Oracle Fusion Cloud Human Resources

How do I configure the reporting task types in journeys?

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1 Overview

Considerations for Using Report, Analytics, and Visualization Configuration Task Types

This table shows the considerations for each task type.

Task Type - Report (BI Publisher Report)	Task Type - Analytics (OTBI Analysis)	Task Type - Analytics (Visualization Configuration)
Available in guided and non-guided journeys.	Only available in guided journeys.	Only available in guided journeys.
Create a custom data model and RTF template.	Utilize the existing subject area when creating an analysis.	Combine OTBI analysis with enhanced, Redwood-themed data visualization. Requires prior creation and maintenance of a visualization configuration.
When used in a guided journey, the report output can't be created as a document record. When used in a non-guided journey, if the document type is specified, the report output is automatically created as a document record for that document type. The document record is created in the task performer or journey assignee's document records based on how you have configured it.	The analysis output can't be created as a document record.	The analysis output can't be created as a document record.

Pass Dynamic Parameters to Reports and Analyses

These are some points to note when you pass parameters from individual Redwood product pages.

- Refer to the respective product documentation for the list of parameters that are passed from individual Redwood pages.
- The parameter name and value are case sensitive.
- The parameter value in the curly brackets should match the value specified in the respective product documentation.
- The parameter name used in the report path should match with the one used in the data model.

2 Configure Report Task Type

Introduction

The Report task type in a journey enables task performers to view a BI Publisher report when performing the task.

For example, a Human Resources (HR) specialist can view all the data collected as part of the recruiting process or view the performance rating report during an exit interview.

Note: For task performers to view the report, you need to provide them access to the BI Publisher report.

Parameters to Include in the Report Path for Journeys

This is what you can include in the report:

- Specify the BI Publisher report folder path followed by the report name concatenated with **/**.
- Include optional parameters in the format **parameter name={parameter value}**.
- Use the prefix **?** before the first parameter followed by **&** before additional parameters.
- Remove the **+** character in the report path.

This table shows the parameters that you can include in the report path for non-guided journeys:

Parameter Name	Parameter Value	What it Does
P_ALLOCATED_TASK_ID	`{AllocatedTaskId}`	Passes the ID of the assigned task to the report.
P_ALLOCATED_CHECKLIST_ID	`{AllocatedChecklistId}`	Passes the ID of the assigned journey to the report.

You need to pass only the parameter shown in the table. The `PersonId` is implicitly passed based on the Allocated Task ID or the Allocated Checklist ID.

Let's say you specify this in the report path:`/Samples/SalaryReport.xdo?P_ALLOCATED_TASK_ID={AllocatedTaskId}`, the application passes the current assigned task's ID to the report as a parameter which the report can use to filter the results.

Alternatively, if you specify this in the report path:`/Samples/SalaryReport.xdo?P_ALLOCATED_CHECKLIST_ID={AllocatedChecklistId}`, the application passes the current assigned checklist ID to the report as a parameter which the report can use to filter the results.

You can also use both the parameters. For example, `/Samples/SalaryReport.xdo?P_ALLOCATED_CHECKLIST_ID={AllocatedChecklistId}&P_ALLOCATED_TASK_ID={AllocatedTaskId}`

If you don't specify any parameters, then the default layout and output format are used to render the report. For example, if you specify this:`/Custom/Reports/ChecklistCompletionReport.xdo` the application runs the report with the default options and generates the output in PDF format.

Only PDF report output format is supported. If the Document Type is specified, the generated report is automatically created as a document record for that document type. The document record is created either in the task performer or journey assignee's Document Records based on how you have configured it.

For more information about OTBI reports, see the Administering Analytics and Reports for HCM guide on the *Oracle Help Center*.

How You Open BIP Report on Same Assigned Journey Page

You can configure the option to open the BIP report for a Report task type in a panel drawer instead of a new browser window. To do this, follow these steps:

1. Go to **My Client Groups > Journey Templates**.
2. Click the journey name that has the task where you want to open the BIP report on the same page.
3. Click the Edit icon for the task name where you want to open the BIP report on the same page.
4. On the Overview tab, select the **Open report on same tab as task** check box.
5. Click **Save**.

Note:

- This configuration option isn't available for guided journeys as the BIP report in a guided journey task opens in a panel window by default.
- The option to download the report isn’t available currently.

3 Configure Analytics Task Type

Configure Analytics Task Type in Journeys

The Analytics task action type in a journey enables task performers to view an OTBI analysis when performing the task.

For example, a Human Resources (HR) specialist can view all the data collected as part of the recruiting process or view the performance rating report during an exit interview.

Ensure that you provide task performers access to the OTBI analysis, otherwise they can't view the analysis.

Task Type Use

- Specify the OTBI analysis path and parameter to display analytics.
- When setting up the task, you can specify the type of analysis parameters you want to pass at run time. You need to pass the parameters in the **OTBI Analysis Path** field with the name of the attribute in the OTBI subject area along with the object name.

Task Type Example

View the analysis displaying person journey details in a guided journey task. The OTBI Analysis path for this example would be something like this:

```
/shared/Custom/Human Capital Management/Person Checklist Details/Checklist Category
 Heatmap&col1="Worker"."Person ID"&val1={PersonId}
```

Here's another sample URL that passes the Assignment ID and Person ID parameters:

```
/shared/Custom/Human Capital Management/Workflow Notifications/Checklist Category
 Heatmap&col1="Worker"."Assignment ID"&val1={AssignmentId}&col2="Worker"."Person ID"&val2={PersonId}
```

Note: The Analytics task type is available only for guided journeys.

4 Configure Visualization Configuration Analytics Task Type

Set Up Visualization Configuration for Analytics Task in Journeys

Follow these steps to create the visualization configuration and associate it with the Analytics task:

1. Create the visualization configuration that you want to add to the analytics task. For more information, see this topic: *How do I use the Data Visualization Configuration tool?*
2. Associate the visualization configuration that you created with the Analytics task. To do this, follow these steps:
   a. Go to **My Client Groups > Journeys Setup > Guided Journey**.
   b. Create a guided journey or click the guided journey name in the list where you want to create the Analytics task.
   c. In the Tasks section, click **Add**.
   d. Enter the task name and other details.
   e. Select **Analytics** for the task type and **Visualization Configuration** for the analytics type.
   f. Enter the visualization path as **path=<visualization configuration name>** where **<visualization configuration name>** is the name of the visualization configuration that you created in step 1. For example, enter **path=CDRM_8015**. You can also enter parameters, for example, **path=CDRM_8015&”Worker”.”PersonId”={PersonId}**
   g. Click **Save**.

After you finish the steps, users can view the Oracle Transactional Business Intelligence (OTBI) analysis with supported parameters directly in a journey task by using the Redwood theme.