

Mission : End user should be able to Track who has the workflow they requested for approval & implement this change with out changing anything on workflow itself.

Approval Dashboard (on user home page) can be plugged-in to display any pending workflow requested by the users & who need to approve them. User can also click on Approver name & send a follow-up email to the approver reminding them of the pending approval.

The screenshot shows the Oracle Lease Management (OLM) dashboard. At the top, there is a navigation bar with tabs: Home, Sales, Vendor, Origination, Contract Management, Operations, Asset, Processing, Setup, and Investor Management. Below the navigation bar, a welcome message reads "Welcome Rami Srivastava to Lease Management".

There are two main data tables:

Return Assets	
Status	Number
Manual Re-lease	13
Scrapped	42
Cancelled	500
Scheduled	1177
In Process	2
Renegotiated	134
Repurchased	2134
Passed To EBM	599
Offered To Vendor	68
Available For Sale	132
Available for Verification	3

Pending Approvals	
Request	Approver
Funding request 900011604500011819500012056 requires Approval Requested On: 04-JAN-2008	Roy, Mrs. Amanda
Funding request 900011604500011819500012056 requires Approval Requested On: 04-JAN-2008	Huberts, Mrs. Fiona
Funding request 900011604500011819500012056 requires Approval Requested On: 04-JAN-2008	Kataria, Mr. Chandra
Funding request 900011604500011819500012056 requires Approval Requested On: 04-JAN-2008	Lewis, Miss Sarah
Funding request 900011604500011819500012056 requires Approval Requested On: 04-JAN-2008	Rathore, Mr. Bharat
Funding request 900011604500011819500012056 requires Approval Requested On: 04-JAN-2008	Singh, Mr. Shalendra

Below the Return Assets table is another table titled "Latest Open Period":

Module	Period
Assets	JAN-08
General Ledger	JAN-08
Lease Management	JAN-08
Payables	JAN-08
Receivables	JAN-08

Setting up Approval dashboard -> 4 step Process

**Example used are from Oracle Lease management (OLM) workflows.

1 Query below shows any Funding,Booking,re-booking (can be any workflow that you want to track) that were requested by the user who has logged in & who the approval is waiting for. Generic Dash board can be created for system administrator to be able to see all workflows pending approval.

2 Setup Declarative component on CRM HTML Administration responsibility

The screenshot shows the Oracle CRM HTML Administration Declarative Components page. The navigation bar includes: Page Flows, Declarative Components, Homepage, Home, Settings, Deployment, Diagnostics, Performance, Integration, Design, and Users.

The page title is "Application Components". There is a search area with the following fields:

- Application: Lease Management - OKL
- Component Type: All
- Component Code: [input field] [Go] [Create]

Below the search area is a table listing the components:

Action	Component Code	Component Name	Component Type	Preview
Enabled	OKL_CONTRACTS_BY_MONTHS	OKL Contracts in Current Year	Graph	Preview
Enabled	OKL_CONTR_BY_STATUS	OKL Contracts by Status	Report	Preview
Enabled	OKL_DISBURSEMENT	OKL Income Vs. Funding	Graph	Preview
Enabled	OKL_OPEN_PERIOD	OKL Latest Open Period	Bin	Preview
Enabled	OKL_PENDING_WORKFLOW	OKL Workflow pending approval	Bin	Preview
Enabled	OKL_REEST_QUOTES	OKL Restructure Quotes	Bin	Preview
Enabled	OKL_RETURN_ASSETS	OKL Return Assets by Status	Bin	Preview
Enabled	OKL_TERM_QUOTE	OKL Termination Quotes	Bin	Preview
Enabled	OKL_UNAPP_RECEIPTS	OKL Unapplied Receipts	Report	Preview

- Introduction
- Components
- Component Security

Component Registration

*Application: Lease Management - OKL *Component Type: Report

*Component Code: OKL_PENDING_WORKFLOW1 Component Sub Type Matrix:

*Component Name: OKL_PENDING_WORKFLOW

Description: OKL_PENDING_WORKFLOW

Enable? Show as Portlet:

Image Filename:

Metadata Source

*Type: AK * Indicates required field.

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Component Metadata

Component Code: OKL_PENDING_WORKFLOW1 Component Type: Report

Pre-Process

Type: Name:

Data Source Provider

*Type: SQL Query

*Code:

```
select subject || 'Requested On : ' || Trunc(begin_date)
Request, Recipient Approver
from OKL_WORKFLOW_RECIPIENT
```

Custom Edit Link

Type: Name:

Title

Type: Constset Name: Pending Approvals

Personalizable:

Header

Type: Name:

Personalizable:

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Component Columns

Component Name: OKL_PENDING_WORKFLOW1 Component Type: Report

Allow Personalization?

Number of Rows Number of Columns

Action	Component Columns	Description	Display Order
Enabled	REQUEST		1
Enabled	APPROVER		2

1-2 of 2

Page Flows | Declarative Components | Homepage

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Bin Column Details

Component Name: OKL_PENDING_WORKFLOW Component Type: Bin

*Column Name: REQUEST Description:

*Display Order:

Label

*Type: Constant

*Method: Request

Horizontal Alignment: Center

Raw Column?

URL:

ID Column:

Low Watermark Value: High Watermark Value:

Update Restore Component Columns

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Report Column Details

Component Name: OKL_PENDING_WORKFLOW1 Component Type: Report

*Column Name: APPROVER Description:

*Display Order:

Label

*Type: PL/SQL

*Method: Approver

Horizontal Alignment: Center

Raw Column?

URL: mailto:APPROVER@igs.com?subject=request?body=request|Regards

ID Column: APPROVER

Low Watermark Value: High Watermark Value:

Update Restore Component Columns

* Need to finalize URL so that email can be send to approver,with request details in subject & body of the email (nice to have feature)

3 Assign Dashboard bin to required responsibilities

Page Flows | Declarative Components | Homepage

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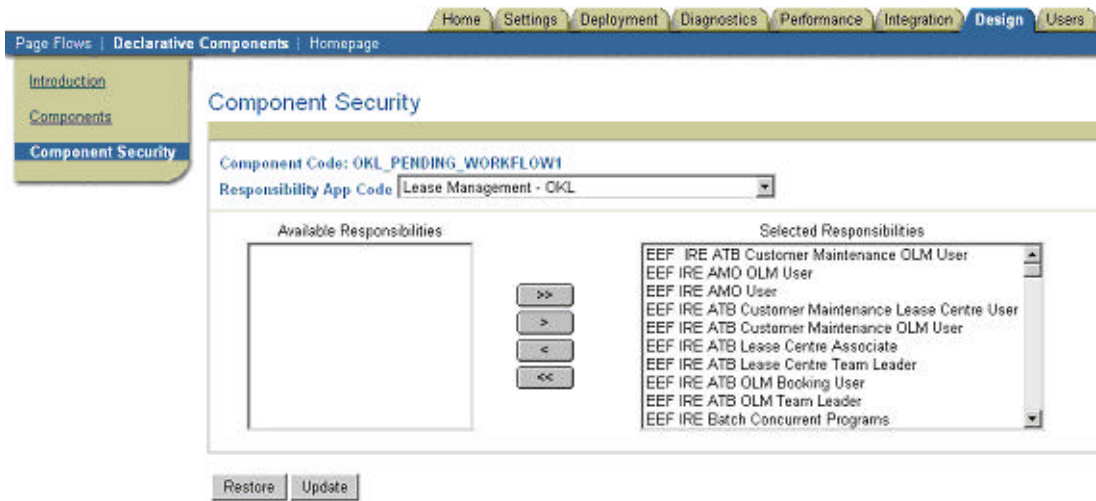
Component Security

Assign Component to Responsibilities

*Application Code: Lease Management - OKL

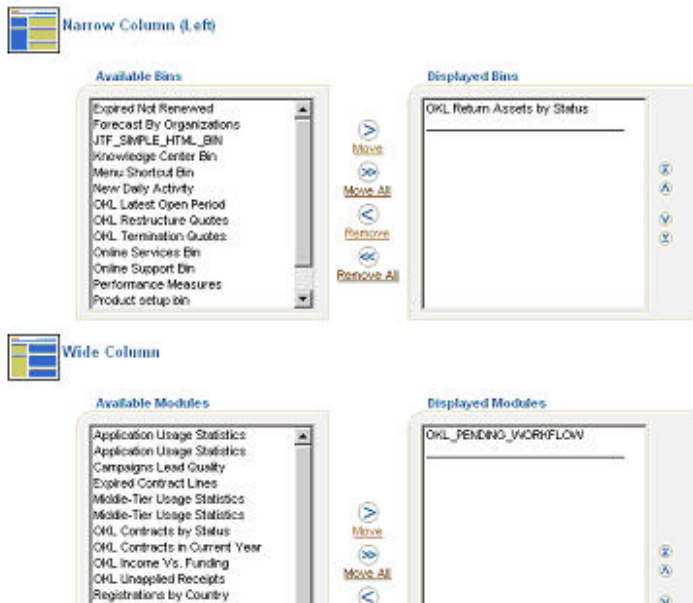
*Component Code: OKL_PENDING_WORKFLOW1

Next



4 Personalize Home Page to show Workflow approval dash board

Personalize Your Homepage



Query to Be used (create view on the query provided by extension to make it easier to define OKL_PENDING_WORKFLOW bin in step1 (Query below is just an example of how?,Write this query for workflows that you need to track.)

```
CREATE OR REPLACE VIEW OKL_WORKFLOW_RECIPIENT AS
```

```
SELECT      wf.notification_id, /* For Funding Approval */
            wiav2.item_type, -wf.message_type,
            wiav2.item_key, --wias.item_key,
            wf_notification.getsubject (wf.notification_id) Subject,
            wiav2.text_value funding_number,
            wiav.text_value Requestor,
            wf.recipient_role,
            nvl(wf.recipient_role_name, fu.description) Recipient,
```

```

wf.status StatusCode,
wf.priority Priority,
wf.begin_date,
wf.end_date,
wf.due_date,
wf.user_comment,
wf_notification.getshortbody (wf.notification_id) Message
FROM apps.WF_NOTIFICATIONS_VIEW wf, apps.wf_item_activity_statuses wias,
apps.wf_item_attribute_values wiav, apps.wf_item_attribute_values wiav1,
apps.wf_item_attribute_values wiav2, apps.fnd_user fu
WHERE fu.user_name = wf.recipient_role AND wf.status = 'OPEN'
AND wiav.name in ('REQUESTER', 'REQUESTOR') AND wias.activity_status = 'NOTIFIED'
AND wias.item_key = wiav.ITEM_KEY AND wias.item_type = wiav.ITEM_TYPE
AND wiav1.NAME= 'PARENT_ITEM_KEY' AND wiav1.ITEM_KEY = wias.item_key
AND wiav2.ITEM_KEY = wiav1.text_value AND wiav2.NAME = 'FUNDING_NUMBER'
AND wf.group_id (+) = wias.notification_id
AND trunc(wf.begin_date) > to_date('28/08/2006','DD/MM/YYYY')
AND wiav2.ITEM_TYPE = 'OKLLAFUN' AND wiav1.item_type = 'XXXOKLAPP'
AND wiav.item_key like 'XXOKLAPP%' AND wiav1.item_key like 'XXOKLAPP%'
UNION
SELECT wf.notification_id, /* For Termination Quotes */
wiav2.item_type,
wiav2.item_key,
wf_notification.getsubject (wf.notification_id) Subject,
wiav2.text_value quote_number,
wiav.text_value Requestor,
wf.recipient_role,
nvl(wf.recipient_role_name, fu.description) Recipient,
wf.status StatusCode,
wf.priority Priority,
wf.begin_date,
wf.end_date,
wf.due_date,
wf.user_comment,
wf_notification.getshortbody (wf.notification_id) Message
FROM apps.WF_NOTIFICATIONS_VIEW wf, apps.wf_item_activity_statuses wias,
apps.wf_item_attribute_values wiav, apps.wf_item_attribute_values wiav1,
apps.wf_item_attribute_values wiav2, apps.fnd_user fu
WHERE fu.user_name = wf.recipient_role
AND wf.status = 'OPEN'
AND wiav.name in ('REQUESTER', 'REQUESTOR') AND wias.activity_status = 'NOTIFIED'
AND wias.item_key = wiav.ITEM_KEY AND wias.item_type = wiav.ITEM_TYPE

```

```

AND wiav1.NAME= 'PARENT_ITEM_KEY' AND wiav1.ITEM_KEY = was.item_key
AND wiav2.ITEM_KEY = wiav1.text_value AND wiav2.NAME = 'QUOTE_NUMBER'
AND wf.group_id (+) = was.notification_id
AND trunc(wf.begin_date) > to_date('28/08/2006','DD/MM/YYYY')
AND wiav2.ITEM_TYPE = 'OKLAMNQT' AND wiav1.item_type = 'XXOKLAPP'
AND wiav.item_key like 'XXOKLAPP%' AND wiav1.item_key like 'XXOKLAPP%'

```

UNION

```

SELECT      wf.notification_id, /* For Booking and rebooking approvals */

```

```

    wiav2.item_type,
    wiav2.item_key,
    wf_notification.getsubject (wf.notification_id) Subject,
    wiav2.text_value contract_number,
    wiav.text_value Requestor,
    wf.recipient_role,
    nvl(wf.recipient_role_name, fu.description) Recipient,
    wf.status StatusCode,
    wf.priority Priority,
    wf.begin_date,
    wf.end_date,
    wf.due_date,
    wf.user_comment,
    wf_notification.getshortbody (wf.notification_id) Message

```

```

FROM      apps.WF_NOTIFICATIONS_VIEW wf, apps.wf_item_activity_statuses was,
          apps.wf_item_attribute_values wiav, apps.wf_item_attribute_values wiav1,
          apps.wf_item_attribute_values wiav2,apps.fnd_user fu

```

```

WHERE      fu.user_name = wf.recipient_role AND wf.status = 'OPEN'
          AND wiav.name in ('REQUESTER', 'REQUESTOR')
          AND was.activity_status = 'NOTIFIED' AND was.item_key = wiav.ITEM_KEY
          AND was.item_type = wiav.ITEM_TYPE
          AND wiav1.NAME= 'PARENT_ITEM_KEY'
          AND wiav1.ITEM_KEY = was.item_key AND wiav2.ITEM_KEY = wiav1.text_value
          AND wiav2.NAME = 'CONTRACT_NUMBER'
          AND wf.group_id (+) = was.notification_id
          AND trunc(wf.begin_date) > to_date('28/08/2006','DD/MM/YYYY')
          AND wiav2.ITEM_TYPE = 'XXOKLAAPP' AND wiav1.item_type = 'XXOKLAPP'
          AND wiav.item_key like 'XXOKLAPP%' AND wiav1.item_key like 'XXOKLAPP%'

```

AND

UNION

```

SELECT      wf.notification_id, /* For Credit Memo approvals */

```

```

    wiav2.item_type,
    wiav2.item_key,
    wf_notification.getsubject (wf.notification_id) Subject,
    wiav2.text_value Invoice_number,

```

```

    wiav.text_value Requestor,
    wf.recipient_role,
    nvl(wf.recipient_role_name, fu.description) Recipient,
    wf.status StatusCode,
    wf.priority Priority,
    wf.begin_date,
    wf.end_date,
    wf.due_date,
    wf.user_comment,
    wf_notification.getshortbody (wf.notification_id) Message
FROM    apps.WF_NOTIFICATIONS_VIEW wf,apps.wf_item_activity_statuses wias,
        apps.wf_item_attribute_values wiav,apps.wf_item_attribute_values wiav1,
        apps.wf_item_attribute_values wiav2,apps.fnd_user fu
WHERE   fu.user_name = wf.recipient_role
        AND wf.status = 'OPEN' AND wiav.name in ('REQUESTER', 'REQUESTOR')
        AND wias.activity_status = 'NOTIFIED' AND wias.item_key = wiav.ITEM_KEY
        AND wias.item_type = wiav.ITEM_TYPE AND wiav1.NAME= 'PARENT_ITEM_KEY'
        AND wiav1.ITEM_KEY = wias.item_key AND wiav2.ITEM_KEY = wiav1.text_value
        AND wiav2.NAME = 'INVOICE_NUMBER' AND wf.group_id (+) = wias.notification_id
        AND trunc(wf.begin_date) > to_date('28/08/2006','DD/MM/YYYY')
wiav2.ITEM_TYPE = 'XXOKLCSCRM' AND wiav1.item_type = 'XXOKLAPP'
        AND wiav.item_key like 'XXOKLAPP%' AND wiav1.item_key like 'XXOKLAPP%'
AND

```