Oracle® Product Data Quality

Task Manager Reference Guide

Version 5.5

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ORACLE

Oracle Product Data Quality Task Manager Reference Guide, Version 5.5

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This product is currently English only.

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Preface

About this Book

This reference guide is intended to explain the basic capabilities of the Oracle Product Data Quality Task Manager. It describes how to create and maintain tasks. The document is organized as follows:

- Chapters 1 through 4 describe the application features.

To understand all of the features presented, you must use this reference guide in conjunction with the Oracle Product Data Quality documents listed in Related Information.

Review the following Oracle Product Data Quality documentation prior to the use of this manual is recommended:

- *Oracle Product Data Quality Application Studio Reference Guide*
- *Oracle Product Data Quality Knowledge Studio Reference Guide*

You must have Oracle Product Data Quality client software installed on your computer.

Intended Audience

You should have a basic understanding of the DataLens Technology. Including the functionality of the Oracle Product Data Quality Knowledge Studio, how it recognizes and standardizes data, and the Oracle Product Data Quality Application Studio applications.

This document is intended for all users of the DataLens Technology, including:

- Business Analysts
- Subject Matter Experts (SMEs)
- IT Administrators
- Application/Solution Owners

Conventions Used in This Book

The following typographical conventions that are used in this book:

file, directory, or path name

Used for the names of files, directories, or path names.

<server>

Used to indicate text that is to be replaced by user-supplied values.

bold

Used for new terms, new concepts, graphical user interface elements, or keyboard keys.

italics

Shows a book or cross-reference to related material or for emphasis.

Ctrl+x

Used to indicate a key sequence. A sequence such as **Ctrl-x** indicates that you must hold down the key labeled Ctrl while you press another key or button.

Tip: Indicates useful hints.

Note: Indicates additional or supplemental information.

Related Information

The following documents and resources contain useful information:

- The *Oracle Product Data Quality Application Studio Reference Guide* provides information about creating and maintaining Data Service Applications (DSAs).
- The *Oracle Product Data Quality AutoBuild Reference Guide* provides information about creating initial data lens based on existing product information and data lens knowledge.
- The *Oracle Product Data Quality Knowledge Studio Reference Guide* provides information about creating and maintaining data lenses.
- The *Oracle Product Data Quality Glossary* provides definitions to commonly used Oracle Product Data Quality technology terms.
- The *Oracle Product Data Quality Governance Studio Reference Guide* provides information about creating and maintaining Data Service Applications (DSAs).
- The *Oracle Product Data Quality Services for Excel Reference Guide* provides information about creating a DSA based on data contained in a Microsoft Excel spreadsheet.
- The *Oracle Product Data Quality Oracle DataLens Installation Guide* provides detailed Oracle Product Data Quality Oracle DataLens Server installation instructions.
- The *Oracle Product Data Quality Oracle DataLens Server Administration Guide* provides information about installing and managing an Oracle DataLens Server.
- The *Oracle Product Data Quality Connector Implementation Guid*e provides information about installing and configuring Oracle Product Data Quality.
- The *Oracle Product Data Quality COM Interface Guide* provides information about installing and using the Oracle DataLens Server COM APIs.
- The *Oracle Product Data Quality Java Interface Guide* provides information about installing and using the Oracle DataLens Server Java APIs.
- The *Oracle Product Data Quality User Guide* provides information about how to use Oracle Product Data Quality.

Chapter 1

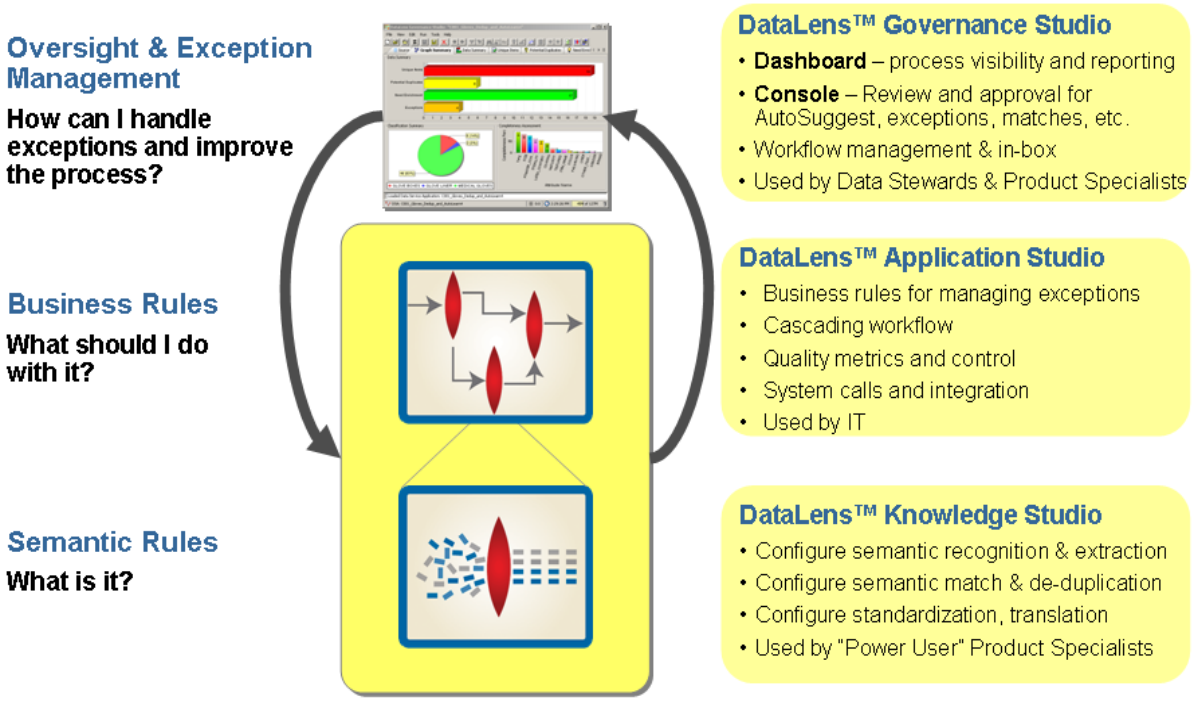
Introduction

In this chapter

- Task Flow 3
- Starting the Software 4
- Understanding the Client Workspace 6

Oracle Product Data Quality is built on industry-leading DataLens™ Technology to standardize, match, enrich, and correct product data from different sources and systems. The core DataLens Technology uses patented semantic technology designed from the ground up to tackle the extreme variability typical of product data.

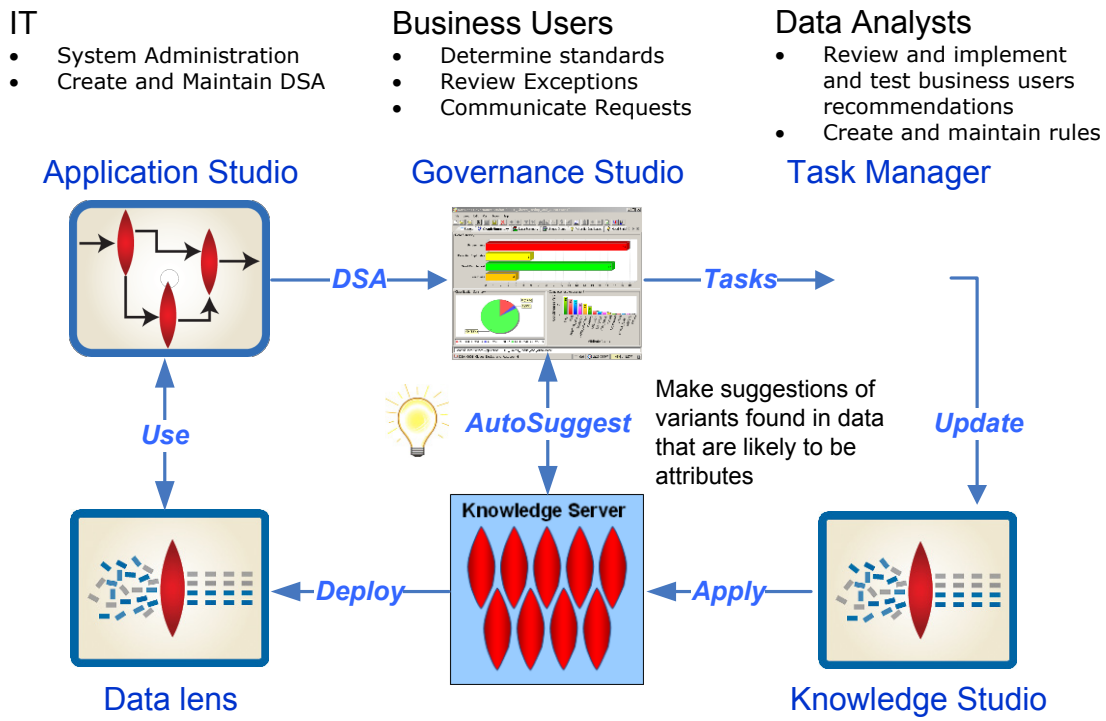
Oracle Product Data Quality uses three core DataLens Technology modules: Governance Studio, Knowledge Studio, and Application Studio. The following figure illustrates the process flow of these modules.



The Task Manager manages tasks generated from the Task Manager or tasks generated directly from the task manager. You can create tasks to request action from data analysts or IT personal to make changes to existing data lenses and Data Service Applications (DSA), such as adding missing attributes with the AutoSuggest feature of the Task Manager.

Task Flow

The Oracle Product Data Quality orchestrates a series of tasks to create and maintain knowledge. Typically, three roles exist to manage the task flow. **Business Users** are ultimately responsible for what constitutes knowledge based on their business requirements; **Data Analysts** implement those requirements; and the **IT** staff creates the process flow through a DSA to use the knowledge in a production application. The following diagram illustrates the high-level task flow associated with the Oracle Product Data Quality knowledge process.



Business Users (Data Stewart)

Works within the Task Manager to process exceptions and review overall data quality trends.

Data Analysts

Uses the Task Manager to receive requests and the Knowledge Studio to update the data lens with the recommended changes.

> Note: The Data Analyst is denoted by **TMUser** in the examples in this document.

IT

Uses Task Manager to receive requests and the Application Studio to make process flow changes.

Starting the Software

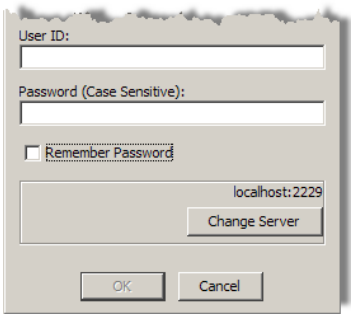
You can start Oracle Product Data Quality by using either the desktop shortcut or the Windows **Start** menu as follows:

> Note: If Oracle Product Data Quality is not installed, you can install it using the instructions in Installing the Client Software on page 36.

- Double-click the desktop shortcut.

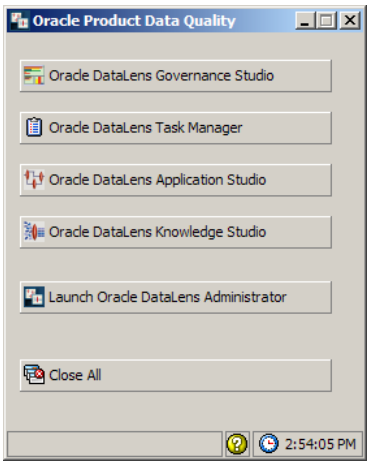
- Click **Start, Programs**, **Oracle Product Data Quality**, and select **Oracle Product Data Quality**.

The **Oracle Product Data Quality Login** dialog box appears.



Enter your user name and password and click **OK**. You can avoid entering your password every time you logon by selecting the **Remember Password** checkbox. If you want to change your Oracle DataLens Server, click **Change Server** to select a new server.

The **Oracle Product Data Quality Launch Pad** appears.

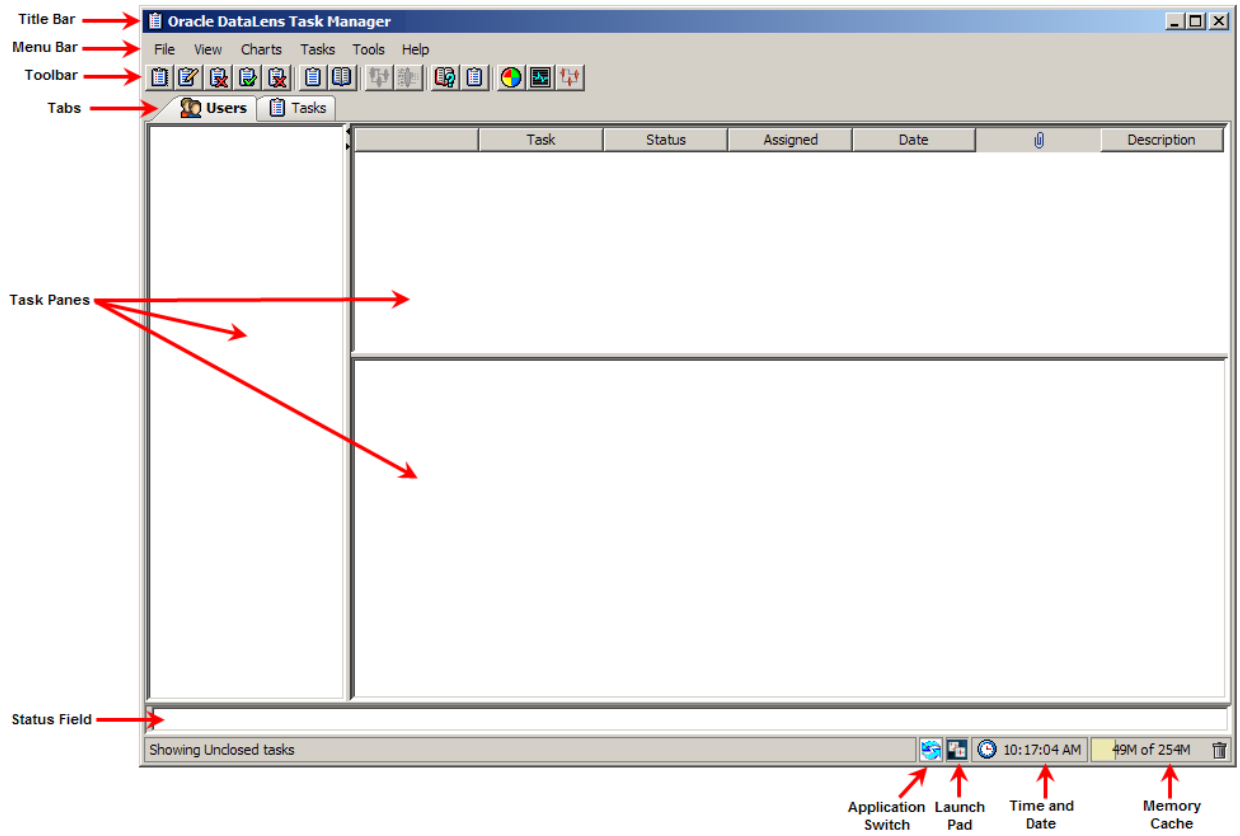


The **Oracle Product Data Quality Launch Pad** allows you to quickly start any of the Oracle DataLens Server applications by clicking on any of the buttons. You can close all open Oracle Product Data Quality applications using the **Close All** button.

Click the **Oracle DataLens Task Manager** button to start the application.

Understanding the Client Workspace

The Task Manager graphical user interface (GUI) provides the client workspace used to create and manage a data lens.



This section describes the following areas of the client workspace:

- Frame Functionality
- Menu Commands and the Toolbar
- Tabs
- Task Panes

Frame Functionality

The Task Manager client workspace frame contains useful information and interactive functions including the following:

Title Bar

Indicates the current application and open project.

Status Field

Provides the status of the project one line at a time. Though this field cannot be resized, the scroll arrows on the right-hand side can be used to view all available status information. The status data does not change based on the selected tab; rather it is a compilation of all data.

Application Switch

Returns you to the last Oracle Product Data Quality application used.

Oracle Product Data Quality Launch Pad

This button opens the Oracle Product Data Quality Launch Pad so that you can select other applications.

Time and Date

The time is displayed and when you hover over this field.

Memory Cache

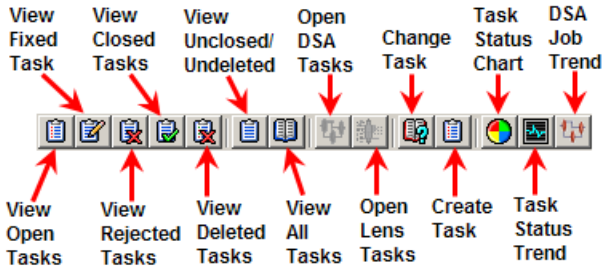
Indicates the amount of memory cache currently used and the total amount allowed. You can dump the memory cache by clicking on the trash can icon in this interactive field.

Note: This feature is only used for system diagnosis and should not be used unless requested by the support team.

Menu Commands and the Toolbar

The Task Manager toolbar allows easy access to the most frequently used Task Manager functions. Though the set of toolbar buttons remains the same during UI operation the buttons are enabled or disabled based the current state of the interface and the options set. Buttons displayed with shades of gray are disabled. Full-color buttons are enabled. All toolbar buttons are standard push buttons, requiring a single click of the mouse to activate.

The following briefly describes the toolbar buttons from left to right.



The Task Manager GUI menus provide access to most functions. All of the buttons on the toolbar have a corresponding menu command, which are indicated on each menu with the button icon displaying adjacent to the command. The set of menu commands remains the same during the GUI operation.

Menu commands are enabled or disabled based on the current state of the data lens; commands that are dimmed are unavailable. Some menu commands perform functions that are more complex and are indicated by an ellipsis symbol (...). These commands open dialog boxes to collect information needed to complete the requested function. Menu commands that toggle functions are preceded by checkmark (✓).

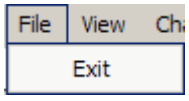
> Tip: The tooltips appear when you rest your mouse pointer on a menu item, button, tab, icon, or similar content.

The following section briefly describes each of the Task Manager menu commands and corresponding buttons.

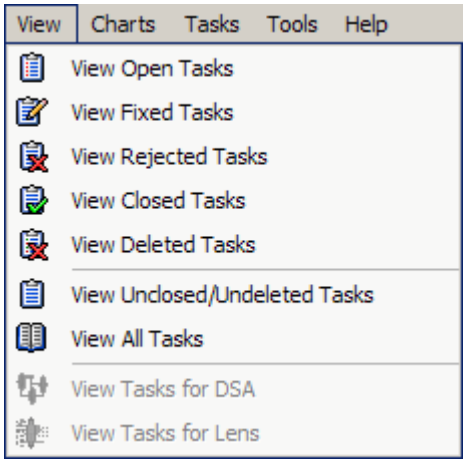
File Menu

Exit

Exits the Task Manager application; a prompt is given to save any changes that were made.



View Menu



View Open Tasks

View all open tasks.

View Fixed Tasks

View any fixed tasks.

View Rejected Tasks

View all rejected tasks.

View Closed Tasks

View all closed tasks.

View Deleted Tasks

View all deleted tasks.

View Unclosed/Undeleted Tasks

View any unclosed and undeleted tasks.

View All Tasks

View all tasks.

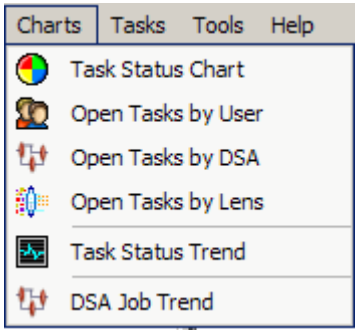
View Tasks for DSA

View the unclosed tasks for a DSA.

View Tasks for Lens

View the unclosed tasks for a data lens.

Charts Menu



Task Status Chart

Chart all tasks by status.

Open Tasks by User

Chart all open tasks by users.

Open Tasks by DSA

Chart all open tasks by DSAs.

Open Tasks by Lens

Chart all open tasks by data lenses.

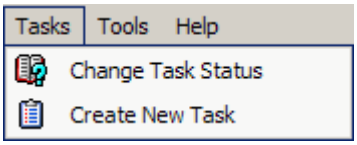
Task Status Trend

Trend line of status counts by week.

DSA Job Trend

Job trends by a DSA.

Tasks Menu



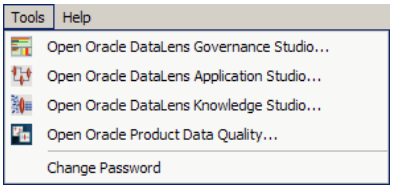
Change Task Status

Changes the status of the task or allows you to reassign it to another user. For more information, see Changing Task Status on page 30.

Create New Task

Creates a task and assigns it to a user. For more information, see Creating a Task in Task Manager on page 25.

Tools Menu



Open Oracle DataLens Task Manager...

Starts the Oracle Product Data Quality Task Manager. See the *Oracle Product Data Quality Task Manager Reference Guide*.

Open Oracle DataLens Application Studio...

Starts the Oracle Product Data Quality Application Studio. See the *Oracle Product Data Quality Application Studio Reference Guide*.

Open Oracle DataLens Knowledge Studio...

Starts the Oracle Product Data Quality Knowledge Studio. See the *Oracle Product Data Quality Knowledge Studio Reference Guide*.

Open Oracle Product Data Quality...

Starts the Oracle Product Data Quality Launch Pad.

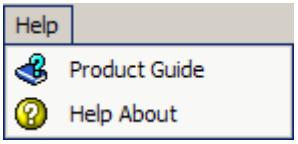
Change Password

Enables you to change your Oracle Product Data Quality password.

Help Menu

Product Guide

Opens a list of Oracle Product Data Quality documents for your selection in a browser.



Help About

Provides information regarding the product including the version number and a link to view third party product licenses.

Tabs

A tab groups like information into easy to read and access areas that include graphs, panes, and text entry boxes. Tabs are displayed in the client workspace directly under the toolbar and are as follows:

Users Tab

The **Users** tab provides a summary view all users with active tasks, as well as, all active tasks.

Tasks Tab

The **Tasks** tab provides a summary view of all of the tasks that the user has the privileges to see.

Task Panes

The Task Manager includes three task panes, two of which are interactive, as follows:

User

Displays an alphabetized list of users that have tasks assigned to them. This task pane only appears on the **User** tab.

Task

All tasks are displayed in numerical order and the first task is selected by default.

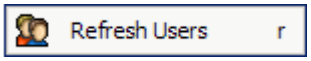
Task Detail

The details for the selected task are displayed including the description, status, assigned user, task detail, and history. This pane is not interactive.

On the **Users** tab, the small up/down arrows between the panes on the left-hand side, allow you to resize the panes. In addition, you can fully expand either pane to see more data by clicking on an arrow, which makes the pane inactive. To redisplay the inactive pane, click the opposite arrow and the pane reappears.

There are various context-sensitive (shortcut) menus that appear in the Task Manager interactive panes when you right-click on data within a pane. The contents of these menus are described as follows:

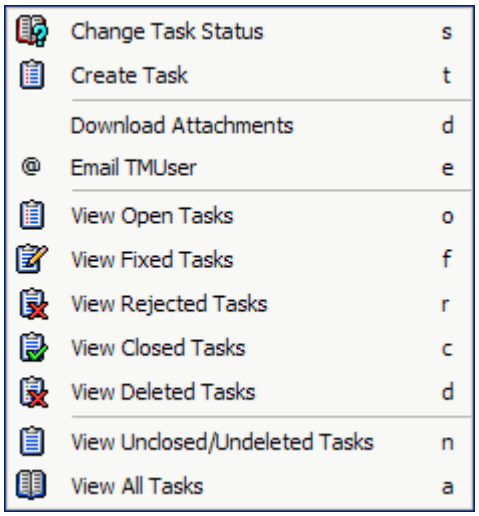
Active in the **User** pane:



Refresh Users

Refreshes the list of users with assigned tasks to ensure that any new users with tasks are displayed.

Active in the **Task** pane. The functions not previously described are:



Download Attachments

Downloads the attachment of the selected task to your local computer.

Email <*User*>

Sends a free-form email to the *User* that the selected task is assigned to using your default email program.

Chapter 2

Task Manager Administration Setup

In this chapter

- Role Administration 15
- New User Administration 16

The Task Manager access is controlled by the license. It may be activated with a valid license configuration after the Oracle Product Data Quality software has been installed.

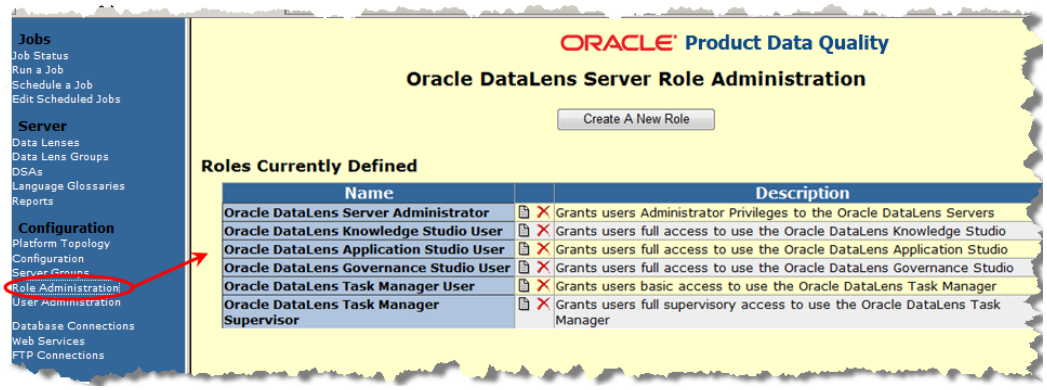
Role Administration

After the Task Manager is active, from the Oracle DataLens Administration web page. Two roles are created by default, Task Manager (TM) User and Task Manager Supervisor.

The following table shows the default capabilities for the two default roles:

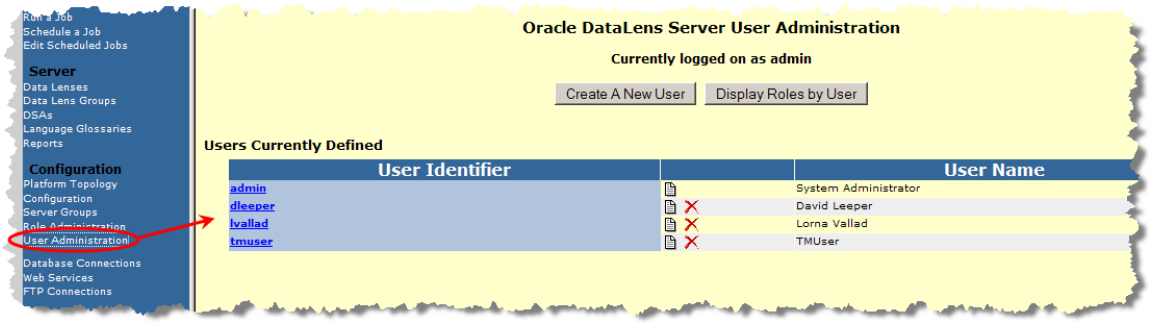
Role	Run TM	Add Tasks	Change Status of Own Tasks	Change Status of All Tasks	Close Tasks	Delete Tasks
TM User	✓	✓	✓			
TM Supervisor	✓	✓	✓	✓	✓	✓

All roles, including the two Task Manager roles, can be viewed from DataLens Server Role Administration web page by clicking the **Role Administration** link

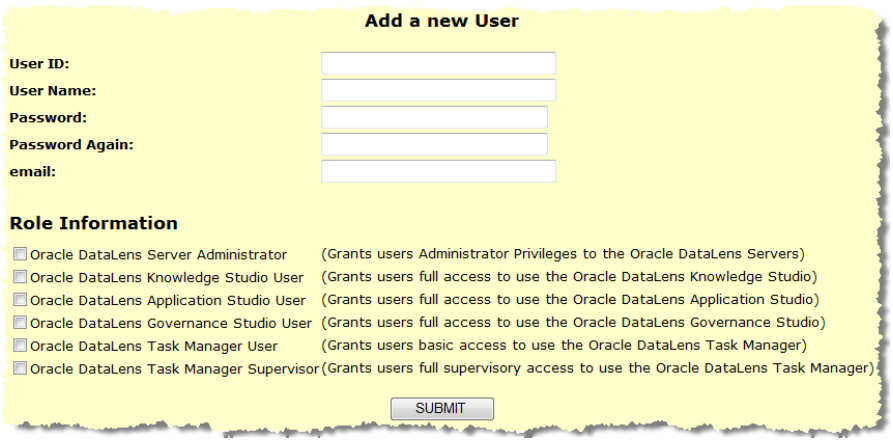


New User Administration

A new Task Manager user can be added from the Oracle DataLens Server Role Administration web page by clicking the **User Administration** link.



A new user is added by clicking the **Create A New User** button. The **Add a new User** page is displayed as follows:



Use this page to enter an ID, name, password, and email address for the new user. Then select all of the roles that the user to effectively use the Oracle Product Data Quality and click **SUBMIT** to add this user. The user is immediately added and is ready for use.

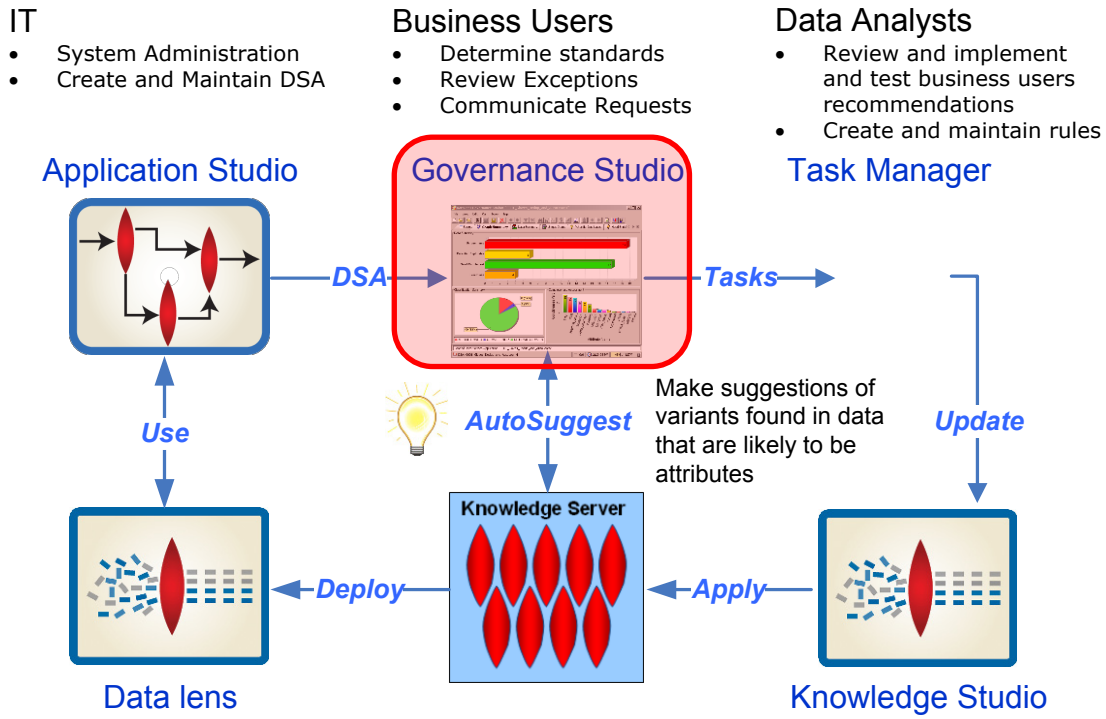
Chapter 3

Creating Tasks

In this chapter

- Creating a Task from an Output Tab 19
- Creating a Task from an AutoSuggest Tab 22
- Creating a Task in Task Manager 25

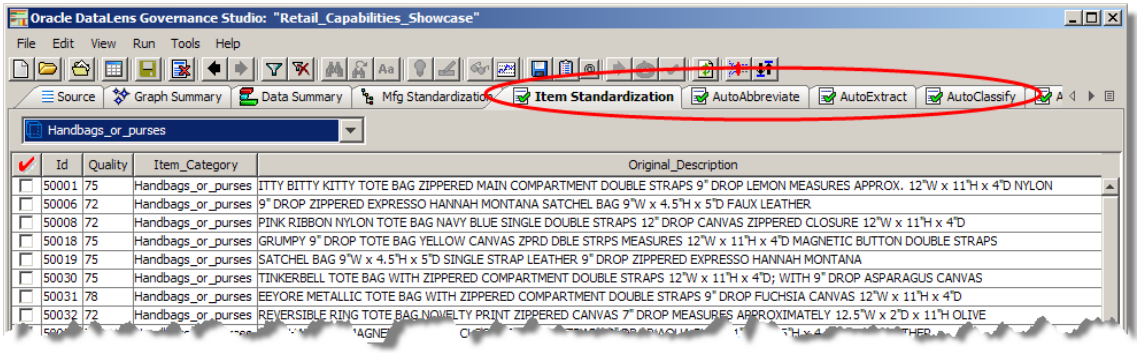
The Governance Studio runs a DSA job using a data lens currently deployed into production or development. The results of the DSA are a set of actionable items shown on the various output tabs in the Governance Studio. The Business User reviews the results, makes decisions about those results, and prepares some or all of the output for downstream processing. Tasks are created in the Governance Studio and can then be managed in Task Manager.



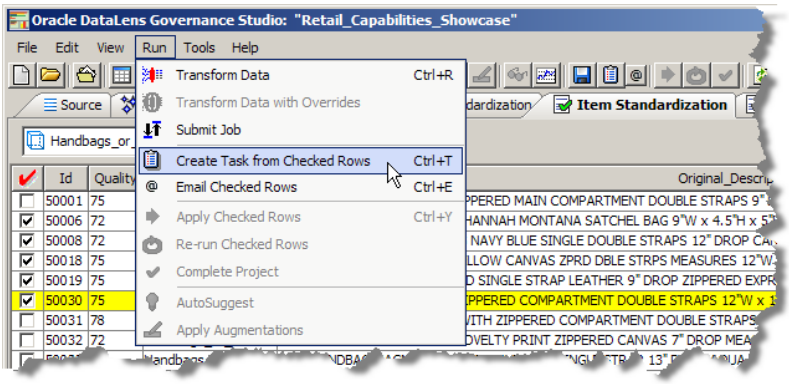
For complete details about using the Governance Studio application, see the *Oracle Product Data Quality Governance Studio Reference Guide*. This document presents Governance Studio examples in the context of the Task Manager management and processing.

Creating a Task from an Output Tab

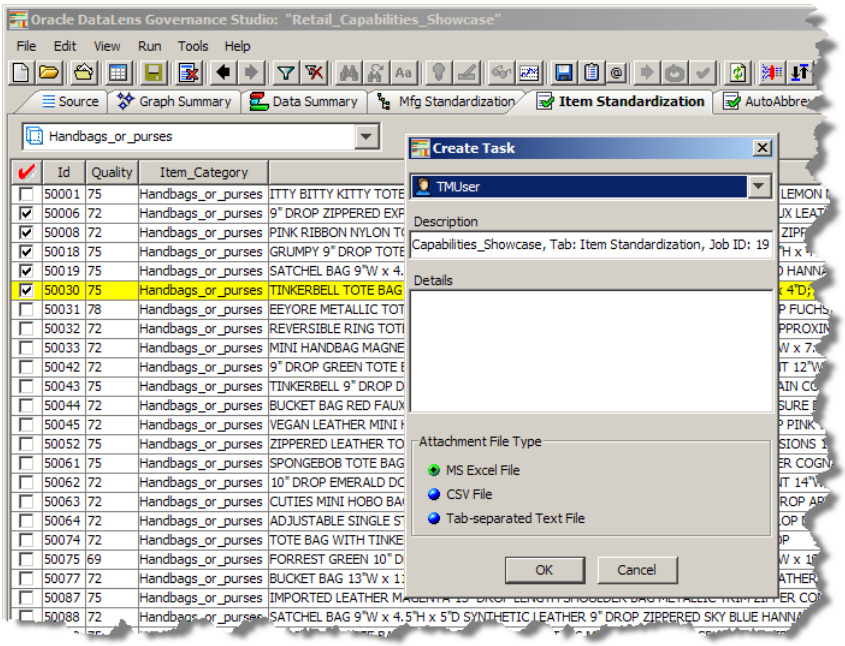
In Governance Studio, the Review, Approve, and Route Output tabs are identified by a green checkmark icon adjacent to the name of the tab. These tabs contain output data in tabular format that correspond to a DSA output step.



Data in these tabs may be selected for output to a file, output to another tab in the Governance Studio, edited, emailed, or run as input to a synchronous job. The following figure illustrates the creation of a task from by checking one or more rows on a Review, Approve, and Route tab:



When you select the **Create Task from Check Rows** option, the **Create Task** dialog box appears as follows:



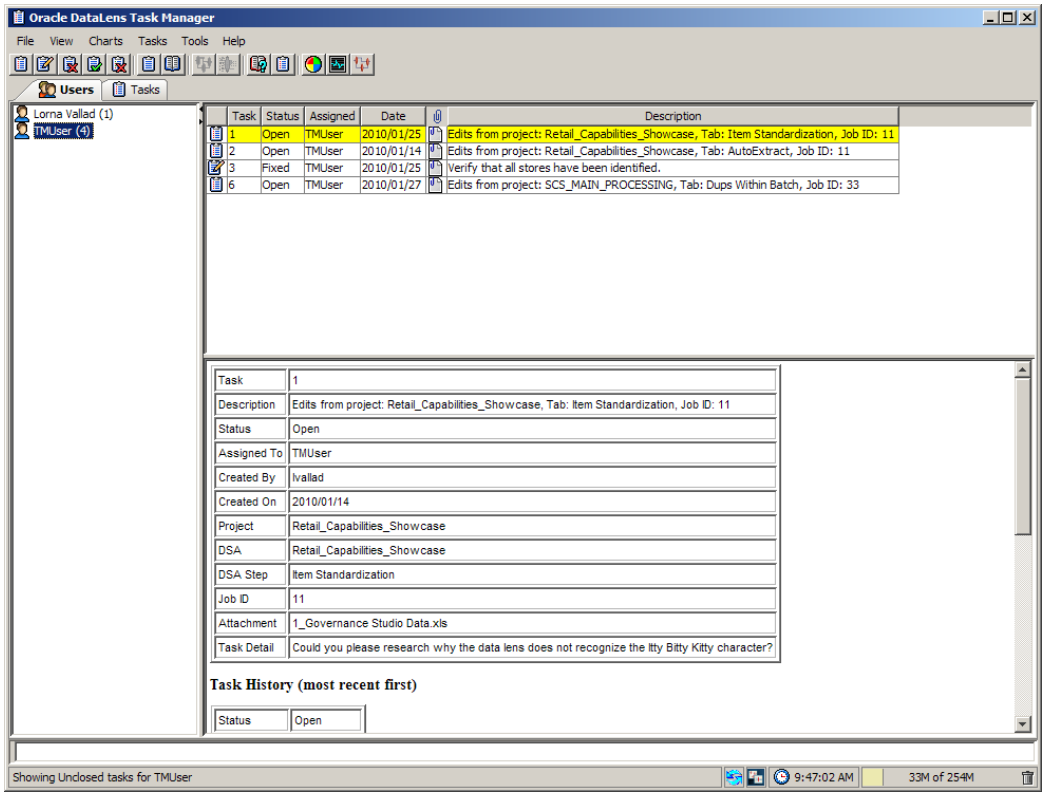
Note: This **Create Task** dialog box is very different than the one described in Creating a Task in Task Manager because the DSA, DSA step, and data lens are already known.

It allows you create and assign a task to a user as follows:

1. Select the user you want to assign the task to.
2. Enter a description for the task for display in all task lists.
3. Enter what you want the assigned user to do to complete the task; this is required and the task cannot be added without it.
4. Select the output file format for the contents of the selected rows from the following: a Microsoft Excel spreadsheet, CSV, or tab-separated text file.
5. Click **OK**.

The task is added and the assigned user receives an email advising them that they have a task to complete.

All tasks are displayed and are categorized by user as in the following example:

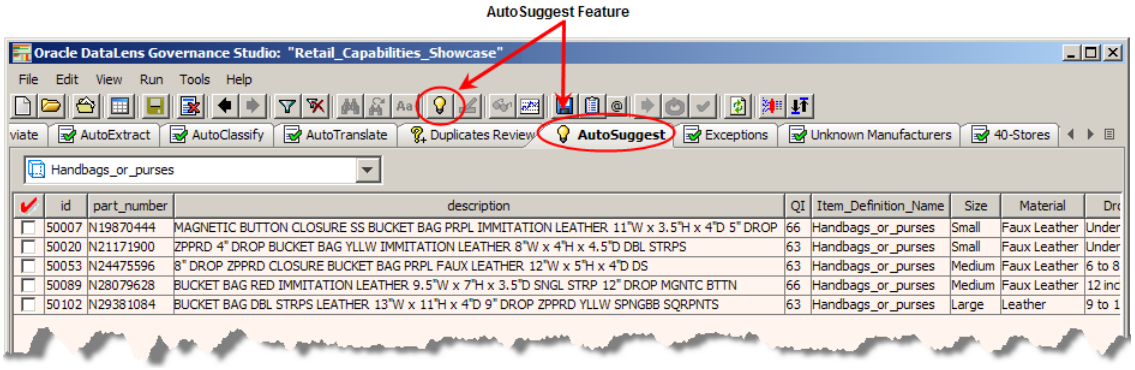


Creating a Task from an AutoSuggest Tab

One of the ways to add a task is by using the AutoSuggest feature so that the Governance Studio automatically suggests attributes that may have been missed due to misspellings or abbreviations. Suggested data from the AutoSuggest process may then be transferred to an Output tab for further processing or the data can be sent by email or through a task to the Data Analyst to update the data lens in the Knowledge Studio. This section describes the use of AutoSuggest results for Task Manager processing.

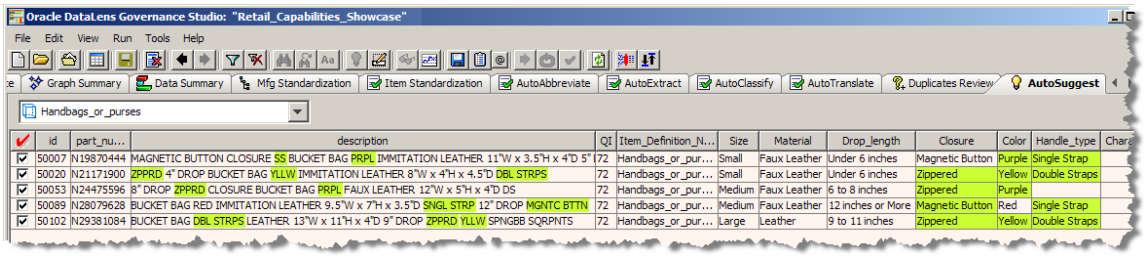
A typical example of the AutoSuggest process is a Business User presented with a set of exceptions that did not meet the Quality Index threshold because some of the attributes were not present.

You can use the AutoSuggest feature in Governance Studio to leverage the Oracle Product Data Quality to offer a set of suggestions based on variants of known terms.



The AutoSuggest tab is identified by a light bulb icon to the left of the tab name. Data in these tabs may access the Governance Studio AutoSuggest feature that automatically predicts attributes that may have been missed due to misspellings and abbreviations or missing grammar. When this tab is populated, there are suggestions available and the AutoSuggest button is active. If no suggestions were found, this button is inactive.

After clicking on an AutoSuggest tab, you will also see a list of rows of data that were designated for output by the respective output step in the DSA. To view suggestions click on the AutoSuggest button on the menu bar. Suggestions are now colorized in green as shown in the following figure:



For more information about the AutoSuggest feature, see the *Oracle Product Data Quality Governance Studio Reference Guide*.

Double-Click Edit Data

Double-clicking a cell in any of the output tables enables you to edit that cell. After double-clicking, notice that a text insertion cursor appears and the background of the cells turns to white.

Double-Click Toggle Selection

Double-clicking a suggestion in an AutoSuggest table disables the suggestion and changes the color to pink. You can double-click again to re-enable the suggestion and return the colorization to green. In this way, you can choose which suggestions you want to keep and those to discard.

Jump to Source

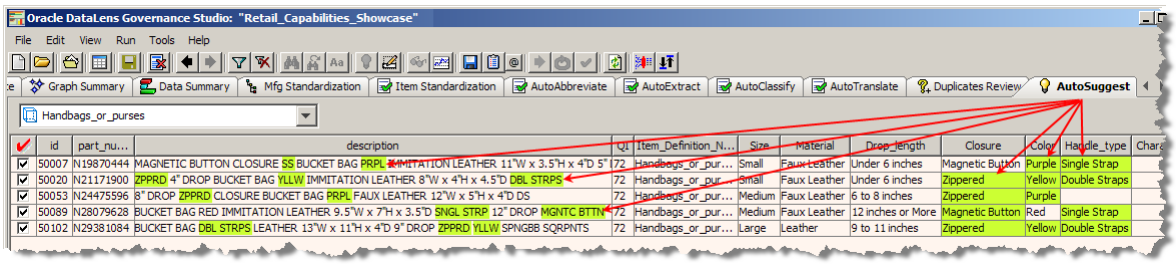
Right-clicking any cell colorizes the cell and displays a context-sensitive menu. Selecting the **Jump to Source** option automatically takes you to the corresponding line in the **Source** tab.

Copy Cell

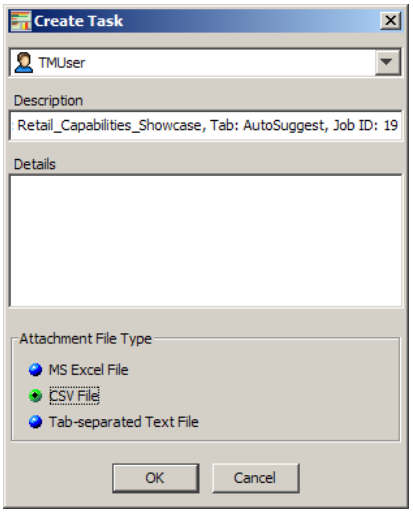
If you right click in a cell, you copy its contents to the clipboard by selecting the **Copy Cell** option from the context-sensitive menu.

Creating a Task from Checked Rows

You may select one or more rows to create a task for the Data Analyst to update the data lens. The following figure shows the green colorized terms in the description and the associated suggestions in the attribute columns on the right.



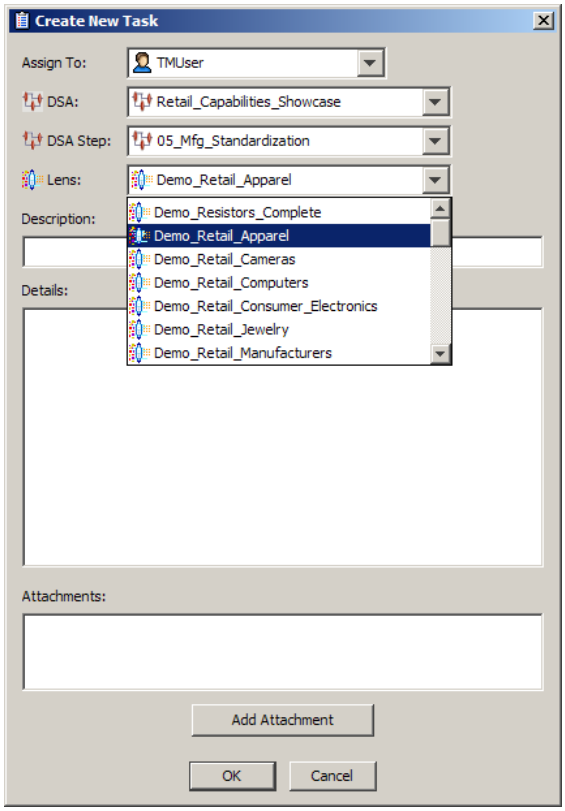
To do this, check the rows you want included in the task. From the menu, select **Run** and then click **Create Task from Checked Rows**.



You complete this dialog box as described in the Creating a Task from an Output Tab section though the **Description** field is automatically populated for you with the name of the DSA, tab name, and the Job ID that it is assigned.

Creating a Task in Task Manager

You can create a new task to be executed by a user from within Task Manager. This method is particularly useful when you want to view all of your available DSAs, each of their steps and data lenses rather than opening each DSA individually. To create a task, select **Tasks** from the menu bar and then click **Create New Task**.



Complete this dialog box as follows:

1. Select the user that you want assign the task to.
2. Select a DSA. This automatically populates the DSA Step and Lens drop-down lists with the corresponding selections based on the selected DSA.
3. Select a DSA step and data lens.
4. Enter a description for the task for display in all task lists.
5. Enter what you want the assigned user to do to complete the task; this is required and the task cannot be added without it.

   The task details could include the steps to take, a basic outline of your intent for the task, or other information regarding the execution of the task.
6. Optionally, you can use the **Add Attachment** button to add any supporting files that are pertinent to the task. Locate the files of interest, select them, and then click

Attach. More than on file can be added simultaneously using the Ctrl or Shift keys. Multiple files of varying file types are acceptable.

7. Click **OK** to add the task.

The task is added to Task Manager. An email is sent to the assigned user to alert them about it and is similar to the following:

```
Task: 0

Description: Edits from project: Retail_Capabilities_Showcase, Tab:
AutoExtract, Job ID: 11

Status: Open

Assigned To: TMUser

Created By : TMUser

Created On :

DSA: Retail_Capabilities_Showcase

DSA Step: Item Standardization

Data Lens: Demo_Retail_Apparel

Task Detail:

Could you please research why the data lens does not recognize the Itty
Bitty Kitty character?
```

Chapter 4

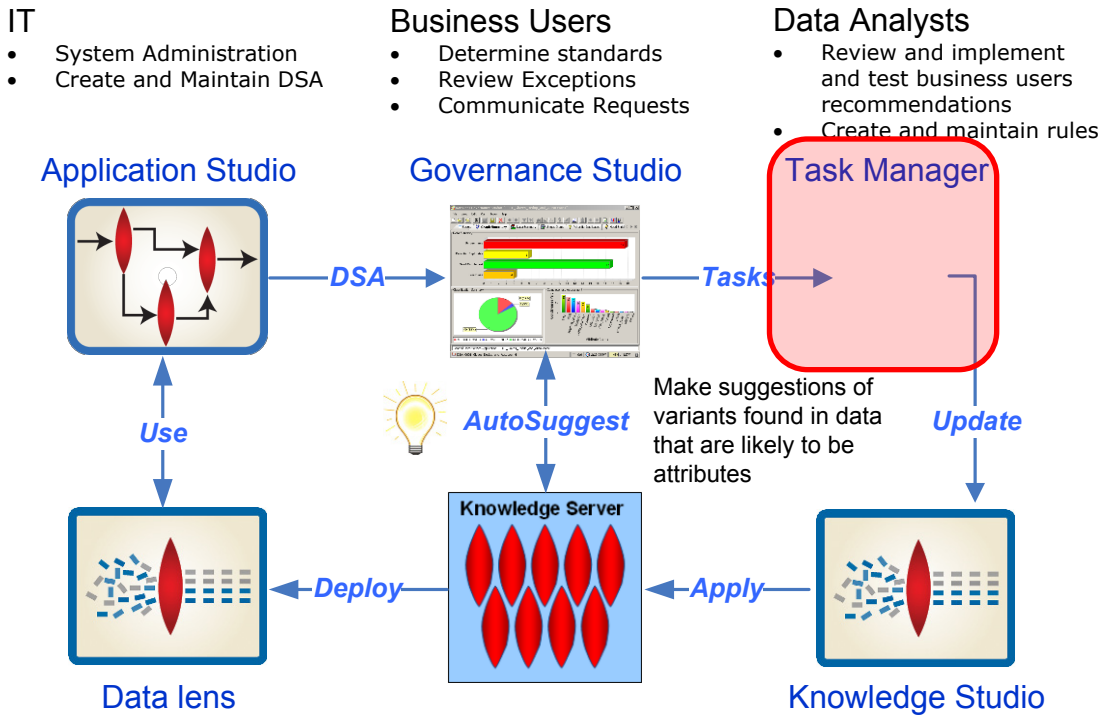
Managing and Processing Tasks

In this chapter

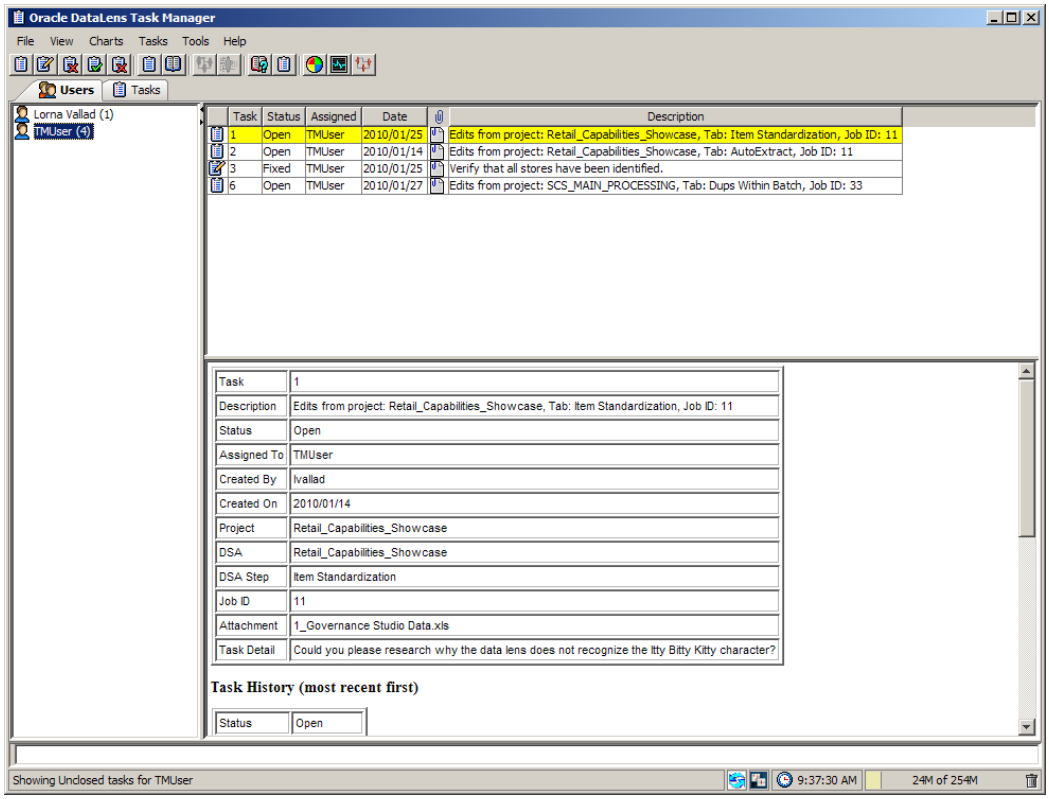
- Managing Tasks 28
- Knowledge Studio Processing 34

Managing Tasks

The main feature of the Task Manager is the ability to view users and tasks, chart all available task data, and monitor task progress.



The Data Analyst opens up the Task Manager to review all tasks, both open and completed, as shown in the following figure:



In this example, the Governance Studio task creation step the Business User created a task with was seven with Job ID 89 and requested the Data Analyst to add the AutoSuggest variants to the data lens.

Viewing Tasks

Upon opening Task Manager, all tasks are displayed and are categorized by user on the default **Users** tab.

The way the tasks are viewed can be changed by using the selections on the **View** menu. The selections on this menu isolate the tasks by the status and displays the only the tasks that match the view selection. For example, when you select **View Closed Tasks** only the tasks that have been closed are displayed.

> Note: The default for a Task Manager user is that they can only change their own tasks though they view the tasks assigned to others.

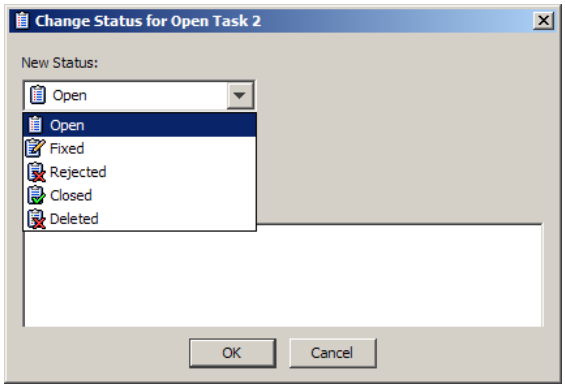
You can review the attachment and comments in order to take action on the task. Once you have reviewed the task and have completed the action, you can complete the task by changing the status to something other than open.

Changing Task Status

You can change the status of any task including closed and deleted. The status selections are open, fixed, rejected, closed, and deleted. It is recommended that you create criteria for all statuses other than open to ensure standardization across Task Manager Users.

To change the status of task, select the task from the **Users** or **Tasks** tab, then right-click and select **Change Task Status**.

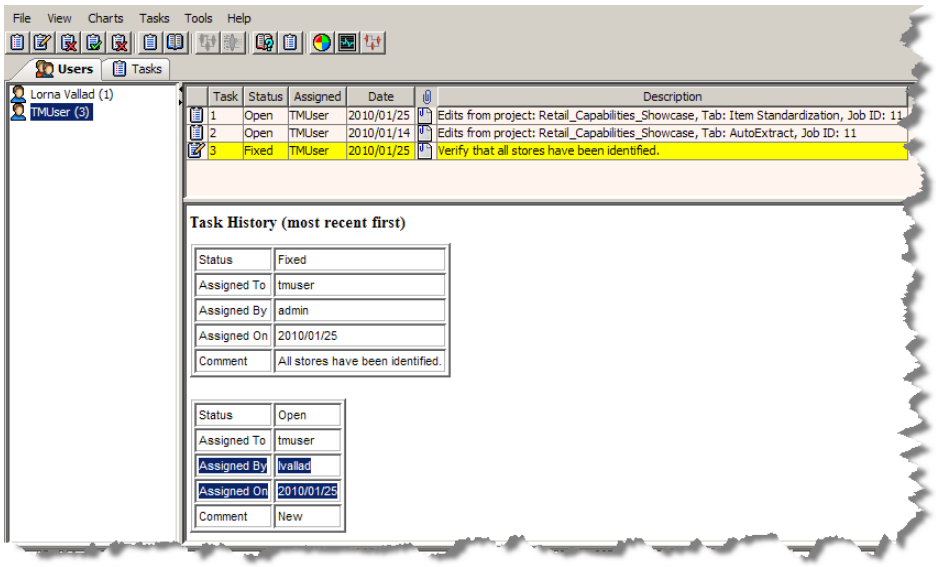
Tip: If the task you want to change is not listed, change the view to **View All Tasks** from the **View** menu.



Select a new status and/or reassign the task. You must enter a comment regarding the status change. Click **OK** to immediately effect the changes to the task.

Note: You must have permission to change the status of a task you did not create or you must be logged in as TMUser.

All tasks have a full status history that details all changes to the task including which user took the action. The task history is shown in the main task information pane and is chronological order with the most recent action first as in the following example:



Reviewing Task Attachments

You can now download the attachment to review the requested changes by selecting a task then right click and select **Download Attachments**. You are prompted to locate the directory that you want the attached files to be copied to; all attachments to the task are copied to the selected directory.

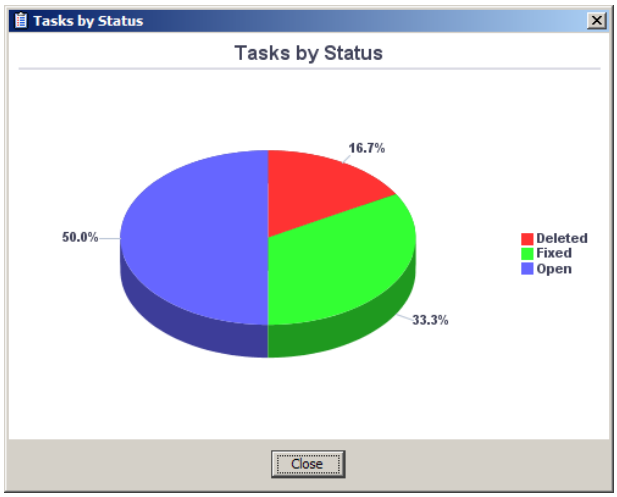
This is useful in the case of a spreadsheet that was created using the Governance Studio AutoSuggest feature. For example, if you download and open an attached Excel spreadsheet, you will see the row that was created by AutoSuggest. The following figure shows the left section of the row with the data lens name with the variants colorized (the spreadsheet is not normally colorized).

The following figure shows the right section of the row with the Suggestions colorized. The attribute name and attribute text with the full form term and the suggested word is in parenthesis "(suggested)".

At this the point, if the Data Analyst agrees with the suggested changes, then the changes should be affected in the Knowledge Studio.

Charting Tasks

You can generate and review tasks several different ways using the **Charts** menu. Charting by task status, user, DSA, or data lens all produce a pie chart illustrating the number of tasks relating to the selection. For example, the following is charting all tasks by their status.

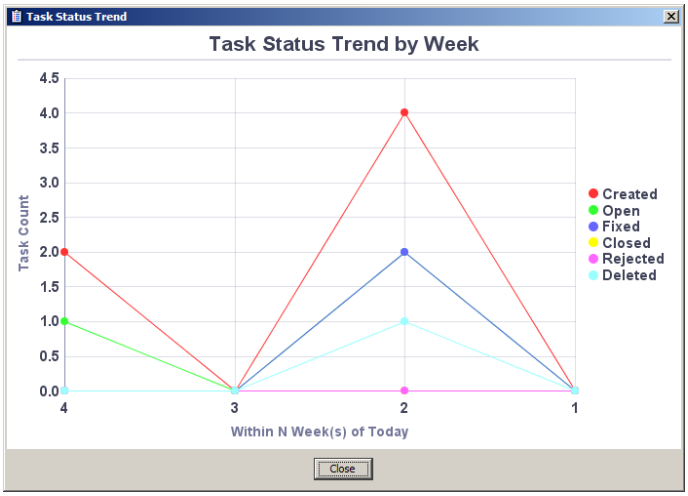


Charting by Trend

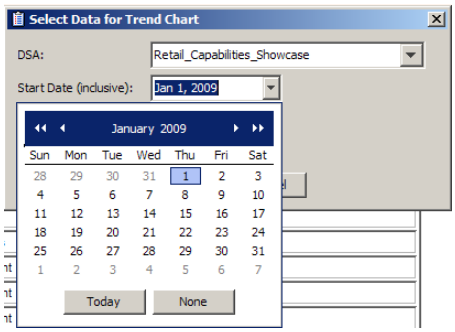
Additionally, you can chart tasks using trend analysis.

> Note: The charting options are only active when the trend analysis option of the output step of the DSA in the Application Studio has been selected. For more information about setting this option, see the *Oracle Product Data Quality Application Studio Reference Guide.*

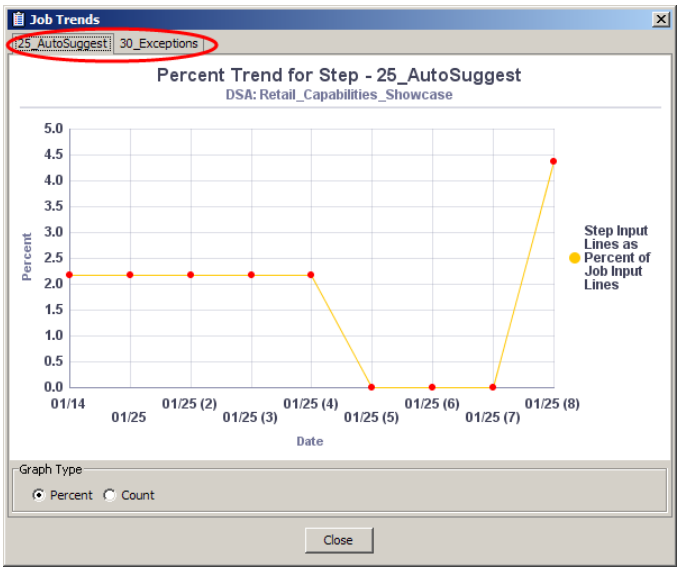
The following figure shows the trend that tasks take over the course of *N* number of weeks of the current day:



You can also chart using all DSA jobs that have run successfully by selecting **DSA Job Trend**.



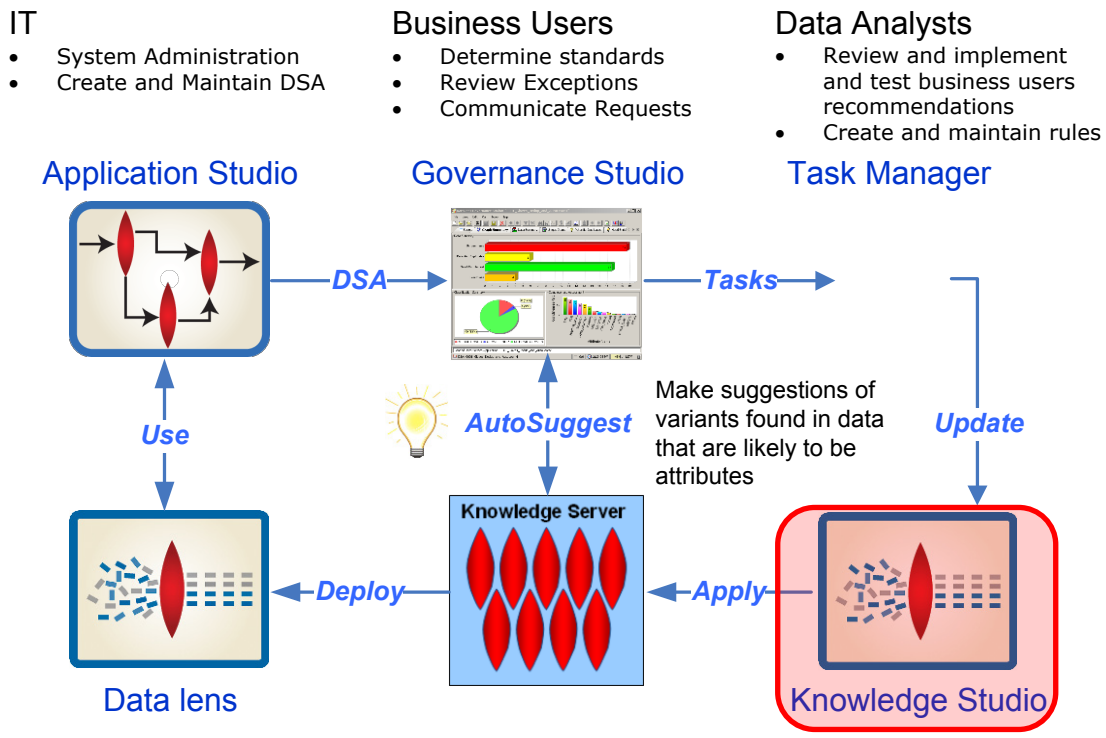
Select a DSA and the start and end date that you want to analyze and click **OK**. The chart that is generated will be similar to the following:



The example DSA had two output steps configured for trend analysis so a tab for each is created so that the data can be reviewed independently. The view of the data can be changed from a percentage of the input lines for a step in a job to simply a count of the step input lines.

All charts can be saved to a PNG or JPG file by right-clicking in the chart and selecting one of these file types.

Knowledge Studio Processing



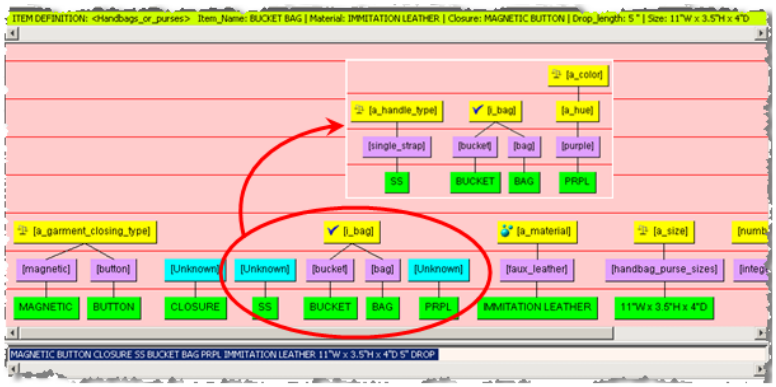
After reviewing the requested changes as a result of a task and validating their correctness, the Data Analyst updates the data lens and applies them to Oracle Product Data Quality using the Knowledge Studio.

For example, the following table summarizes the requested changes to an apparel data lens:

Item Definition	Attribute	Phrase	Term	Text (Variant)
Handbags_or_purses	Color	[a_color]	[purple]	PRPL
Handbags_or_purses	Handle_type	[a_handle_type]	[single_strap]	SS

The process to make changes identified by a task is to open the appropriate data lens in the Knowledge Studio, effect the changes, save them, and deploy the changed data lens for use in the Governance Studio.

In this example, either you could enter the full description that includes the variants or the individual text for the variants would be updated in the data lens. The following figure shows the data lens with the missing data and the full description entered into the data lens:



Appendix A

Installing the Client Software

Oracle Product Data Quality uses a concept called Java Web Start to initially install and maintain the current version of the software on your client desktop. The process requires you to access the Oracle DataLens Server to initiate the connection and download the software.

You download and install the Oracle Product Data Quality client applications using Java Web Start by browsing to the installation page for your Oracle DataLens Server as follows:

1. Using Microsoft Internet Explorer, browse to one of the following URLs as appropriate for your server:

   Note: If you setup a different port number for your application server other than 2229, you must use that port number in the following URL when browsing to the Oracle DataLens Server to download the client applications.

   32-bit

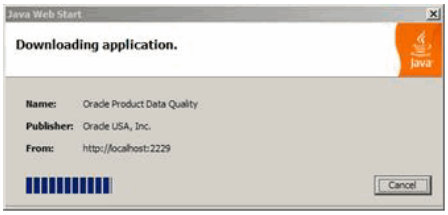
   http://<server>:2229/datalens/datalens.html

   64-bit

   http://<server>:2229/datalens/datalens64.html

   Where <*server*> is the hostname of the Oracle DataLens Server

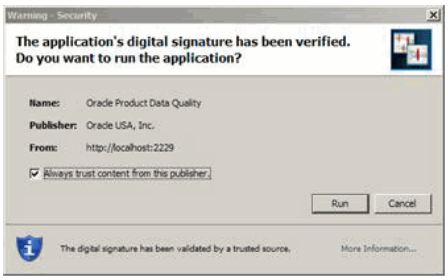
The application download and installation begins. If you do not have a supported Java environment on the target installation machine the Java Web Start program automatically redirects you to a Java download site and begins a Java Runtime installation.



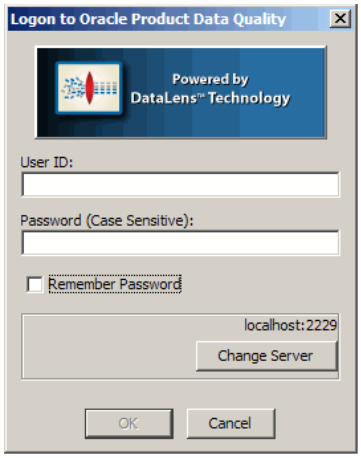
2. If the preceding Java Web Start message is not displayed, you must initiate a connection and download the software by browsing to:

   http://<server>:2229/datalens/datalens.jnlp

   Oracle Product Data Quality files are digitally signed by a trusted source so the following security warning is displayed.



3. To avoid the security dialogue in the future you can select the **Always trust content from this publisher** check box.

4. Click **Run** to continue and complete the installation.

   The Oracle Product Data Quality log on dialog is displayed.