

Oracle® Fusion Middleware
User's Guide for Oracle Document Routing
and Approval Process Accelerator
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Oracle Document Routing and Approval Process Accelerator

Oracle Fusion Middleware User's Guide for Oracle Document Routing and Approval Process Accelerator describes how to administer and use this process accelerator.

Audience

This document is intended for:

- Document owners who use Oracle Document Routing and Approval to submit documents for approval
- Approvers who use Oracle Document Routing and Approval to disposition documents
- Administrators who maintain Oracle Document Routing and Approval drop-down lists, business rules, and reports

Within this guide, the term *disposition* means an approver's ability to approve, reject, or request a change to a document owner's submitted document.

Related Documents

For more information, see the following Oracle resources:

Oracle Document Routing and Approval Process Accelerator

- *Oracle Fusion Middleware Installation Guide for Oracle Process Accelerators*

Oracle Business Process Management Suite

- *Oracle Fusion Middleware User's Guide for Oracle Business Process Management*
- *Oracle Fusion Middleware Modeling and Implementation Guide for Oracle Business Process Management*
- *Oracle Fusion Middleware Business Process Composer User's Guide for Oracle Business Process Management*
- *Oracle Fusion Middleware Administrator's Guide for Oracle SOA Suite and Oracle Business Process Management Suite*

Oracle Business Rules

- *Oracle Fusion Middleware User's Guide for Oracle Business Rules*

Oracle WebCenter Content

- *Oracle WebCenter Content System Administrator's Guide for Content Server*

Oracle Fusion Middleware

- *Oracle Fusion Middleware Administrator's Guide*

Conventions

The following text conventions are used in this document:

- **boldface** - Boldface type indicates graphical user interface elements or terms defined in text.

- *italic* - Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.

Overview of Oracle Process Accelerators

Introduction

Oracle Process Accelerators are process solutions, developed by Oracle, which address common business processes or high-value industry processes. Oracle Process Accelerators have been developed to simplify and improve the management of these processes. Many low-priority business processes, such as managing travel approvals, are managed manually or through email and can negatively impact organizations by contributing to inefficiency and reduced productivity. In addition, there are complex business processes, some common to all organizations, and others specific to a particular industry, which benefit from the process management approach which Oracle Business Process Management (BPM) provides. Automated process management solutions enable organizations to become more efficient, to meet business challenges rapidly and flexibly, and ultimately to improve customer satisfaction by supporting employees in fulfilling requirements in a timely fashion.

Key Elements

Oracle Process Accelerators, developed with Oracle BPM Suite 11g, make the following capabilities available to organizations implementing automated solutions to improve process management:

- **Role-Based Employee Access** - Processes are performed by people in the organization who do the work. When the employees are assigned to roles in the Oracle Process Accelerator, they have access to only those tasks in a process for which they are responsible. Multiple employees can be assigned to a role. Any one of them can select a task to get the job done.
- **Sequenced Tasks** - The work to be done is defined as a sequence of tasks, each performed by a role. After a task is completed, the solution automatically moves on to the next task. This is referred to as *workflow*. The sequence of tasks can branch into two or more paths depending on the outcome of a previous task. Note that some tasks require employee or user interaction, while some are automated. User tasks can be as common as clicking a button to approve a request, or as specific as entering an order with multiple line items.
- **Automated Task Lists** - When an employee logs in to an Oracle Process Accelerator, he is presented with a task list containing the work assigned to all of the roles he is responsible for. By selecting a task, the employee is guided to the appropriate application form, which prompts for the correct actions to be performed. After the actions are complete, the task disappears from the task list, and a new task is created for the role responsible for the subsequent task.
- **Business Rules** - Oracle BPM provides flexible business rules which can be defined to meet organizational guidelines. These rules are defined to support a specific process, and govern the way the process is carried out. For example, in a specific process, a request for management approval might require two levels of approval if an employee is grade four or lower, but only one level if grade three or higher.
- **Process Dashboards** - A useful component of Oracle Process Accelerators is the process dashboard reporting developed with Oracle Business Activity Monitoring (BAM). These reports provide real time process analytics which can be used to observe key performance indicators, and to monitor the efficiency of the process itself.

The Business Process Diagram

In the introduction to each Oracle Process Accelerator, a business process diagram shows the process being automated using the Business Process Modeling Notation (BPMN). For those unfamiliar with BPMN, the Sample Business Process Diagram provides an example.

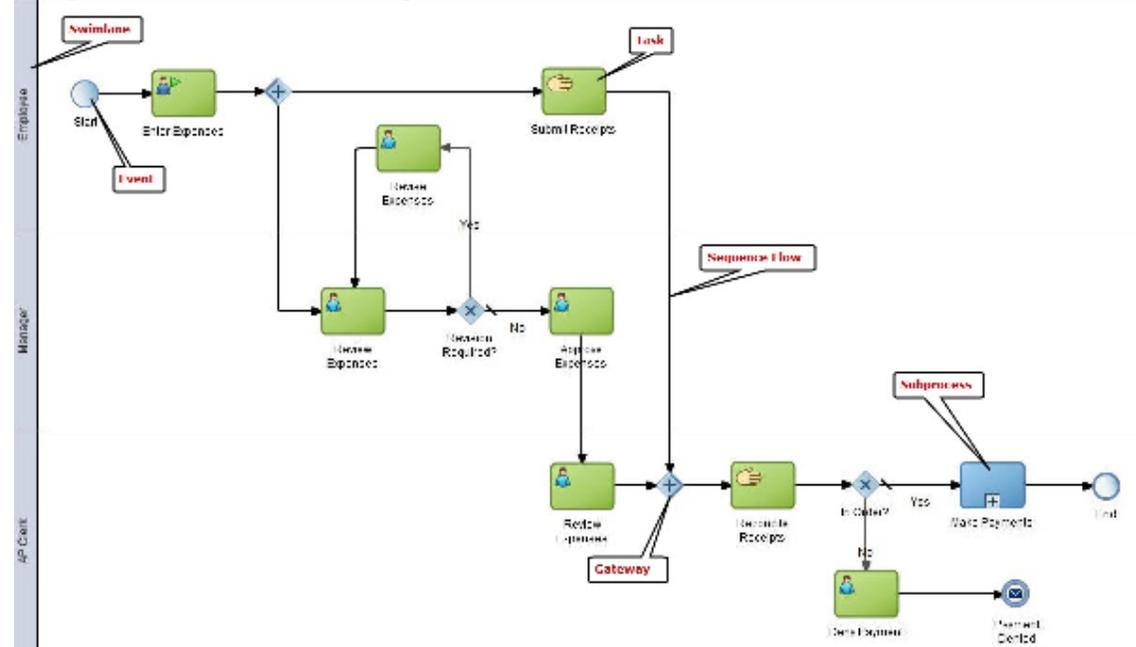
The process diagram contains the following elements. If you are not familiar with this type of diagram, study the elements and then follow the diagram to understand the process.

- **Swimlanes** (Employee, Manager, AP Clerk) - contain roles that indicate who is responsible for the tasks in the lanes.

- **Events** (Start, End) - show where the process begins and ends.
- **Tasks** (Enter Expenses, Deny Payment) - identify the action being taken.
- **Sequence flows or arrows** - show the path to the next task.
- **Gateways** (Revision Required, In Order) - are diamond shapes indicating a branch in the path. In the sample diagram a parallel gateway (a + in the diamond), shows that both branches must be taken, and an exclusive gateway (an X in the diamond), indicates that only one path can be taken.
- **Subprocesses** (Make Payments) - indicate that another set of tasks has been collapsed for clarity.

For more information about BPMN, see "Overview of Business Process Design," in *Oracle Fusion Middleware Modeling and Implementation Guide for Oracle Business Process Management*.

Sample Business Process Diagram



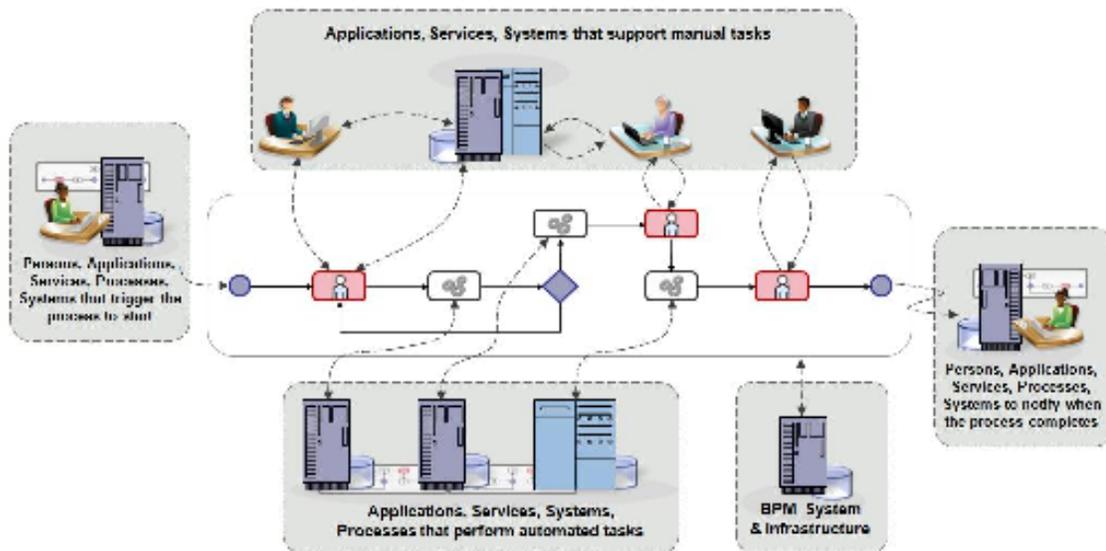
Why Oracle Process Accelerators

An organization engaged in automating critical high-value processes with Oracle BPM Suite can benefit from the implementation of Oracle Process Accelerators. These pre-built solutions supplement the benefits of Oracle BPM Suite in these ways:

- **Consensus Building** - Using these pre-built processes, the IT organization can illustrate the advantages of process-driven applications, to show the value of process automation to the business community.
- **Best Practice** - A best practice guideline based on the accumulated experience and expertise of Oracle developers and implementers is provided with Oracle Process Accelerators. These best practices mitigate the risk associated with learning and deploying a new technology. The guide includes development methodologies, process modeling approaches, effective tool use techniques, and sample deployment plans. Oracle uses these best practices to build the Oracle Process Accelerators.
- **Rapid Deployment** - The Oracle Process Accelerators can be implemented as is or extended to meet specific requirements. In either scenario, there is a significant reduction of effort.

- Build a Process Centric Organization** - Clearly, an organization will not be using Oracle BPM and Oracle Process Accelerators to computerize a small set of common business processes. It is highly likely that a critical value-add process that provides a market differentiation is being automated to improve customer satisfaction or reduce costs. While the more significant project is underway, the business community can start to learn how to use process driven applications to their benefit. By rolling out Oracle Process Accelerators, the organization gets a head start with the new paradigm. If multiple Oracle Process Accelerators are deployed, the management community begins to learn that process automation reduces the overhead associated with handling mundane tasks. The implementing organization has the opportunity to win a quick victory with the new technology, and the business users learn the value of managing tasks through accurately routed processes. The organization as a whole begins to appreciate the benefits of becoming process-centric. The Sample Functional Architecture for Oracle Process Accelerators diagram depicts how the Oracle Process Accelerators can be used in an organization.

Sample Functional Architecture for Oracle Process Accelerators



Getting Started With Oracle Document Routing and Approval

This section is intended for new Oracle Document Routing and Approval (DRA) users who want a brief introduction.

Upon completion of this section, you will be able to:

- Describe the basic Oracle Document Routing and Approval process lifecycle.
- Describe Oracle Document Routing and Approval pages and related Oracle Business Process Management Workspace pages.
- Start Oracle Document Routing and Approval.

Overview of Oracle Document Routing and Approval Process Lifecycle

Oracle Document Routing and Approval Request (DRA) Process Accelerator is a process solution that enables organizations to submit, approve, and track document approval requests using document categories which drive standard routings.

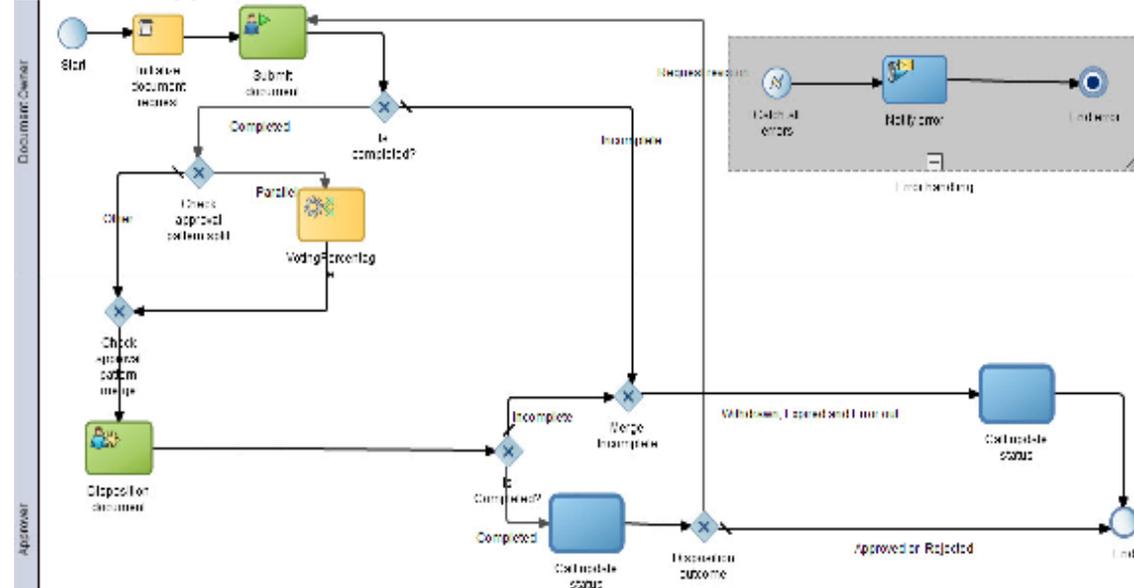
Oracle DRA provides dashboards to view process analytic and document approval request summary reports. Administrators can modify the business rule and the drop-down lists.

Oracle DRA is a role-based solution; your role determines the tasks you can perform. Oracle DRA delivers the following roles:

- The document owner submits document approval requests.
- The approver disposes the requests.

The Document Approval Process is the main business process for Oracle DRA, and the focus of this topic. Because Document Approval Process is a top-level process, it consists of inline and callable subprocesses. The Document Approval Process diagram is depicted as follows, with an explanation of the process.

Document Approval Process



The Document Approval Process involves a document owner submitting a document approval request. During the Submit document task, the owner selects a standard document type which defines the routing approach (serial or parallel) and the roles or users who must approve the

document. Changes to standard routings and ad hoc requests are also provided for. The document approval request is then routed to the document approvers.

If the document routing is serial, the document is routed to the first approver on the list. If that approver disposes the document by approving, it then moves to the next approver on the list. The process continues until all approvers have approved the document, or until it is either rejected or an approver requests a revision.

If the document routing is parallel, the document is routed to all approvers at the same time. Based on the voting rule, if every approver approves the document, the document is approved. If even one approver rejects or requests a change to the document, the document is not approved. If a document is rejected or a change requested, the document owner receives an email notification. If a change is requested, the document owner may choose to revise the document and resubmit the approval request for disposition.

This topic walks through the Document Approval Process illustrating how a document owner submits a document approval request and an approver approves the document approval request.

Procedure: Overview of Oracle Document Routing and Approval Process Lifecycle

1. The document owner begins by navigating to the **Submit document for approval** page.
2. The document owner uses the **Submit document for approval** page to attach a document for approval and submit the request.
3. The document owner completes all required fields pertaining to the approval request.
4. The document owner clicks the **Submit** button. The **Submit** button saves and submits the document approval request to the persons listed in the **Approvers** field based on the routing pattern.
5. If a serial request, the first approver in the list receives an email notification. After he approves, the next approver receives an email notification.

If a parallel request, all approvers in the list receive an email notification.

This is a sample email notification.

6. The approver uses the **My Tasks** page to disposition the document approval requests.
7. The approver double-clicks the task link to open the document approval request.
8. The approver reviews the attached document and clicks the **Approve** button to approve the document approval request.
9. You have completed the **Overview of Oracle Document Routing and Approval Request Process Accelerator** topic.

Understanding Oracle Document Routing and Approval Pages

Oracle Document Routing and Approval (DRA) runs on Oracle Business Process Management Workspace. Your role within Oracle DRA determines the tasks you can perform, and the pages you can access. Some of these pages are Oracle Business Process Management Workspace, others are Oracle DRA. Understanding the pages associated to a task or a role makes you more effective in your use with Oracle DRA.

This topic addresses the various Oracle Business Process Management Workspace and Oracle DRA pages you use.

Procedure: Understanding Oracle Document Routing and Approval Pages

1. The Oracle Business Process Workspace **Tasks** tab appears after you log into Oracle Business Process Management Workspace. This is an Oracle Business Process Management Workspace page.

From here you can:

- Take action on a document approval request by executing the tasks assigned to you in **Views, My Tasks**
- Access Oracle DRA from **Applications** link

2. The **DocumentRoutingandApprovalProcess** link is visible if you are granted permissions in Oracle DRA. Use this link to access the **Submit document for approval** page.
3. Use the **Submit document for approval** page to attach a document and submit an approval request. This is an Oracle Document Routing and Approval page.
4. The **Maintain Document Categories** link is available under **Links** if you are granted permissions in Oracle DRA. Use this link to access the administration pages.
5. Use the **Maintain Document Category** page to modify the document category options made available when submitting a document approval request. This is an Oracle Document Routing and Approval administration page.

This page is blank unless you have administrator rights.

6. The Oracle Business Process Workspace **My Tasks** page displays revision requests a document owner receives from approvers when logged in with a document owner role.

The **My Tasks** page displays the document approval requests an approver needs to disposition when logged in with a document approver role. This is an Oracle Business Process Management Workspace page.

7. For more information on how to work with tasks, such as reassigning a task, routing a task, or setting a vacation period, see "Working on Tasks in Process Workspace," in *Oracle Fusion Middleware User's Guide for Oracle Business Process Management*.
8. For more information on understanding, navigating, and setting your preferences in Oracle Business Process Workspace, see "Getting Started with Process Workspace," in *Oracle Fusion Middleware User's Guide for Oracle Business Process Management*.
9. You have completed the **Understanding Oracle Document Routing and Approval Pages** topic.

Starting Oracle Document Routing and Approval

Oracle Document Routing and Approval (DRA) runs on Microsoft Internet Explorer 8.0 (or later), Chrome 11.x, or Mozilla Firefox 4.x (or later). You need a valid Oracle Business Process Management Workspace URL, user ID, and password to access Oracle DRA. Contact your system administrator for the URL and your login credentials.

In this topic, you will log into Oracle Business Process Management Workspace and access Oracle Document Routing and Approval.

Procedure: Starting Oracle Document Routing and Approval

1. To begin, enter **http://server name:port/bpm/workspace** in your web browser.

Replace server name and port with the server name and port number you received from your administrator.

The Oracle Business Process Workspace **Sign In** page opens.

2. Enter your username and password in the respective fields, then click **Login**.
3. You are now logged into Oracle Business Process Management Workspace.
4. Click the **Applications** link to access any Oracle Process Accelerator, implemented by your organization and that you have permissions to.
5. Use the **DocumentRoutingandApprovalProcess** link to access Oracle Document Routing and Approval.
6. You have completed the **Starting Oracle Document Routing and Approval** topic.

Using Oracle Document Routing and Approval

This section is intended for document owners who submit and manage document approval requests and approvers who disposition document approval requests. Upon completion of this section you will be able to:

- Submit a document approval request.
- Withdraw a document approval request.
- Disposition a document approval request.
- Revise a document approval request.

Submitting a Document for Approval

Imagine you just completed writing a white paper; you want a co-worker's approval before posting it to your organization's web site. You can use Oracle Document Routing and Approval to submit a document approval request to your co-worker, requesting approval for your white paper.

In this topic, you will submit a document approval request.

Procedure: Submitting a Document for Approval

1. Begin by navigating to the **Submit document for approval** page.

Click the [DocumentRoutingandApprovalProcess](#) link.

2. Use the **Submit document for approval** page to attach a document for approval and submit the request.

The screenshot shows a web form titled "Submit document for approval". The form is divided into several sections:

- Document Details:** Includes fields for "Document" (with a file upload icon), "Objective" (with a text area), "Priority" (set to 3), and "Target Audience".
- Document Category:** Includes a "Category" dropdown menu, "Due Date" (with a calendar icon), "Routing Pattern" (with a dropdown menu), and "Approvers" (with a list of icons for adding, removing, and ordering).
- Approvers Table:** A table with columns for "Name" and "Type".
- Comments:** A section with a "Comments" header and a text area containing "No data to display".

The form has a "Submit" button in the top right corner and a "Actions" dropdown menu next to it.

3. Attach a document to this document approval request.

Note: All fields with an **Asterisk** (*) are required.

Click the **Add** button.

4. Use the **Add Attachment** dialog box to attach a document to your document approval request.

Create a separate document approval request for each document needing approval.

5. Each attachment type requires different information to be completed.

Oracle Document Routing and Approval uses Oracle WebCenter Content (OWC) as the document repository. Follow the folder structure usage guidelines developed by your organization.

For this example, select a file from OWC.

Click the **Associate Webcenter Content document** option.

6. Click the **Search** button.
7. Use the **Search and select document ID** dialog box to search for the document you want to attach to this request.
8. Enter search criteria, click **Search**, and then select the document you want to attach. In this example, the document is selected for you.

Click the **OK** button.

9. Click the **OK** button.
10. The **review.txt** document is attached to the document approval request.
11. Click in the **Objective** field.
12. Enter the desired information into the **Objective** field. Enter "**Obtain approval for content.**".
13. The **Priority** field automatically populates when the **Submit document for approval** page opens.

By default, the priority level is set to 3. You can change this value if you require a different priority. Values range from 1 to 5, highest to lowest.

14. Click the **Category** list.
15. The **White paper** category has been added for this example.

Click the **White Paper** list item.

16. The **Due Date, Routing Pattern, and Approvers** values automatically populate based on the **Category** field. You can change the values in these fields if permitted by your administrator.

The **Adhoc** category leaves the **Approvers** field blank, requiring you to complete.

17. There are two types of routing patterns, **parallel** and **serial**.

Parallel routing sends the document approval request to all approvers in the **Approvers** field, at the same time.

Serial routing sends the document approval request to each approver in the **Approvers** field, in order as they are listed.

18. Next, add an additional approver.

Click the **Add** button.

19. Use the **Search users, groups, roles** dialog box to add an additional approver to your document approval request.

20. Enter search criteria, click **Search**, and then select the user you want to approve this request. In this example, the approver is selected for you.

Click the **OK** button.

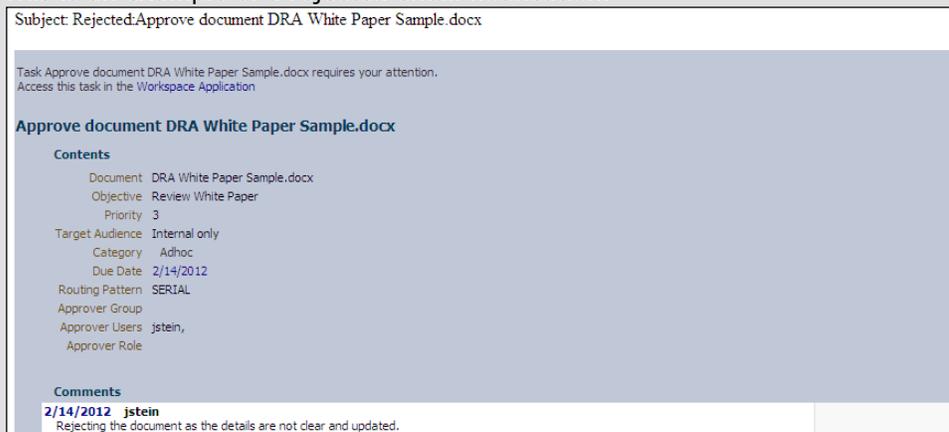
21. Use the **Submit** button to submit the document approval request to your approvers for review and approval.

Click the **Submit** button.

22. After a document approval request is submitted, you receive an email notification for any of the following situations:

- A processing error
- An approver rejects your request
- An approver requests a revision

This is an example of a rejected email notification.



23. This is an example of an email notification your approvers receive when you submit a document approval request.

If the request is a serial request, then the first approver in the list receives an email notification. After he approves the request, the next approver receives an email notification.

If the request is a parallel request, then all approvers in the list receive an email notification.

Subject: Approved:Approve document DRA White Paper Sample.docx

Task Approve document DRA White Paper Sample.docx requires your attention.
Access this task in the Workspace Application

Approve document DRA White Paper Sample.docx

Contents

- Document DRA White Paper Sample.docx
- Objective Review White Paper
- Priority 5
- Target Audience Internal only
- Category Adhoc
- Due Date 2/14/2012
- Routing Pattern SERIAL
- Approver Group
- Approver Users jcooper,jstein,
- Approver Role

Comments

No data to display

24. You have completed the **Submitting a Document for Approval** topic.

Withdrawing a Document Approval Request

You submit a document approval request to your co-worker for a request for pricing document. Two days later, you receive notice that the deadline for issuing the request for pricing document to the vendor is expired. With the deadline expired, you want to withdraw the document approval request. Document approval requests can be withdrawn after submission, prior to, or after an approver has requested a change.

In this topic, you will withdraw a document approval request.

Procedure: Withdrawing a Document Approval Request

1. Begin by navigating to the **Initiated Tasks** tab.

Click the **Initiated Tasks** link.

2. Use the **Initiated Tasks** page to view and take action on submitted document approval requests.

Number	Creator	Assigned	Priority	Process
200105	James Cooper	Jun 4, 2013 1:26 PM	3	DocumentRoutingand
200104	James Cooper	Jun 4, 2013 1:26 PM	3	DocumentRoutingand

3. Select the document approval request task you want to withdraw.

Click on the task to open it in the **Task Details** section. Double-click the task to open in a new window. In this example, you will click on the task.

Click the **Task** object.

4. Click the **Actions** menu.
5. Click the **Withdraw** list item.

6. After you withdraw a document approval request it disappears from your **Initiated Tasks** list.

An email notification is sent to approvers who have not already dispositioned the request.

7. You have completed the **Withdrawing a Document Approval Request** topic.

Dispositioning a Document Approval Request

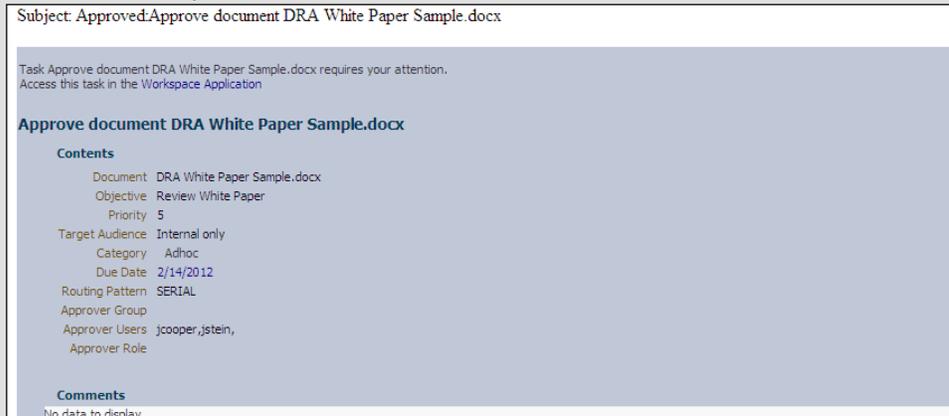
A document owner submits a document approval request. You as an approver, must disposition the request. You log into Oracle Document Routing and Approval and disposition the document approval request by approving, rejecting, or requesting a change to the document approval request.

In this topic, you will disposition a document approval request.

Procedure: Dispositioning a Document Approval Request

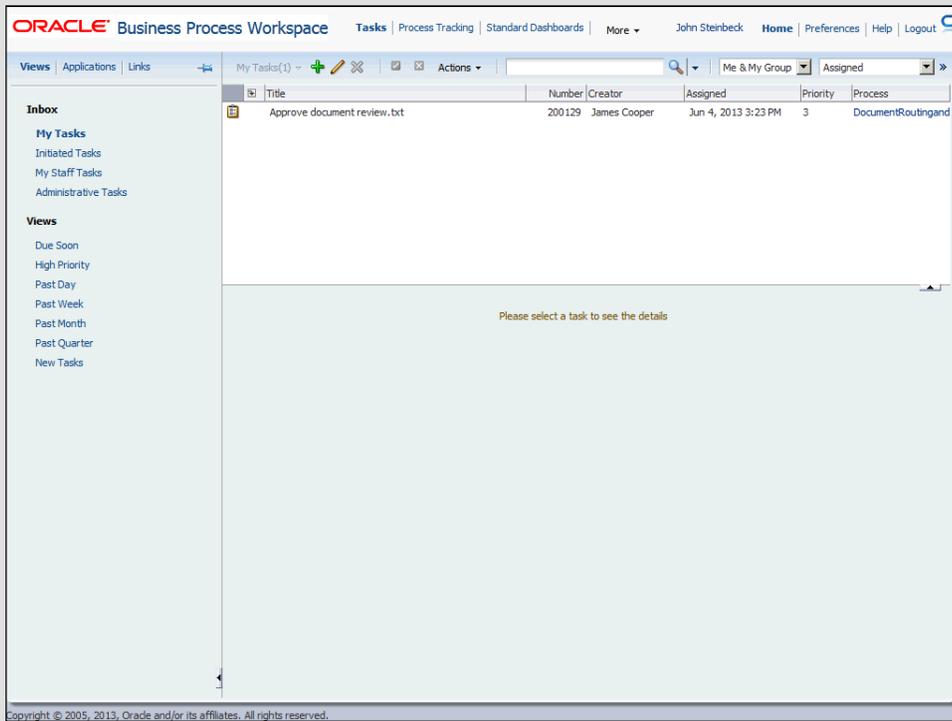
1. You will receive an email notification when you have document approval requests to disposition.

This is an example of an email notification.



2. Use the **My Tasks** page to view all document approval requests you have to disposition.

The **My Tasks** page automatically opens after you log into Oracle Business Process Management Workspace.

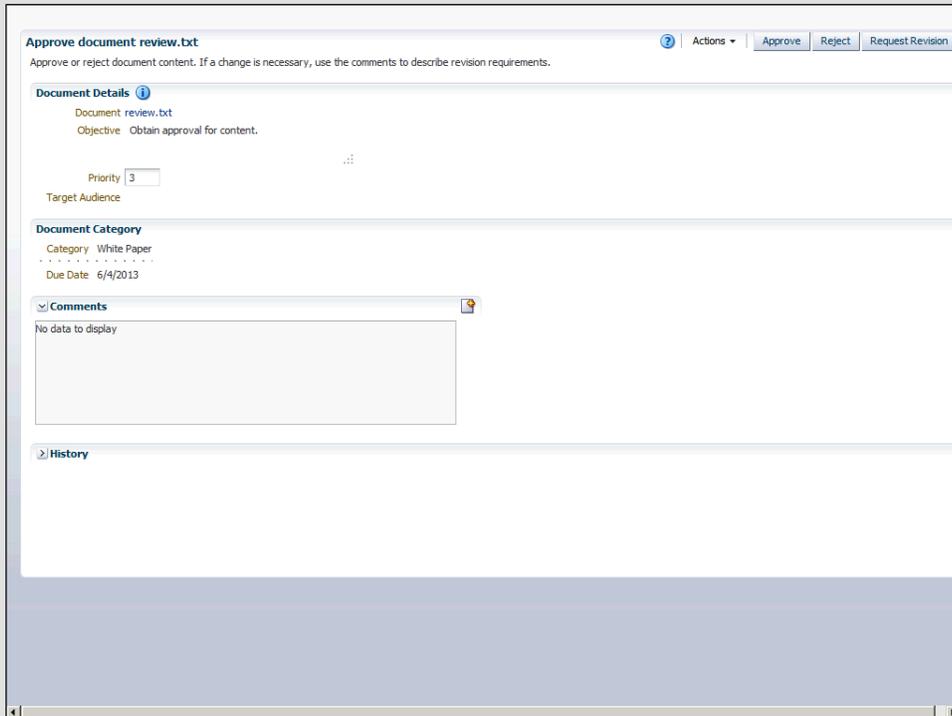


3. Select the document approval request task you want to disposition.

Click on the task to open it in the **Task Details** section. Double-click the task to open in a new window. In this example, you will double-click on the task.

Double-click the **Task** object.

4. Use the **Document** link to view the document.



5. You are going to disposition this document approval request by requesting a change.

A comment is required when rejecting or requesting a change to a document approval request.

Click the **Create** button.

6. Enter the desired information into the **Comment** field. Enter "**Rewrite paragraph 2 on page 3.**".

7. Use the **Share with** options to specify who should see your comment.

Use the **Only task participants** option to allow only the approvers to view the comment.

Use the **All process participants** option to allow the submitter and approvers to view the comment. This is the default option.

8. Use the default **Share with** option.

Click the **OK** button.

9. Use the **History** link to view the routing for this document approval request.

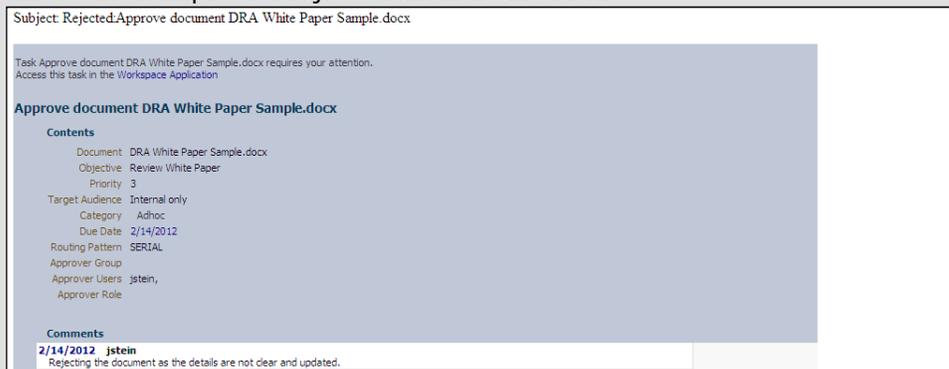
Click the **Expand History** button.

10. Use the **Request Revision** button to request a change to the document.

Click the **Request Revision** button.

11. A rejection or request for change results in the document owner receiving an email notification of the documents status.

This is an example of a rejected email notification.



12. After you disposition a document approval request, it disappears from your task list.

13. You have completed the **Dispositioning a Document Approval Request** topic.

Revising a Document Approval Request

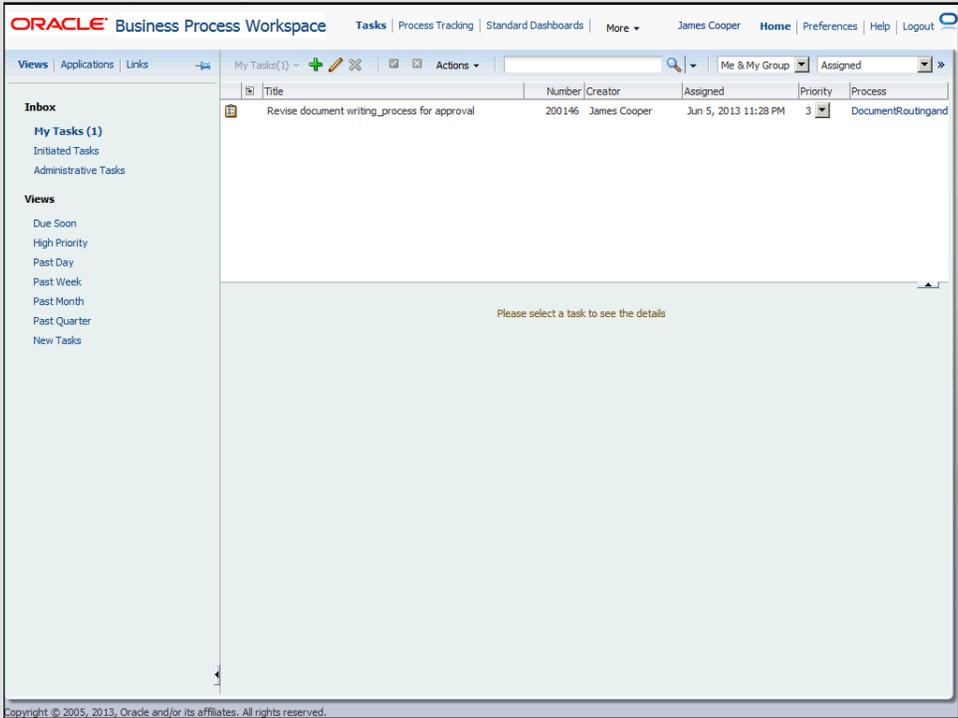
Before your co-worker approves your document approval request, he's requesting you make a change to a portion of your document.

In this topic, you will revise a document approval request.

Procedure: Revising a Document Approval Request

1. Use your **My Tasks** page to revise a document approval request your co-worker has

requested you change.

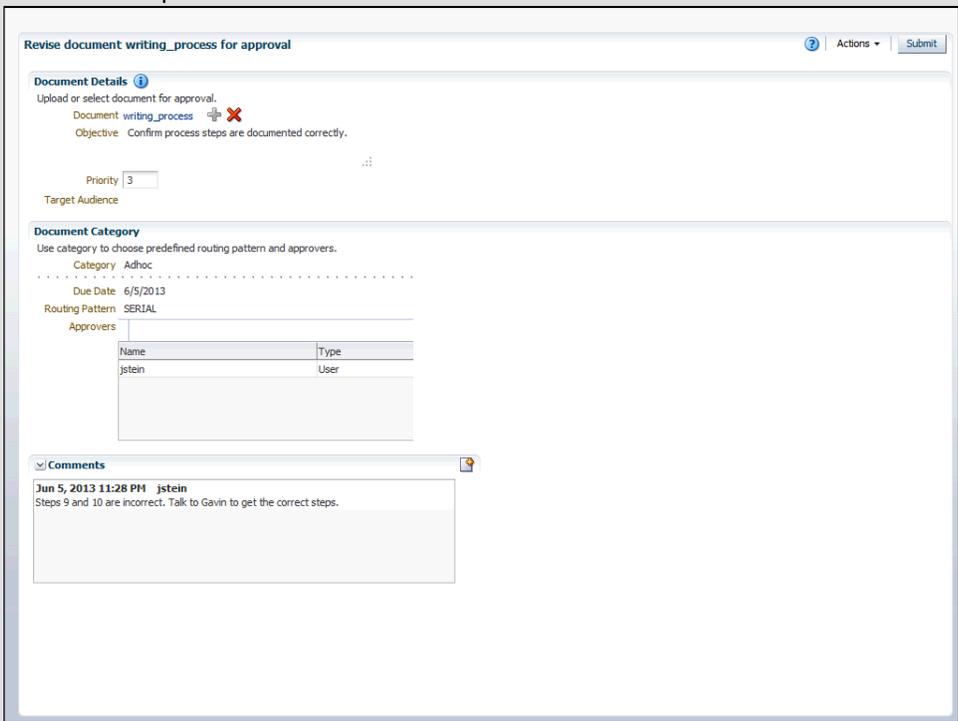


- 2. Select the document approval request task you want to revise.

Click on the task to open it in the **Task Details** section. Double-click the task to open in a new window. In this example, you will double-click on the task.

Double-click the **Task** object.

- 3. Use the **Revise document *document name* for approval** page to resubmit a revised document request.



4. Your co-worker's comments appear in the **Comments** field.
5. When revising a document approval request only the **Document** and **Priority** fields can be modified.
6. You have to remove the current document before attaching a new version.
Click the **Delete** button.
7. Click the **OK** button.
8. Attach the revised document to the document approval request.
Click the **Add** button.
9. Use the **Add Attachment** dialog box to attach a document to your document approval request.
10. Each attachment type requires different information to be completed.
In this example, the information to upload a file to WebCenter Content is completed for you.
Click the **OK** button.
11. Use the **Submit** button to resubmit the document approval request to your approver for review and approval.
Click the **Submit** button.
12. You have completed the **Revising a Document for Approval Request** topic.

Administering Oracle Document Routing and Approval

This section is intended for administrators who maintain Oracle Document Routing and Approval (DRA).

As an administrator, you can install Oracle DRA and begin using the process accelerator as delivered. You can also modify Oracle DRA to fit the needs of your organization. This section covers the data elements you can modify.

Upon completion of this section, you will be able to:

- Maintain document category options.
- Describe the Voting Percentage Ruleset.
- Describe the Oracle Document Routing and Approval reports.

Maintaining Document Categories

Document categories enable an organization to specify different document types. Each document type can have different attributes and approvers. Oracle Document Routing and Approval ships with seeded values for document categories. The seeded values are:

- Adhoc
- Request for Proposal
- Supplier Invoice
- Web Content
- Annual Report Content
- HR Policy Content
- Request for Quote
- Price Change Justification
- New Policy Required Reading

Use the shipped document categories or add additional document categories to meet your organization's needs. The shipped document categories are preconfigured with document approvers. If you use the shipped document categories, you must replace the document approvers with your own users or groups. If you add additional categories and want them used in the processing of dispositioned document approval requests, you must update the voting rule. The voting rule applies only to the parallel document routing pattern.

In this topic, you will maintain document category options.

Procedure: Maintaining Document Categories

1. Begin by navigating to the **Maintain Document Categories** page.

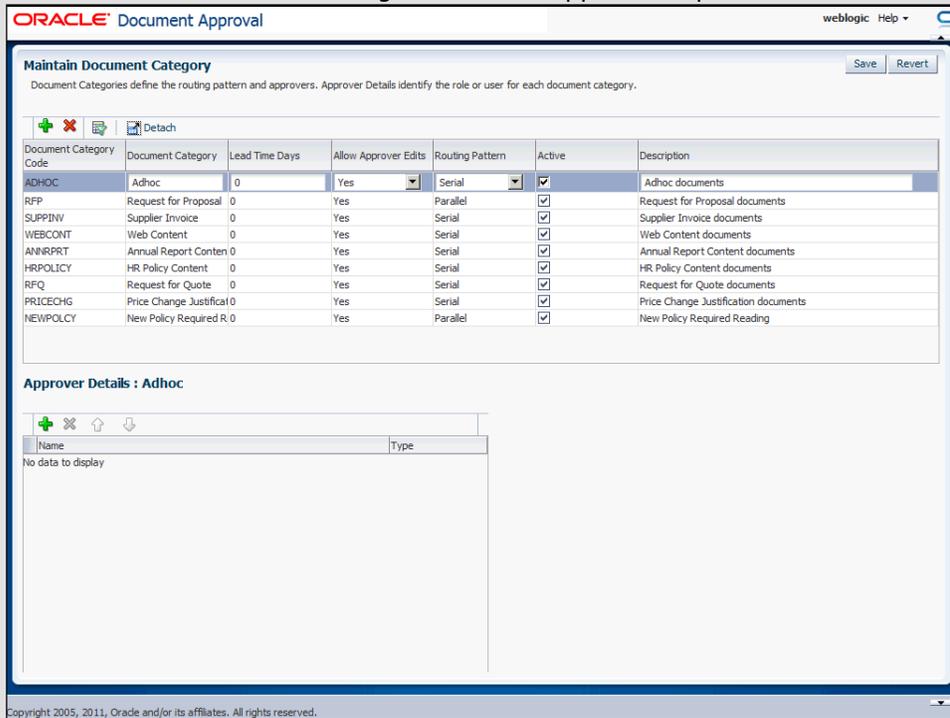
Click the **Links** link.

2. Use the **Maintain Document Categories** link to access the **Maintain Document Category** page.

Click the **Maintain Document Categories** link.

3. Use the **Maintain Document Category** page to modify the document category options

made available when submitting a document approval request.



4. First, add a new document category.
Click the **Add** button.
5. **Document Category Codes** are used as unique keys in the DA_DOC_TYPE table and built into the logic of Oracle DRA.
Click in the **Document Category Code** field.
6. **Document Category Codes** can be upper or lower case.
Enter the desired information into the **Document Category Code** field. Enter "**WHTPR**".
7. Next, specify a document category. Document categories appear on the **Submit document for approval** page.
Click in the **Document Category** field.
8. Enter the desired information into the **Document Category** field. Enter "**White paper**".
9. Specify a lead time of 5 days. The **Lead Time Days** field is used to calculate the default due date for the document type.
Click in the **Lead Time Days** field.
10. Enter the desired information into the **Lead Time Days** field. Enter "**5**".
11. Use the **Allow Approver Edits** field to determine if the approver list for this document type can be modified when used in a document approval request.
Click the **Allow Approver Edits** list.
12. Click the **Yes** list item.

13. Specify a routing pattern of **Serial** or **Parallel**. The **Routing Pattern** field determines how the document approval request is routed.

Click the **Routing Pattern** list.
14. Click the **Parallel** list item.
15. Next, specify that this document category should appear on the **Submit document for approval** page.

Click the **Active** option.
16. Use the **Description** field to add an optional description.

Click in the **Description** field.
17. Enter the desired information into the **Description** field. Enter "**White paper documents**".
18. Use the **Revert** button to cancel adding a new document category. This only works if the document category has not been saved.
19. Saving an active document category makes it available on the **Submit document for approval** page.

Click the **Save** button.
20. The document category **White paper** is now added.
21. Next, add an approver to the **White paper** document category.

Click the **Add** button.
22. Use the **Search users, groups, roles** dialog box to add approvers to the document category.
23. Search and select approvers for the selected document category. In this example, the approver has been selected.

Click the **OK** button.
24. **jstein** is now an approver for the **White paper** document category.
25. Save the approver with the document category.

Click the **Save** button.
26. Next, modify the **White paper Lead Time Days** value.

By default, the first row is automatically selected. When modifying or deleting a document category, ensure the row you want to take action on is selected. You can click anywhere in the row to select it.

Click in the **Lead Time Days** field.
27. Enter the desired information into the **Lead Time Days** field. Enter "**7**".
28. Click the **Save** button.

29. The lead time is now modified.
30. There are two types of delete, a hard delete and soft delete.

A hard delete removes the document category from the database table, provided it is not used in a document approval request.

First, perform a hard delete on the document category **White paper**.

Click in the **Document Category Code** field.
31. Click the **Delete** button.
32. Click the **Save** button.
33. The **White paper** document category is now deleted.
34. A soft delete is used for inactivating a document category already used in document approval requests. Inactivated document categories are not displayed as options on the **Submit document for approval** page.

Next, perform a soft delete on the **Request for Quote** document category.

Click in the **Document Category Code** field.
35. Click the **Active** option.
36. Confirm that you want to make the **White paper** document category inactive.

Click the **OK** button.
37. Click the **Save** button.
38. The **Request for Quote** document category is now inactive.
39. Next, query the **Routing Pattern** field.

Click the **Query By Example** button.
40. You can query on any field by clicking into that field. You can query using whole or partial words.

Click the **Routing Pattern** list.
41. Click the **Parallel** list item.
42. The document categories with a parallel routing pattern are displayed.
43. Clear the query field to display the full list of document categories. In this example, the field has been cleared for you.
44. The full list of document category options is viewable again.

The **Query By Example** button can be toggled on or off.
45. You have completed the **Maintaining Document Categories** topic.

Understanding the Voting Percentage Ruleset

You must have a solid working knowledge of Oracle SOA Suite, Oracle BPM Suite, and Oracle Business Rules before modifying any business rules. For information on these products, see:

- *Oracle Fusion Middleware User's Guide for Oracle Business Rules*
- *Oracle Fusion Middleware Administrator's Guide for Oracle SOA Suite and Oracle Business Process Management Suite*

Oracle Document Routing and Approval uses the Voting Percentage Decision Table, in the Voting Percentage Ruleset, to determine the voting percentage for each submitted document. The voting rule applies to document categories with a parallel routing pattern. This decision table includes conditions and actions as its rows and rules as its columns. The rules test the values of the conditions and set corresponding values for the actions. The rules must account for all possible combinations of values of all conditions in the table. A value of otherwise means "all values not listed."

Upon submission of a document approval request, the rules engine tests each condition. If a combination of condition values matches a rule, the corresponding actions are taken. The Voting Percentage Decision Table provides the details for each condition, its rules, and the actions to execute. Following the table is an example scenario explaining how a document approval request is processed based on a given condition and action.

Voting Percentage Decision Table

		R1	R2
Conditions	DocumentRequestType.documentTypeCode	otherwise	Adhoc
Actions	assert new VotingPercentageBOType	✓	✓
	approvalPercentage:String	100	100
	rejectionPercentage:String	1	1
	revisionPercentage:String	1	1

James Cooper submits a document request with a document category other than ADHOC to John Steinbeck, William Faulkner, and Agatha Christie. John and William approve the document. Agatha requests a change to the document. James' document is not approved because the approval voting percentage is not 100%, due to Agatha requesting a change.

You can modify the existing ruleset, condition, or actions. Condition 1 is used to capture all document categories with a parallel routing pattern, other than ADHOC, so the rules do not have to be updated for each new document category. If you want different voting percentages, additional conditions must be added. For example, if you want a different voting percentage for the document category Whitepaper, a condition must be added specifically for this category. Document approval request processing fails if this ruleset is deleted. To modify the ruleset, conditions, or actions, see "Editing Rules in an Oracle Business Rules Dictionary at Run Time," in *Oracle Fusion Middleware User's Guide for Oracle Business Rules*.

Understanding Oracle Document Routing and Approval Reports

This section is intended for managers reviewing reports for their directs.

You must have a solid working knowledge of Oracle Business Activity Monitoring (BAM) before creating or editing the Oracle Document Routing and Approval (DRA) dashboards and reports. For information on creating and editing Oracle BAM reports, see "Creating and Managing Reports," in *Oracle Fusion Middleware User's Guide for Oracle Business Activity Monitoring*.

This section covers the Oracle BAM reports delivered with Oracle DRA. Document Routing and Approval includes four reports within an operations dashboard. These reports use information

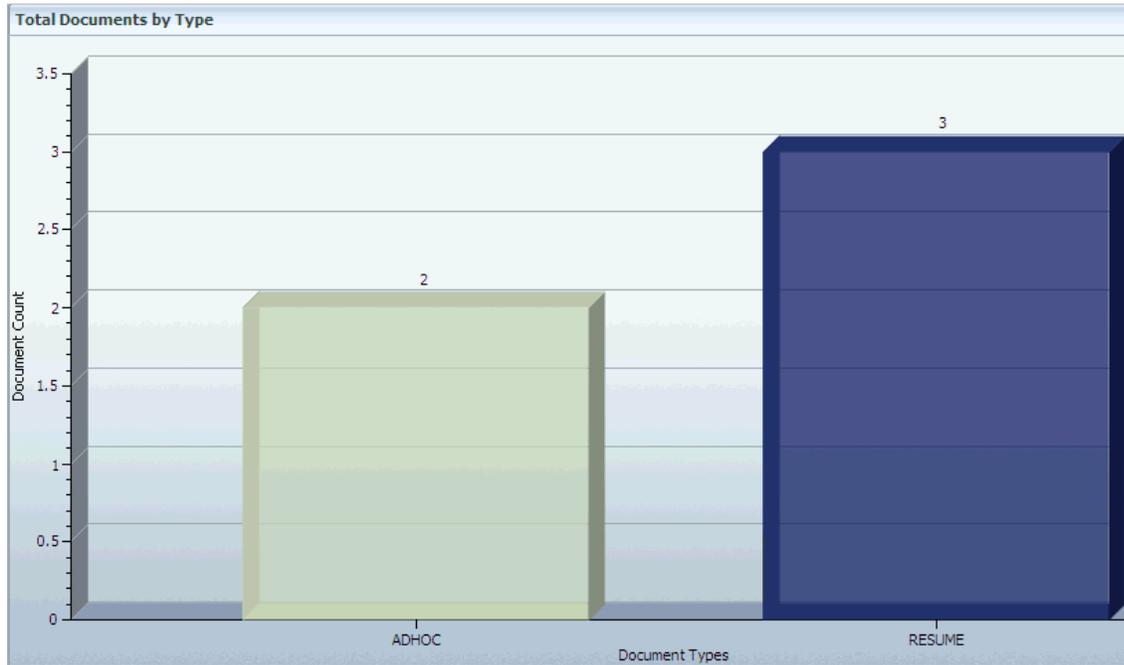
from the document approval requests submitted in Oracle DRA. Information from saved document approval requests is not used in the reports.

Operations Dashboard

The operations dashboard includes four reports pertaining to document approval request utilization. The following provides an explanation and a sample image of the reports.

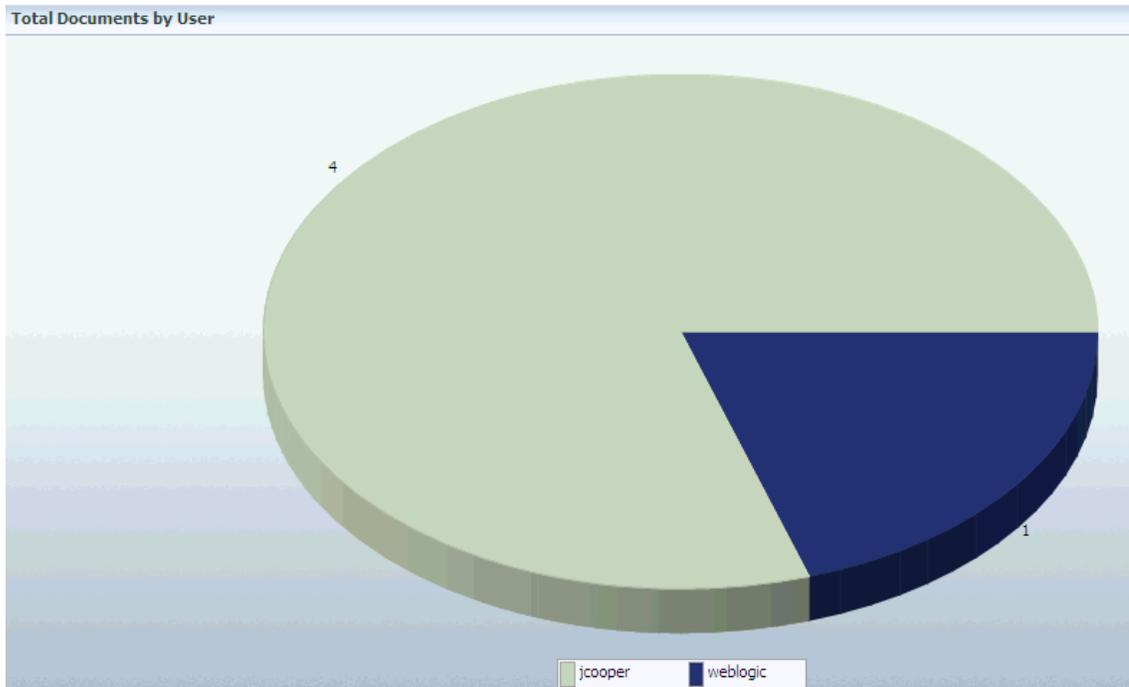
Total Documents by Type

The Total Documents by Type is a bar chart report summarizing the total number of submitted document approval requests, on the Y-axis, for all document categories, on the X-axis. The report displays all the document approval requests for the current quarter.



Total Documents by User

The Total Documents by User is a pie chart report summarizing the total number of document approval requests submitted per user for the current quarter. The chart displays each user who submitted a document approval request and the number of requests submitted.



Document Outcomes by User

The Document Outcomes by User is a crosstab report summarizing the total documents submitted by category, per submitter, and the request status for approve, reject, revise, and submit. An additional column summarizes the total count on the far right side of the report. The Document Outcomes by User report displays information for the current quarter.

Document Outcomes by User					
Total Count (Count)					
DocumentStatus					
Submitter	APPROVE	REJECT	REVISE	SUBMIT	Count
DocumentType	Total Count				
jcooper	1	2	1		4
RESUME				1	1
weblogic				1	1
Grand	1	2	1	1	5

Late Documents by Submitter

The Late Documents by Submitter is an updating order list report summarizing the documents submitted for approval by a document owner that are past due, in terms of approvers not dispositioning by the due date. From left to right the report displays the document submitter name, document name, the document type, due date, and the document ID.

Submitter	Document Name	Document Type	Due Date	ID
jcooper	bamt1	ADHOC	1/24/2012 5:35:49 AM	2d31303734373238353332323634363
jcooper	bamt2	RESUME	1/24/2012 5:36:40 AM	2d3133363234363233333335353839323
jcooper	bamt4	RESUME	1/24/2012 5:37:41 AM	2d36313431323833303130333738323
weblogic	bamt6	RESUME	1/24/2012 10:05:59 PM	3930363230393634323730363534343

Delivered Documentation

This section provides a complete list of delivered documentation for Oracle Document Routing and Approval (DRA).

The delivered documents are:

Oracle Fusion Middleware Installation Guide for Oracle Process Accelerators - This content provides instructions for installing any Oracle Process Accelerator.

Oracle Process Accelerators Known Issues - This content provides information about the known issues with any Oracle Process Accelerator.

Oracle Fusion Middleware User's Guide for Oracle Document Routing and Approval Process Accelerator - This content provides information on how to use and modify Oracle Document Routing and Approval Process Accelerator. The content of this manual is also available in the following formats:

- Process Accelerator Help system
- User Productivity Kit (UPK) demo
- UPK source content

Process Accelerator Help System - The Help system is available when you launch the  or the **User Productivity Kit** link from the process accelerator Help menu.

UPK Demo - You can use the User Productivity Kit demo for training or presentation purposes while installing the process accelerator. To utilize the UPK demo, unzip the **<PA acronym>UPK.zip** file and distribute the PlayerPackage directory and its contents to those who need training; or place the PlayerPackage directory and its contents on a web server and provide the URL to its location. The **play.exe** file launches the UPK Player.

UPK Source Content - If you have a licensed version of Oracle User Productivity Kit you can modify the UPK content using the **UPKSource.zip** file. Use the following steps to deploy your modified UPK content as the Help for the Process Accelerator.

1. Unzip **UPKsource.zip**.
2. In UPK Developer, import the **<PA acronym>UPKsrc.odarc** file you want to modify.
3. Modify and publish your updated content to the Player.
4. Rename the **PlayerPackage** directory to **<PA acronym>UPK**.
5. Convert the **<PA acronym>UPK** directory and its contents into a web application archive (war) file called **<PA acronym>UPK.war**.
6. On your Oracle WebLogic Server, navigate to **\$PA_HOME/pa/src/<PA acronym>/UPKObjects**, rename **<PA acronym>UPK.war** to **<PA acronym>UPK.warORIG**.
7. Copy your new **<PA acronym>UPK.war** to **\$PA_HOME/pa/src/<PA acronym>/UPKObjects**.
8. Navigate to **\$MW_HOME/user_projects/domains/soainfra/servers/AdminServer/upload/<PA acronym>UPK/app**, rename **<PA acronym>UPK.war** to **<PA acronym>UPK.warORIG**.
9. Copy your new **<PA acronym>UPK.war** to **\$MW_HOME/user_projects/domains/soainfra/servers/AdminServer/upload/<PA acronym>UPK/app**.
10. In Oracle WebLogic Server Administration Console, navigate to the **Domain Structure** navigation tree, click **Deployments**.

11. On the **Summary of Deployments** page, select the **<PA acronym>UPK** check box, and click **Update**.
12. On the **Update Application Assistant** page, change the **Source Path** to the location you extracted the **<PA acronym>UPK.war** file to.
13. Click **Next, Next**, then **Finish**.
14. Launch the Process Accelerator Help to view the updated documentation.