orig_System =
'PER' and
&TABLE_ALIAS.Orig_System_Id
<> (select employee_id from
fnd_user where user_id =
FND_Global.User_Id) and
&TABLE_ALIAS.Orig_System_Id
in (select person_id from (select
* from per_all_assignments_f
where SysDate between
effective_start_date and
effective_end_date) paf
connect by person_id = prior
supervisor_id start with
person_id = (select employee_id
from fnd_user where user_id =
FND_Global.User_Id))
```

# Notification Delegation Control Create Grant – Step 3, bottom of form

- Since predicate doesn't reference parameters, ignore this
- Set must be Workflow Role LOV Permission Set

**Instance Set Details**

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Define the parameters for the selected data context.

Parameter 1

Parameter 2

Parameter 3

Parameter 4

Parameter 5

Parameter 6

Parameter 7

Parameter 8


Parameter 9

Parameter 10

**Set**

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Select the permission set or menu navigation set that defines the grantee's access.

\* Set  

Step 3 of 4