Customizing Workflow Notifications in Oracle Fusion: End-to-End Guide

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Contents

This document provides a practical, step-by-step guide for customizing workflow notifications in Oracle Fusion using BI Publisher. It is intended for functional consultants, administrators, and support teams who need to safely edit notification content, validate changes, and understand Oracle's caching behavior.

Required Tools: BI Publisher Word Add-In

Workflow notification layouts in Oracle Fusion are delivered as RTF templates. These templates must be edited using the BI Publisher Word Add-In if you want to see and update conditional logic or add new fields from a data model.

Download it here: [Install Oracle BI Publisher Desktop Add-In for Microsoft Word]

Custom vs Seeded Folder Structure

Oracle Fusion resolves workflow notifications by first checking the Custom folder. If no matching report exists, it silently falls back to the seeded version.

Custom reports must fully and exactly replicate the seeded folder structure and titles

Example:

Seeded Path:
Supply Chain Management → Workflow Notifications → Warehouse Operations

Custom Path:
Custom → Supply Chain Management → Workflow Notifications → Warehouse Operations

At this point, you need to

- Archive the Data Model and Report
- Create the necessary folder structure
- Unarchive the Data Model and Report in the new spots

Obtaining Sample XML Data from the Data Model

This step is really only necessary if you want to add or edit what fields are displayed. If you only want to edit text, like adding a note or link to help documentation, then it's not required. This also lets you preview with real data; but once you know the data tags, previewing here is less necessary and in practice, not a required step.

Steps to generate and attach sample XML:

- Navigate to BI Publisher and open the associated Data Model
- Click View Data and enter required parameters (sometimes this means finding ID values to enter as a parameter that are determined normally by the ESS job. You may need to do some extra work to figure out how to do this well.)
- Confirm the output data is correct and select Save as Sample Data.
- Open Data Model Properties and click on the sample.xml linked

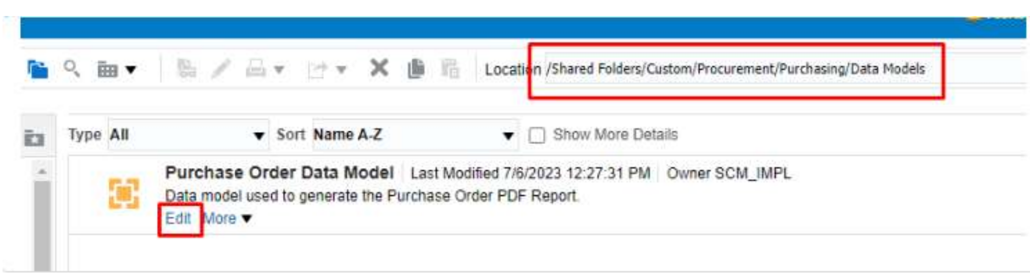

Figure 1 Finding Data Model for sample data

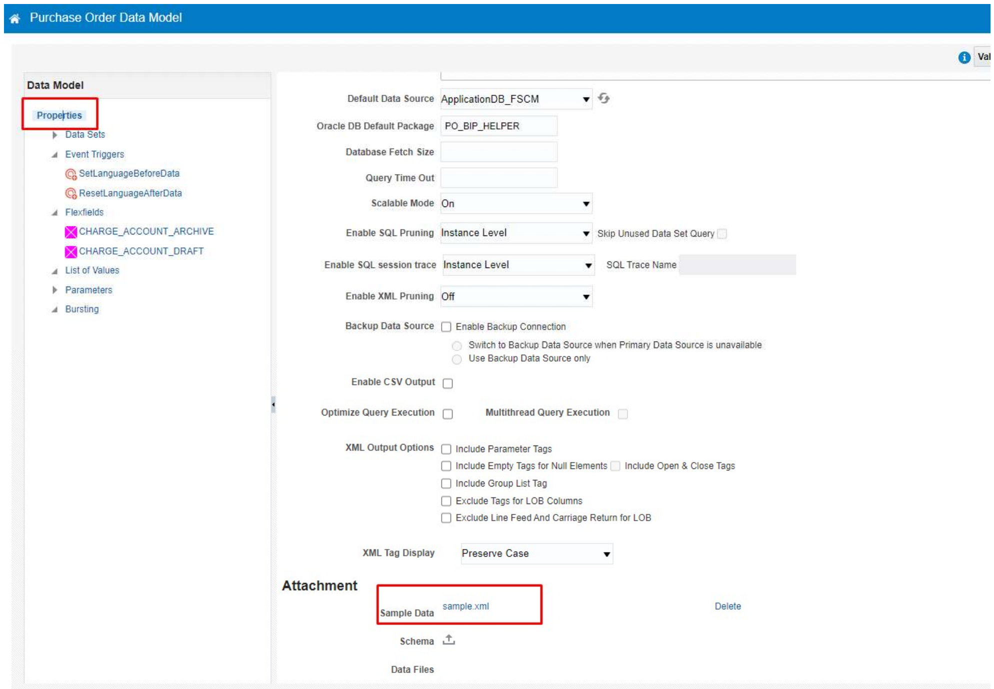

Figure 2 Export Sample Data XML from Properties tab

Getting the RTF Template

Download the RTF template by selecting Edit, then selecting the Layout you want to edit and clicking to Edit on that as well. The RTF will download right away. Save it somewhere with a name you can remember.

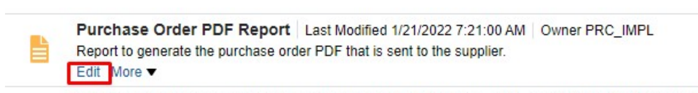

Figure 3 Opening Report to export RTF

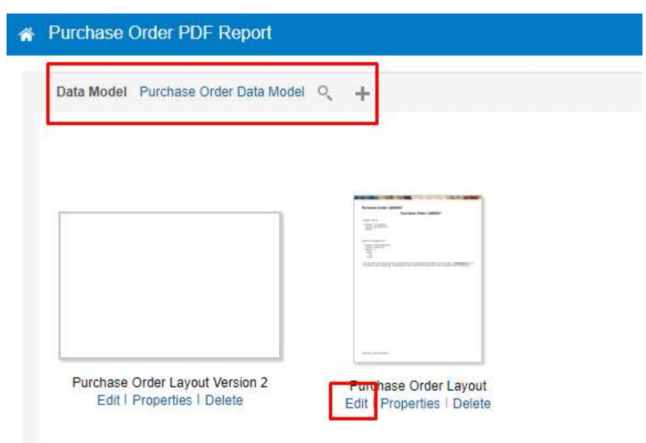

Figure 4 Select Edit to export RTF

Editing the RTF Template

The RTF template controls the notification text, formatting, and conditional logic. All wording changes are made here using Microsoft Word with the BI Publisher add-in enabled. So, open the RTF file you just downloaded in Word and get started!

- Select your Sample XML file to retrieve the list of fields
- Use the Field Browser to insert or modify fields
- Adding text or links? Just edit like a normal Word doc, including formatting
- Avoid hardcoding values; bind to XML nodes instead
- Keep formatting simple for email compatibility
- Add a version number at the bottom of the template – if you don't see what you expected, this lets you confirm
    - This is my latest version, so my changes must have been wrong, or
    - This is still showing the previous version, so my changes may be fine, and I need to wait for the cache to catch up.
- Save the file with a new name that is also easy to remember

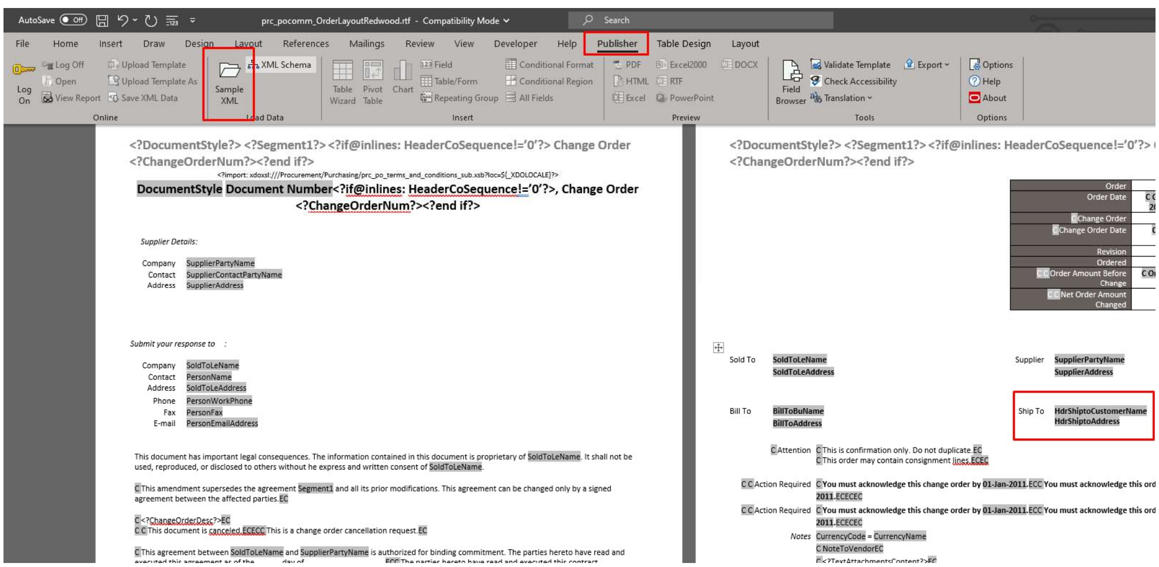

Figure 5 Opening Sample XML in Word Publisher

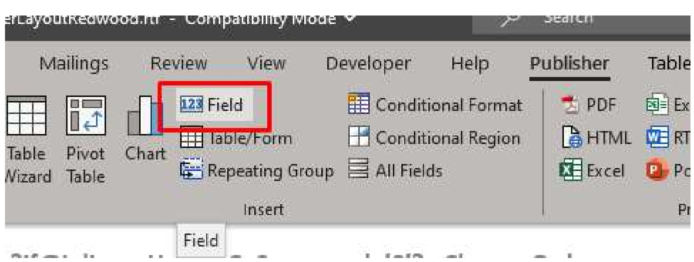

Figure 6 Add Fields from XML to Document

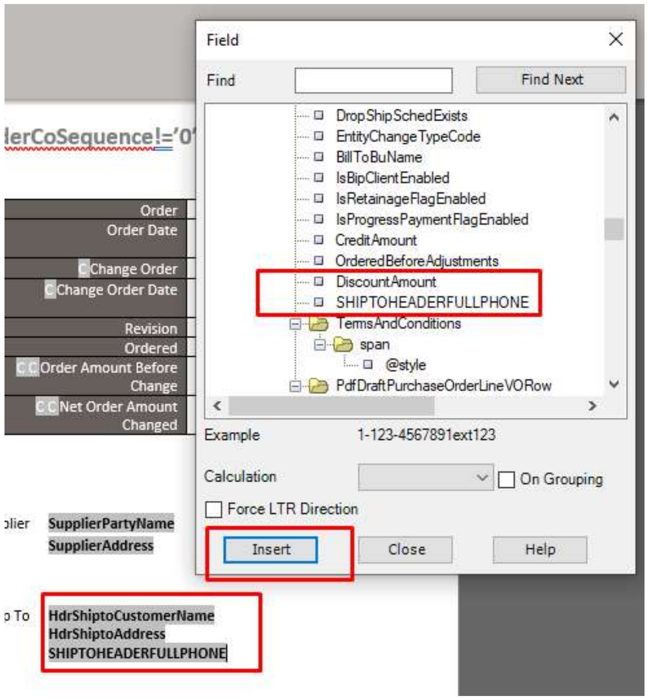

Figure 7 Add fields to report

Adding the Updated Layout to the BI Publisher Report

After updating the RTF file, the layout must be added back into the BI Publisher report. Changes to the RTF alone are not sufficient.

- Open BI Publisher and navigate to the report
- Add a new Layout
- Upload the updated RTF template
- Set the new layout as Default – this is key!
- Save the report

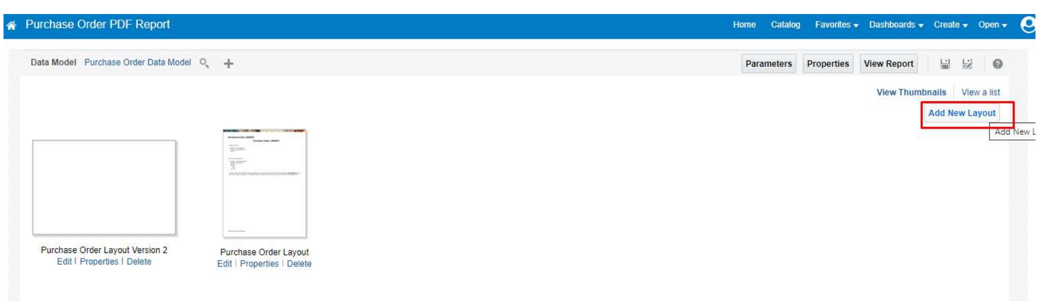

Figure 8 Add New Layout

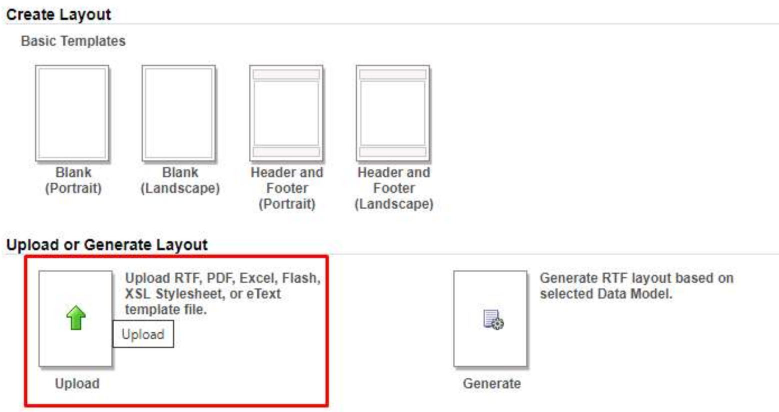

Figure 9 Select to upload Layout

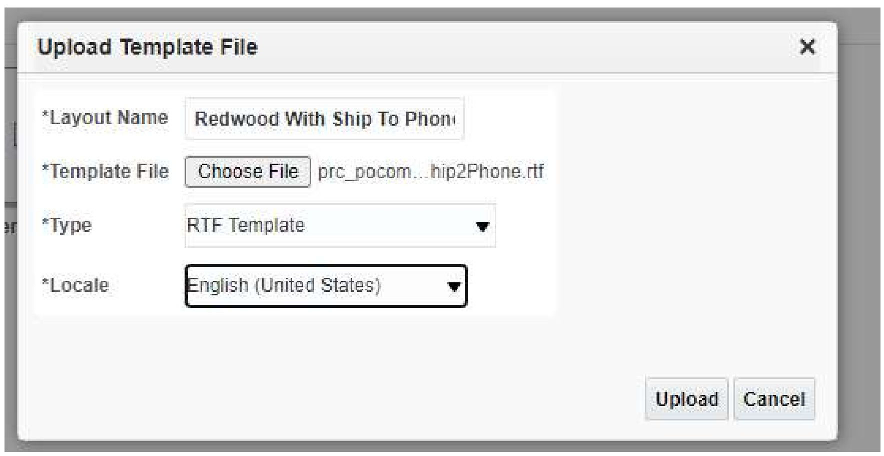

Figure 10 Give a name, select RTF and locale

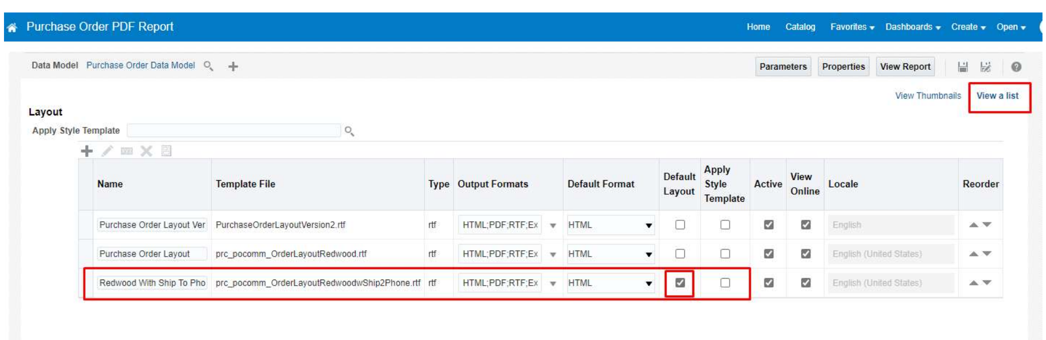

Figure 11 Set new Layout as Default

Reducing Cache Time Using Profile Options

This is one of the most important steps, because not understanding this can cause you significant rework and frustration. BI Publisher caches the resolved report path (Custom vs Seeded) for 24 hours by default. This means your changes are not reflected in real time!

Oracle allows the cache refresh interval to be reduced using the profile option BIP_CLIENT_REFRESH_TIME. There are module specific versions or a global version.

- Default value: 1440 minutes (24 hours)
- Minimum recommended value: 15 minutes
- Oracle resets the value back to 1440 after 24 hours
- Steps to update the profile value:
- Navigate to Setup and Maintenance
- Search for Manage Administrator Profile Values
- Search for BIP_CLIENT_REFRESH_TIME for global changes or one of the product versions if you only want to update for your module: _FIN, _HCM, _PRC, _PRJ, _SCM
- Create the profile option if it does not exist – follow instructions on the link below
- Set the value (e.g., 15) and save

Link to Oracle documentation for creating the profile options: Reflect Changes from Edited Reports Sooner

Validation and Testing Checklist

Before approving changes, confirm the following:

- The layout is attached to the report and marked as default
- The report exists under the full Custom folder structure
- The expected version number appears in the notification
- Cache refresh timing has been considered and has passed – 15 minutes is perfect for getting a coffee and stretching your legs.
- Then, run your notification and check the output. Remember you can use BPM Worklist administrative mode to see notifications sent to other users.

About the Author

Michael Gibby is a Director at Huron Consulting Group, where he specializes in Oracle Fusion Supply Chain in the Higher Education, Healthcare and Commercial industries. His diverse background in international manufacturing using EBS helps him drive practical but innovation solutions, rooted in solid business process design. When he isn’t implementing Oracle P2P solutions, he is busy raising two future Oracle Cloud Consultants, and occasionally he finds time to rebreather dive in underwater caves in North Florida.