

**Oracle® Enterprise Data Quality for Product Data**

Task Manager Reference Guide

Release 11g R1 (11.1.1.6)

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Oracle Enterprise Data Quality for Product Data Task Manager Reference Guide, Release 11g R1 (11.1.1.6)

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# Preface

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

Review of the following Enterprise DQ for Product documentation prior to the use of this guide is recommended:

To understand all of the features presented, you must use this reference guide in conjunction with the Enterprise DQ for Product documents listed in "[Related Documents](#)" on page 3-vi.

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

## Audience

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

A thorough understanding of the material in this guide is required for the following customer personnel:

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

## Documentation Accessibility

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## Related Documents

For more information, see the following documents in the documentation set:

- The *Oracle Enterprise Data Quality for Product Data Getting Started Guide* provides information about how to get started with EDQP.
- The *Oracle Enterprise Data Quality for Product Data Application Studio Reference Guide* provides information about creating and maintaining Data Service Applications (DSAs).
- The *Oracle Enterprise Data Quality for Product Data Knowledge Studio Reference Guide* provides information about creating and maintaining data lenses.
- The *Oracle Enterprise Data Quality for Product Data Governance Studio Reference Guide* provides information about building projects to analyze your transformed data, create reports to show the quality of your data, and identify missing attributes.

See the latest version of this and all documents in the Oracle Enterprise Data Quality for Product Data Documentation Web site at

[http://docs.oracle.com/cd/E35636\\_01/index.htm](http://docs.oracle.com/cd/E35636_01/index.htm)

## Conventions

The following text conventions are used in this document:

<b>Convention</b>	<b>Meaning</b>
<b>boldface</b>	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, text that you enter, or a file, directory, or path name.
<b>monospace</b>	Boldface, monospace type indicates commands or text that you enter.

# Introduction

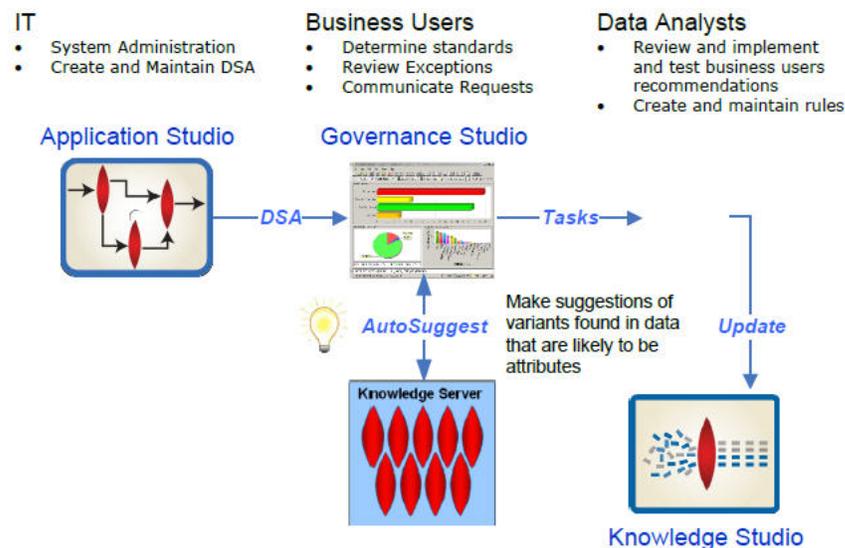
The Task Manager manages tasks generated from the Task Manager or tasks generated directly from the Governance Studio or Administration Web page. You can create tasks to request action from data analysts or IT personal to make changes to existing data lenses and Data Service Applications (DSA), such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

This chapter contains the following:

- [Task Flow](#)
- [Starting the Task Manager](#)
- [Understanding the Client Workspace](#)
- [Task Manager User Role Administration](#)

## Task Flow

Enterprise DQ for Product (EDQP) 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 Enterprise DQ for Product knowledge process.



**Business Users**

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.

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**Note:** The Data Analyst is denoted by Task User in the examples in this document.

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**IT**

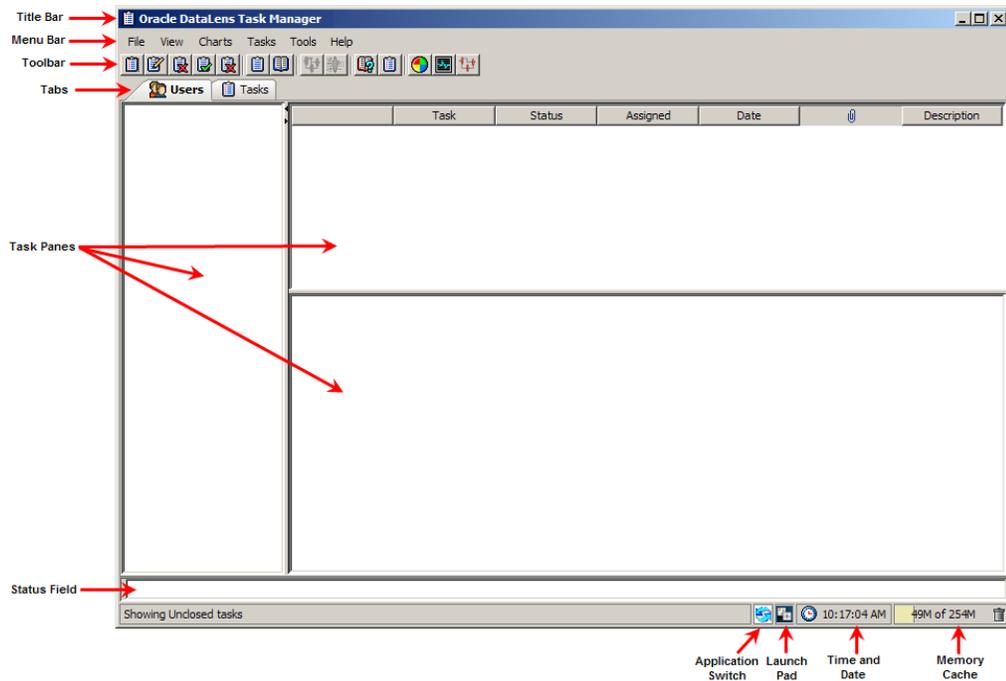
Uses Task Manager to receive requests and the Application Studio to make process flow changes.

## Starting the Task Manager

You start your Oracle DataLens Server, and then use the Welcome Launch Pad to start the Task Manager by clicking the **Task Manager** button. For details, see *Oracle Enterprise Data Quality for Product Data Getting Started*.

## 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 Enterprise DQ for Product application used.

### Oracle Enterprise Data Quality for Product Data Launch Pad

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

### Time and Date

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

### 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.

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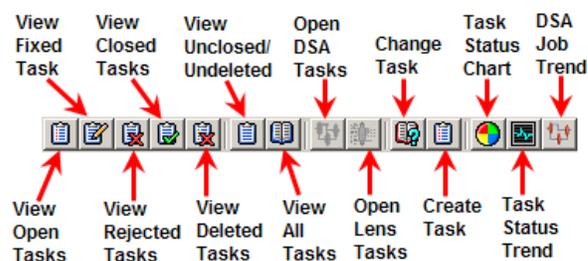
**Note:** This feature is only used for system diagnosis and should not be used unless requested by Oracle Customer Support.

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## 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 on 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.

**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

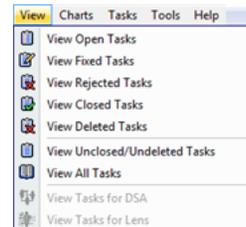
View all tasks.

### 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

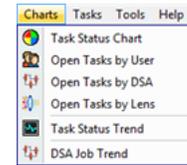
Chart all open tasks by data lenses.

### 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 3-2.

### Create New Task

Creates a task and assigns it to a user. For more information, see "[Creating a Task in Task Manager](#)" on page 2-1.



## Tools Menu

### Open Oracle DataLens Governance Studio...

Starts the Enterprise DQ for Product Governance Studio. For more information, see the *Oracle Enterprise Data Quality for Product Data Governance Studio Reference Guide*.

### Open Oracle DataLens Application Studio...

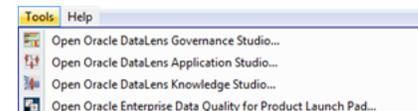
Starts the Enterprise DQ for Product Application Studio. For more information, see the *Oracle Enterprise Data Quality for Product Data Application Studio Reference Guide*.

### Open Oracle DataLens Knowledge Studio...

Starts the Enterprise DQ for Product Knowledge Studio. For more information, see the *Oracle Enterprise Data Quality for Product Data Knowledge Studio Reference Guide*.

### Open Oracle Enterprise Data Quality for Product Data...

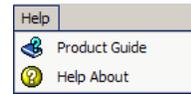
Starts the Oracle Enterprise Data Quality for Product Data Launch Pad so that you can start other applications and the Enterprise DQ for Product Oracle DataLens Server Administration Web pages.



## Help Menu

### Product Guide

Opens a list of Enterprise DQ for Product 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:

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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 while clicking on a task or not. The functions not previously described are:

#### Download Attachments

Downloads the attachment of the selected task to your local computer. This option is only displayed if the selected task has attachments.

#### Email User

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

	Change Task Status	s
	Create Task	t
	Download Attachments	d
@	Email TMUser	e
	View Open Tasks	o
	View Fixed Tasks	f
	View Rejected Tasks	r
	View Closed Tasks	c
	View Deleted Tasks	d
	View Unclosed/Undeleted Tasks	n
	View All Tasks	a

## Task Manager User Role Administration

You must ensure that all users that will be using the Task Manager are granted the 'Task Manager' or 'Task User' role. All user roles, including the two Task Manager roles, are managed using the Oracle DataLens Server Role Administration web page. For details about creating and maintaining users and user roles, see *Oracle Enterprise Data Quality for Product Data Oracle DataLens Server Administration Guide*.



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## Creating Tasks

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 created in the Governance Studio and can then be managed in Task Manager along with those created in Task Manager.

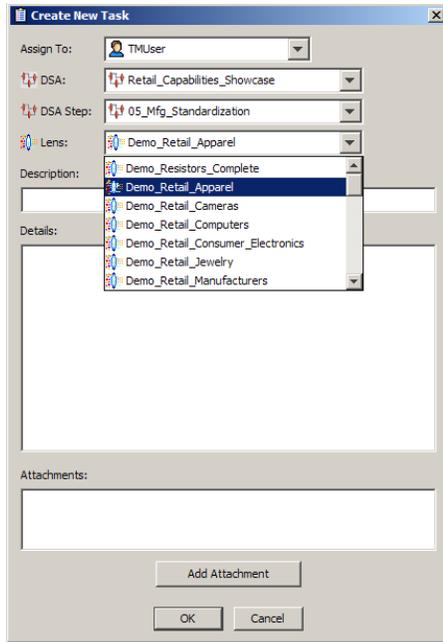
This chapter includes the following:

- [Creating a Task in Task Manager](#)
- [Creating a Task from an Output Tab](#)
- [Creating a Task from Checked Rows](#)
- [Creating a Task from an AutoSuggest Tab](#)
- [Creating a Data Enrichment Task](#)

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

### 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 as follows:

1. Select the user that you want assign the task to.
2. Using the **DSA**, **DSA Step**, and **Lens** drop-down lists, select what you would like the user to do. When you select a DSA, the **DSA Step** and **Lens** drop-down lists are populated with the corresponding selections based on the selected DSA. The **DSA Step** drop-down list is active only when a DSA has been selected.
3. Enter a description for the task for display in all task lists.
4. 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.

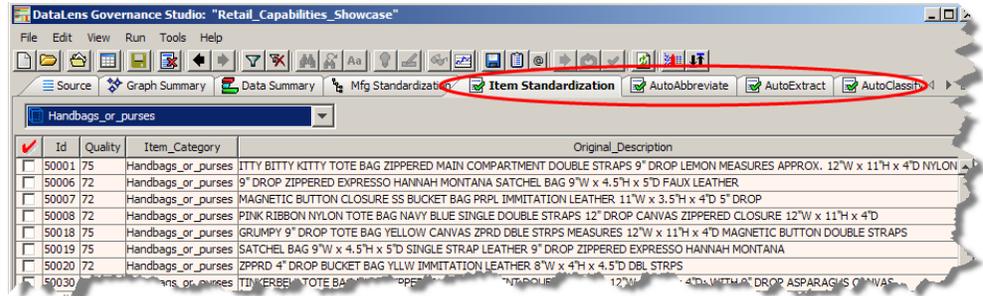
5. Optionally, you can use the **Add Attachment** button to add any supporting files that are pertinent to the task. Locate the files of interest, select them, and then click **Attach**. More than on file can be added simultaneously using the Ctrl or Shift keys. Multiple files of varying file types are acceptable.
6. 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:

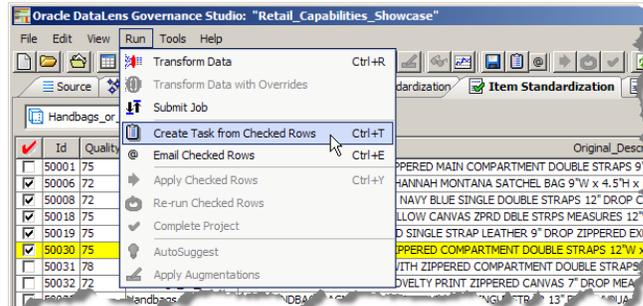
```
Task: 0
Description: Edits from project: Retail_Capabilities_Showcase, Tab: AutoExtract,
Job ID: 11
Status: Open
Assigned To: Task User
Created By : Task User
Created On :
DSA: Retail_Capabilities_Showcase
DSA Step: Item Standardization
Data Lens: Demo_Retail_Apparel
Task Detail:
Please see why the data lens does not recognize the Itty Bitty Kitty character?
```

## Creating a Task from an Output Tab

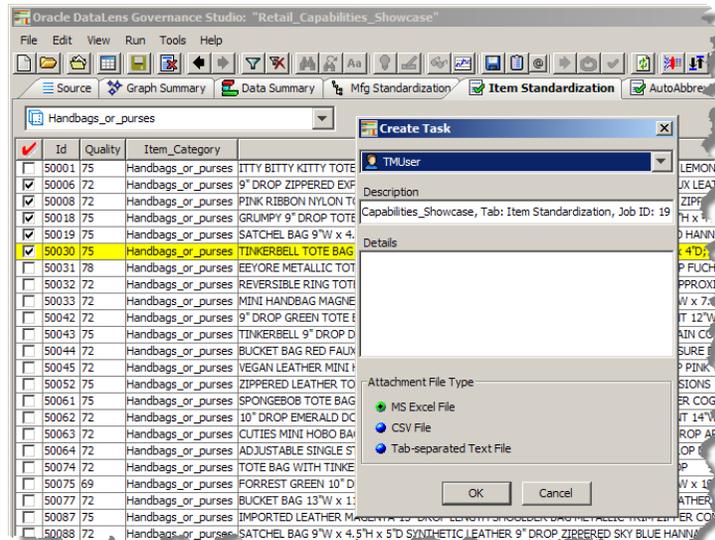
In Governance Studio, the Review, Approve, and Route Output tabs are identified by a green check mark icon adjacent to the name of the tab. These tabs contain output data in tabular format that correspond to a DSA output step.



Data in these tabs may be selected to use to create a task, 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 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:



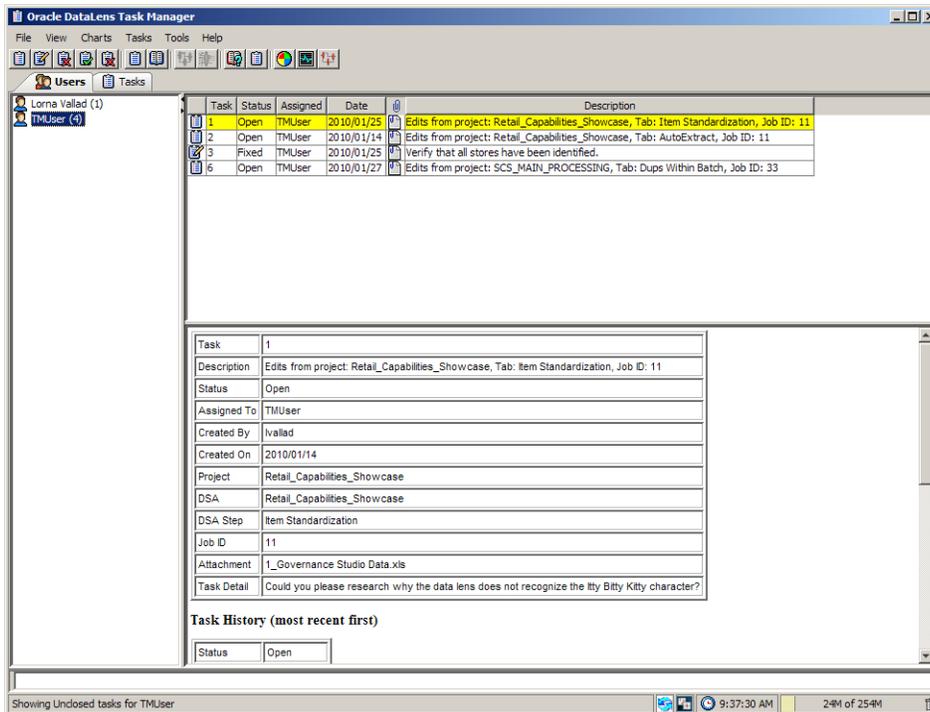
**Note:** This **Create Task** dialog box is very different than the one described in "Creating a Task in Task Manager" because the DSA, DSA step, and data lens are already known.

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**.

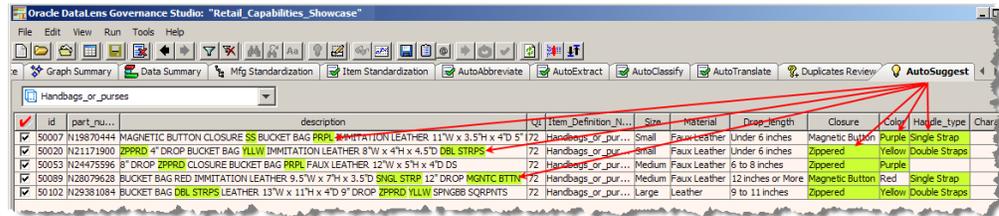
The task is added and the assigned user receives an email advising them that they have a task to complete.

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

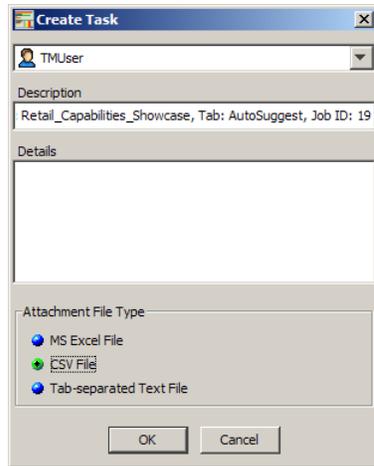


## Creating a Task from Checked Rows

Another way to create a task in Governance Studio is to select one or more rows for the Task User to update in 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 create a task from a set of rows, check the rows you want included in the task. From the menu, select **Run** and then click **Create Task from Checked Rows**.



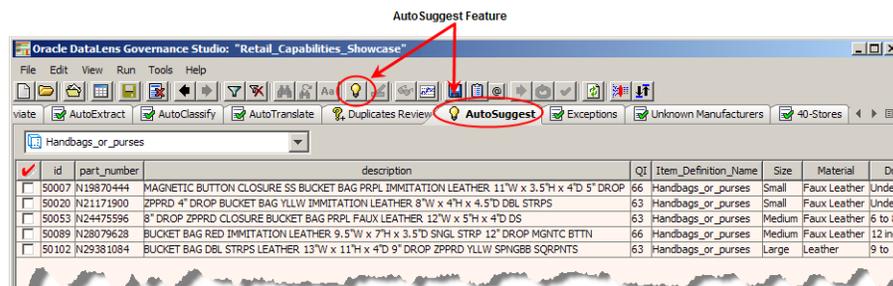
You complete this dialog box as described in "Creating a Task from an Output Tab" on page 2-3 though the **Description** field is automatically populated for you with the name of the DSA, tab name, and the Job ID that it is assigned.

## Creating a Task 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 Task User to update the data lens in the Knowledge Studio. This section describes the use of AutoSuggest results for Task Manager processing.

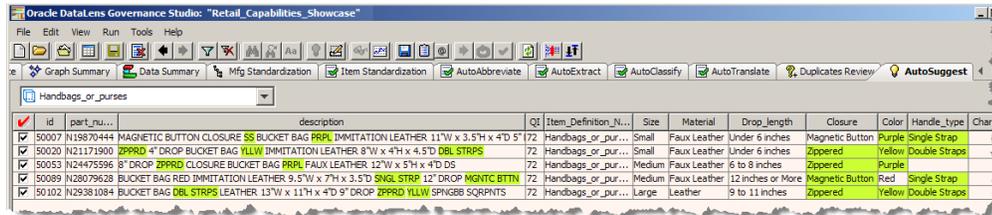
A typical example of the AutoSuggest process is a Business User presented with a set of exceptions that did not meet the Quality Index threshold because some of the attributes were not present.

You can use the AutoSuggest feature in Governance Studio to leverage the Enterprise DQ for Product 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 colored in green as shown in the following figure:



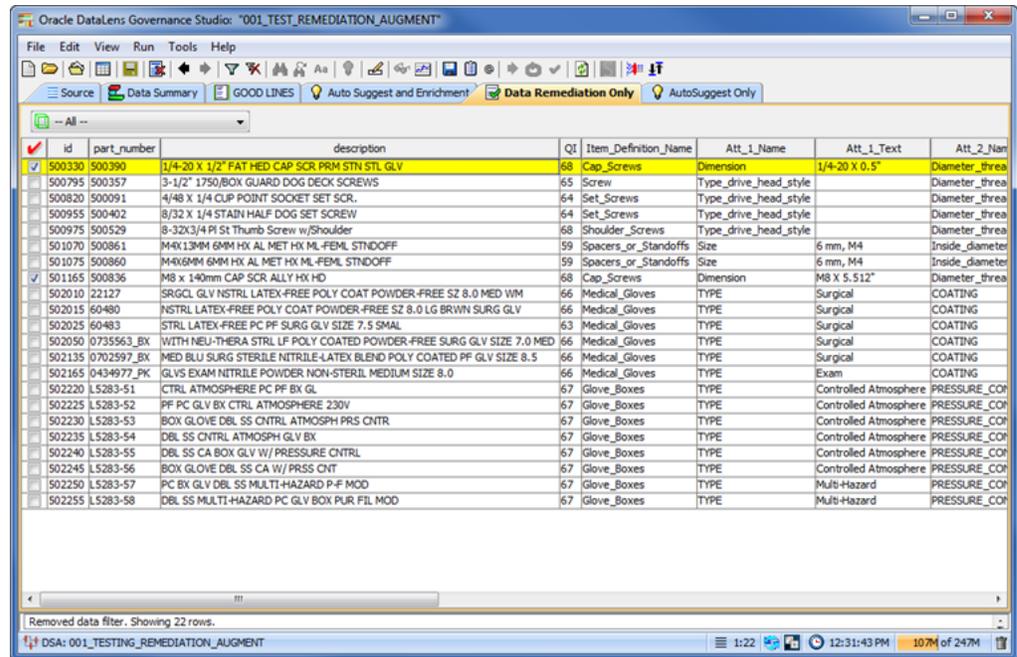
Several operations are allowed in the AutoSuggest table to process your data further and make it easy to edit or accept suggestions. The AutoSuggest table allows you to accept or reject suggestions by right click over it and select one of the Switch Augmentation options. The rejected suggestion is highlighted in pink showing that the attribute value has been rejected.

When you have finished working with your AutoSuggestions, create the task as described in ["Creating a Task from Checked Rows"](#) on page 2-4 ["Creating a Task from Checked Rows"](#)

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

## Creating a Data Enrichment Task

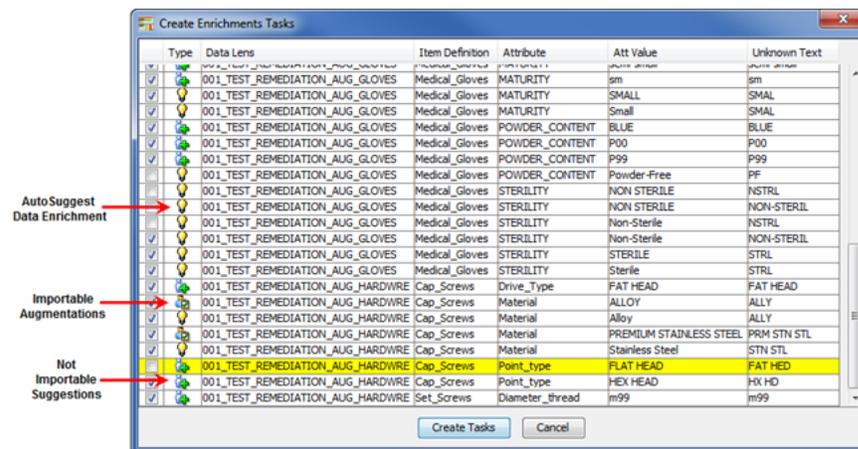
The "Data Remediation" Output tabs are identified by the green check mark icons on the tab. These types of tabs contain tables of output data and correspond to a DSA output step with the output type of 'Data Remediation'. Data in these tabs may be selected for output to a file, edited, emailed to others, or run as input to a synchronous job. The following figure shows an example of a 'Data Remediation' Output tab.



You can create one or more tasks from all of the data enrichment suggestions (AutoSuggestions, User suggestions both importable and not importable) that you have effected in your project. You then import into your data lens (or all data lenses in a data lens group) in the Knowledge Studio to update its semantic knowledge thus completing the data enrichment process.

To create an enrichment task from any project tab:

1. Remediate your data using the data remediation techniques in Governance Studio including adding valid values and AutoSuggest augmentation.
2. (Optional) On any AutoSuggest tab, approve or reject the AutoSuggest suggestions.
3. Click the **Apply Enrichments** button on the toolbar.



All of the available types of data enrichment are displayed including AutoSuggestions and both types of user suggestions, importable and not importable. Each of the three types is denoted with a different icon, as in the preceding example, so make identification easy. The default is that all enrichments

are selected for task creation though this example shows that you can pick and choose items for enrichment.

4. You can deselect any of the data enrichments and they will not be included in the task.
5. Click **Create Tasks**.

The task is created with you assigned to it and the task number is displayed in the Status Field. The file that you can import into your data lens in the Knowledge Studio is stored on your Oracle DataLens Server.

## Managing and Processing Tasks

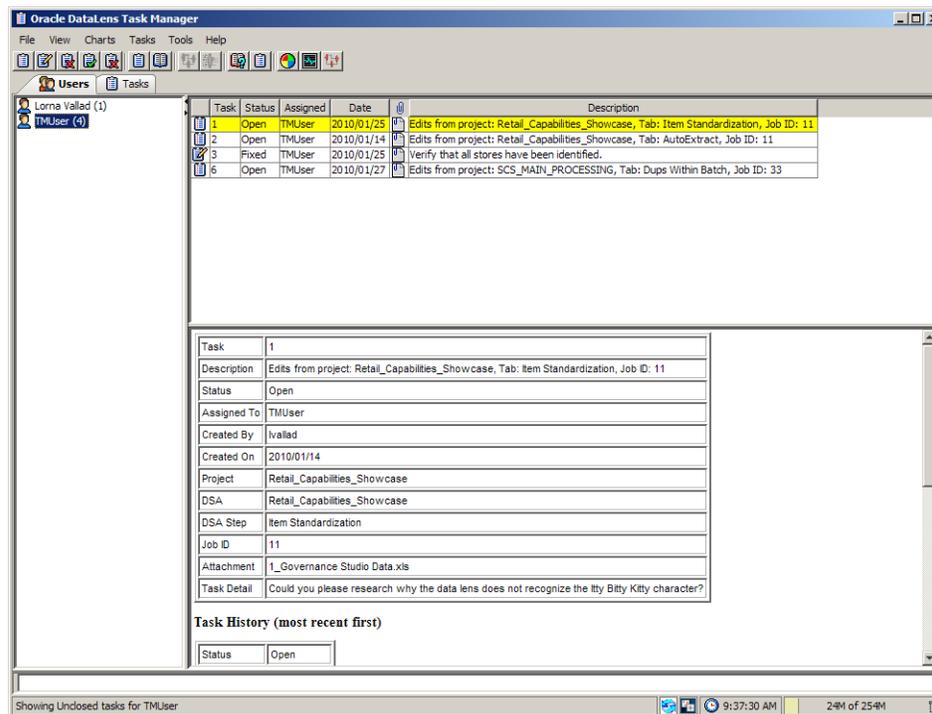
This chapter explains how to manage your tasks in Task Manager and how to process them in Knowledge Studio including the following:

- [Viewing Tasks](#)
- [Changing Task Status](#)
- [Reviewing Task Attachments](#)
- [Charting Tasks](#)
- [Knowledge Studio Processing](#)

For complete details about using the Knowledge Studio application, see the *Oracle Enterprise Data Quality for Product Data Knowledge Studio Reference Guide*.

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

You start Task Manager from the to review all tasks, both open and completed, as shown in the following figure:



In this example, the Governance Studio task creation step created is Task 1 with Job ID 11 and requested the Task User to add the AutoSuggest variants to the data lens so that it will recognize variations of the source input.

## 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.

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**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.

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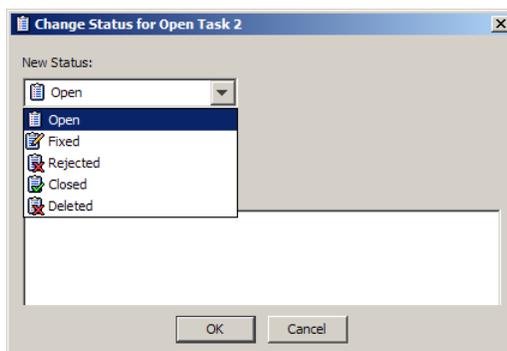
You can review the attachment and comments in order to take action on the task. Once you have reviewed the task and have completed the action, you can complete the task by changing the status to something other than open.

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

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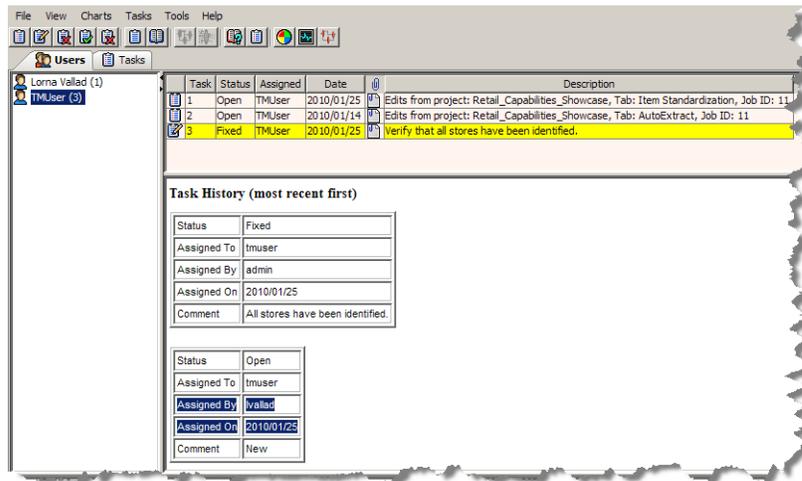
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**Note:** You must have permission to change the status of a task you did not create or you must be logged in as Task User.

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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 colored (the spreadsheet is not normally colored).

	A	B	C	D
1	Lens	id	part_number	description
2	Demo_Retail_Apparel	50007	N19870444	MAGNETIC BUTTON CLOSURE SS BUCKET BAG PRPL IMITATION LEATHER 11"W x 3.5"H x 4"D 5" DROP

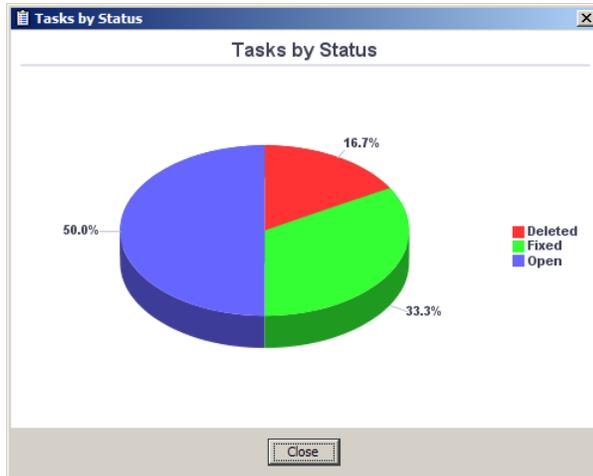
The following figure shows the right section of the row with the Suggestions colored. The attribute name and attribute text with the full form term and the suggested word is in parenthesis "(suggested)".

M	N	U	P	R	S	T
Att 4 Name	Att 4 Text	Att 5 Name	Att 5 Text	Att 6 Name	Att 6 Text	Att 7 Name
Closure	Magnetic Button	Color	Purple (suggested)	Handle type	Single Strap (suggested)	Characters

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

## Charting Tasks

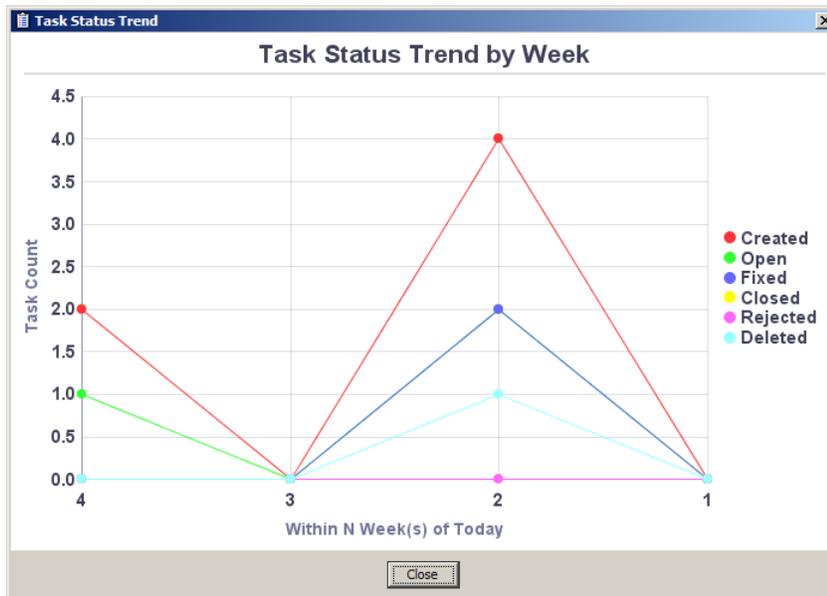
You can generate and review tasks several different ways using the **Charts** menu. Charting by task status, user, DSA, or data lens all produce a pie chart illustrating the number of tasks relating to the selection. For example, the following is charting all tasks by their status.



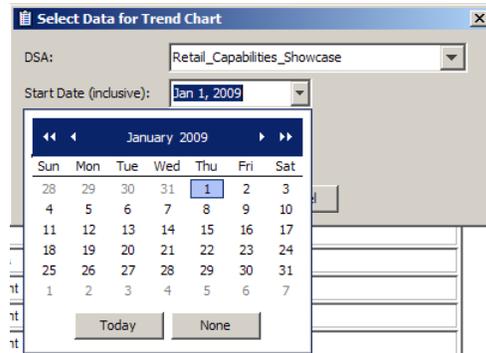
### Charting by Trend

Additionally, you can chart tasks using trend analysis; this option is active only 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 Enterprise Data Quality for Product Data Application Studio Reference Guide*.

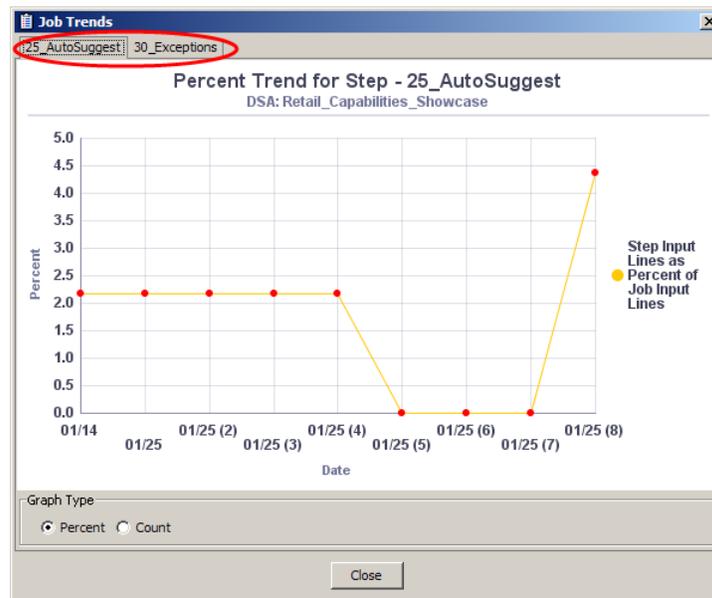
The following figure shows the trend that tasks take over the course of *N* number of weeks of the current day:



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 Task User updates the data lens and applies them to Enterprise DQ for Product 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

Item Definition	Attribute	Phrase	Term	Text (Variant)
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:

