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HFM TASK AUTOMATION

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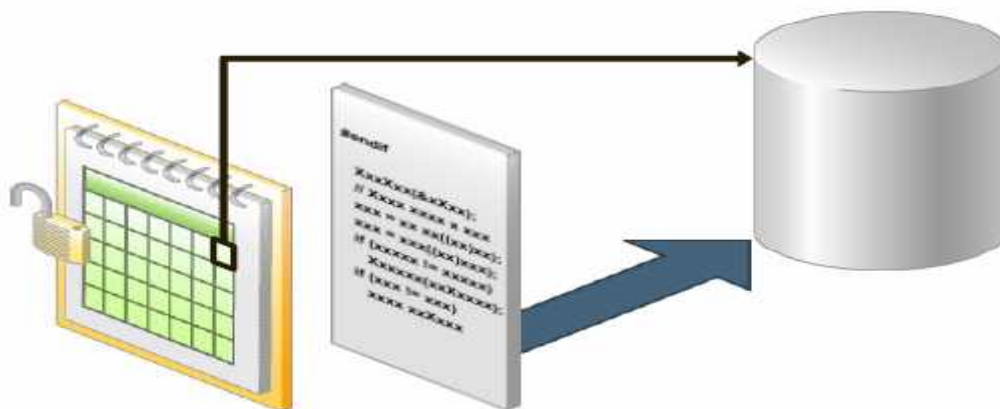
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TASK AUTOMATION

Task Automation is a Web-based module that provides a method for chaining a series of tasks into a taskflow. You can use Task Automation to automate tasks that you commonly perform using Financial Management. When you work with Financial Management, you routinely perform tasks such as **loading data, running calculations and translations, consolidating parent entities, and extracting data through data extract or extended analytics**. You can create and maintain task flows to perform Financial Management operations and schedule critical tasks to be run as required.



Task automation provides designated users the ability to schedule critical Financial Management tasks to be run as required



TASK AUTOMATION

Available Financial Management Tasks

You can use Task Automation to automate these Financial Management tasks:

- Allocate
- Calculate
- Calculate Contribution
- Translate
- Consolidate
- Load Journals
- Extract Journals
- Load Data
- Extract Data
- Execute Journal Action
- Extended Analytics
- Process Management

Note that there are a few areas in which automation is not available, specifically, certain loading tasks such as loading metadata, security, and member lists.



TASK AUTOMATION

Uses for Task Automation

- Translating and calculating all base entities.
- Loading data files and consolidating data.
- Extracting data from one application and loading it into another Application.
- Reconsolidating all prior periods and scenarios.
- Regularly consolidating main points of view overnight during the close process.
- Oracle Internal & Oracle Academy

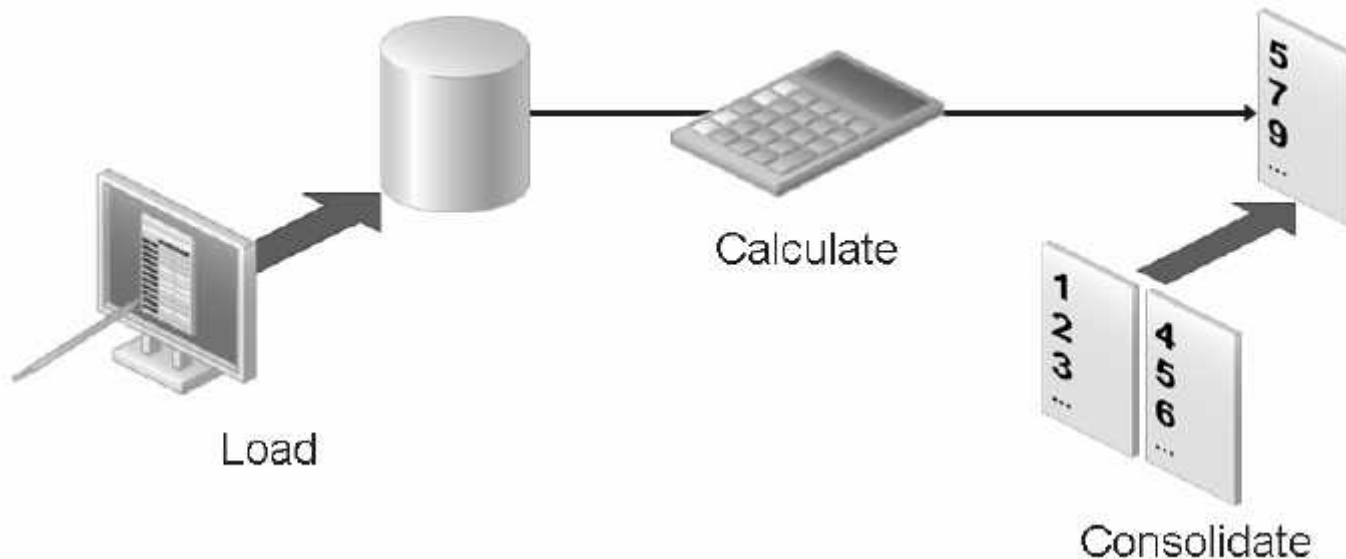
The ability to automate loading, calculating, translating, and consolidating tasks (including notifications) provides an opportunity to improve the efficiency of your monthly and quarterly closing and reporting business processes.



TASK AUTOMATION

Taskflow Overview

Any user who has the Task Automation role can access, create, and maintain taskflows that perform required Financial Management operations.

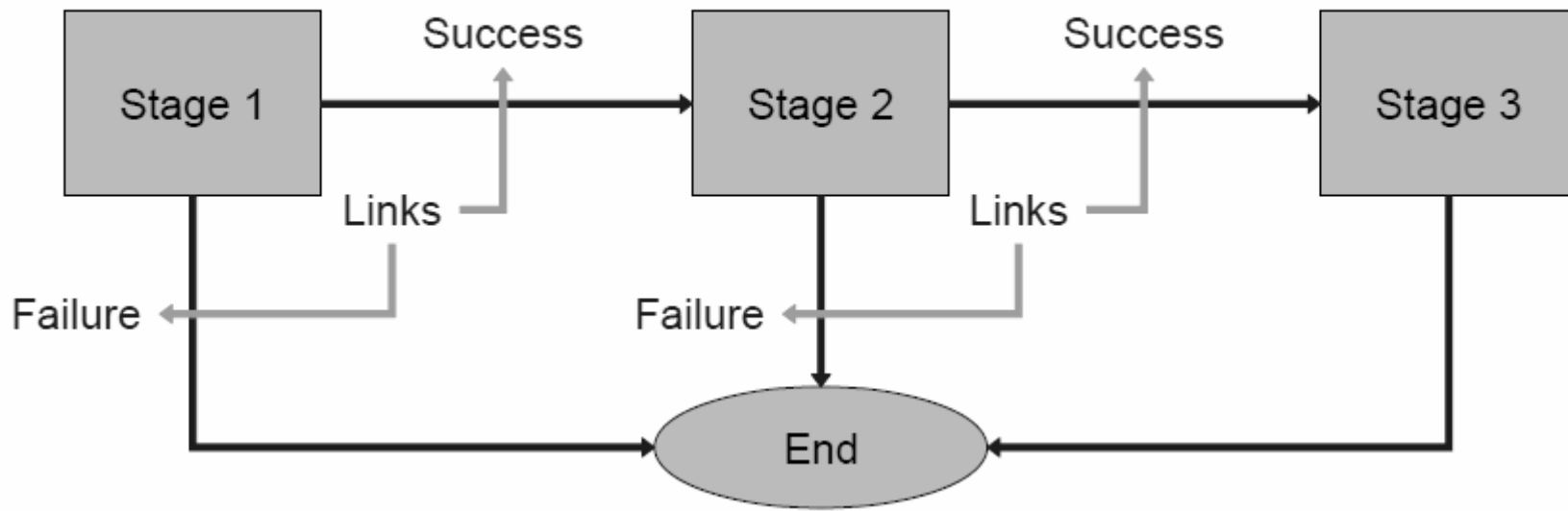




TASK AUTOMATION

Components of Taskflows

- Stages define specific tasks, such as calculations, consolidations, data loads, and so on.
- Links tell the system how to proceed after completion of the step.





TASK AUTOMATION

Components of Taskflows

A stage describes a step in a taskflow. Each stage has an action, such as load data, calculate data, and so on. These actions have parameters for which values are supplied at runtime.

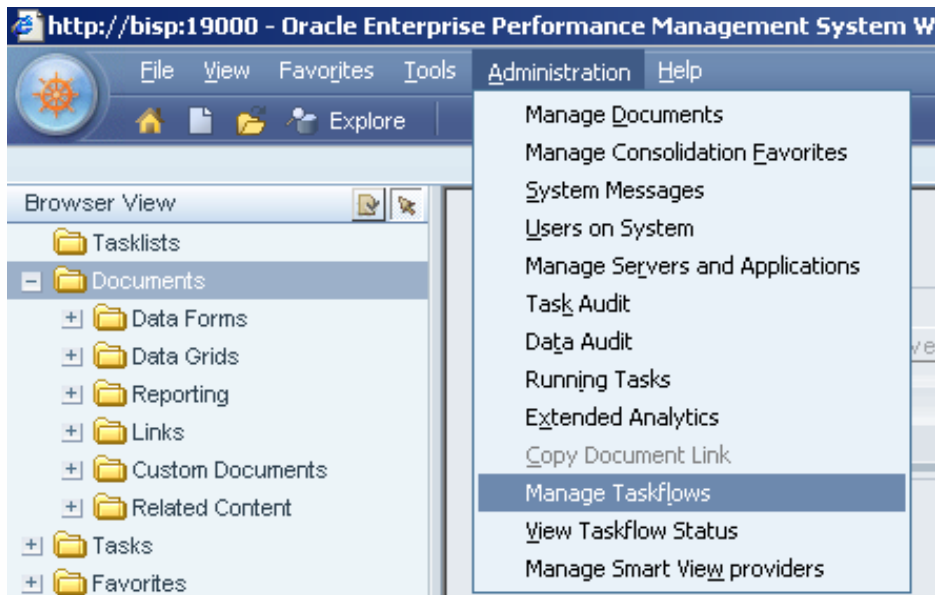
Each stage contains two tabs, except for the first stage, which has three tabs.

- General
- Processing
- Starting Event (first stage only)



TASK AUTOMATION

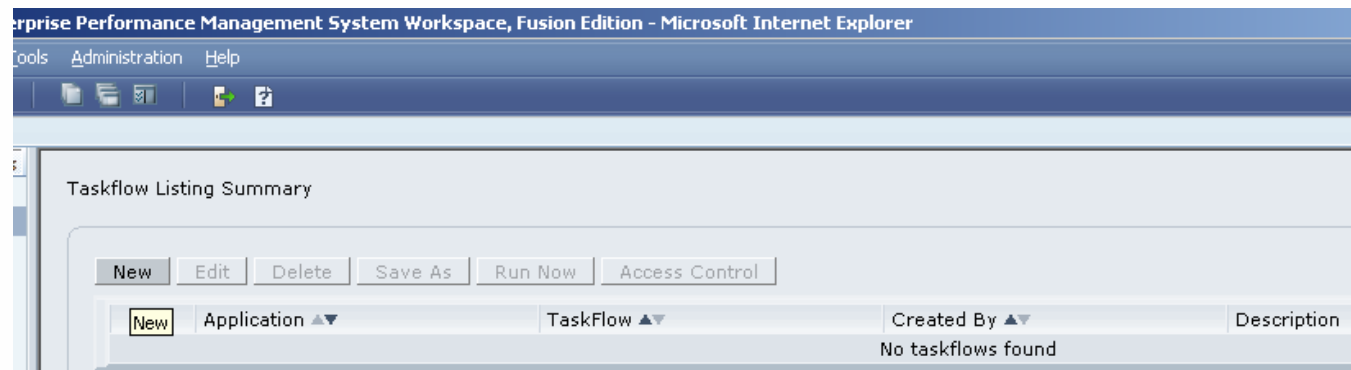
Creating Taskflows



1 Select

Administration > Manage Taskflows

2 Click New.





TASK AUTOMATION

Creating Taskflows

For Name, enter a taskflow name.

- The name can contain up to 40 characters.
- The Application text box displays the name of the current application.
- For Description, enter a taskflow description.
- Click **Submit**

The screenshot shows a web browser window with the address bar displaying "http://bisp:19000 - Oracle Enterprise Performance Management System Workspace, Fusion Edition". The browser's menu bar includes "File", "View", "Favorites", "Tools", "Administration", and "Help". The left sidebar shows a "Browser View" with a tree structure containing folders like "Tasklists", "Documents", "Data Forms", "Data Grids", "Reporting", "Links", "Custom Documents", "Related Content", "Tasks", and "Favorites". The main content area is titled "Define Taskflow" and contains three input fields: "Name:" with the value "TaskAutomationBISP", "Application:" with the value "BISPAPP1", and "Description:" with the value "A demo to show Task Automation". At the bottom right of the dialog are "Submit" and "Cancel" buttons.



TASK AUTOMATION

Stage Definition—General Tab

The General tab defines the stage name, description, and user ID of the user responsible for completing the stage. The user can be an initiator, that is, the owner of the first stage of the taskflow or another user for the other stages.

The screenshot shows a taskflow editor interface. At the top, there are buttons for 'Add Stage', 'Add Link', 'Delete', 'Save', 'Cancel', 'Properties', and 'Variables'. Below these, the 'TaskFlow: BISP' is displayed, and a 'Save TaskFlow' button is visible. The main area shows a taskflow diagram with a single stage labeled 'Stage1'. To the right of the diagram is a properties panel with three tabs: 'General', 'Processing', and 'Starting Event'. The 'General' tab is active, showing the following fields: 'Name: DATALOAD', 'Description: BISP MONTHLY DATA LOAD', and 'Run As: Initiator' (selected), 'UserName: admin', and 'Password: *****'.

General: Defines the stage name, description and user ID of the user responsible for running the stage. The user can be an initiator, which is the owner of the first stage in the taskflow, or another user for the other stages.

From the taskflow editor, click Add Stage.



TASK AUTOMATION

Stage Definition—Processing Tab

The Processing tab defines the actions to be performed when the stage is run and defines all required parameters.

TaskFlow: BISP Stage: DATALOAD

1 DATALOAD

General Processing Starting Event

Application: HFM - bisp - BISPAPP1

Action: Load Data

Parameter Name	Type	Value
Data File	TEXTBOX	\\Data\AllDataBISP.dat
Log File	TEXTBOX	jo\Data\AllDataBISP lo
Delimiter	TEXTBOX	;
Mode	PICKLIST	Select
Accumulate within File	PICKLIST	False
Contains Ownership Data	PICKLIST	True

Processing: Defines the action to be performed when the taskflow is run and any required parameters.



TASK AUTOMATION

Select Processing and enter this information:

- a. From **Application**, select an application from which to run the task.
- b. From **Action**, select an action to perform; for example, **LoadData**.
- c. From **Type for each parameter**, select **Picklist**, **Text Box**, or **URL** for the **Point of View**, depending on the action, and enter values for the parameter.
For example, for the **LoadData** action, the **Mode** option contains a picklist from which you can select **Merge**, **Accumulate**, or **Replace**.
For the data file and log file names and paths, you must manually enter the information in a text box. The taskflow is executed from the server, so you must make sure that the file names and paths are valid and can be accessed from the server running the task.



TASK AUTOMATION

Stage Definition—Starting Event

The Starting Event tab defines the event that initiates the taskflow and the scheduled times for the event to occur. The scheduled time is based on the time of the application server, not on the time of the local user's computer.

This functionality is schedule related. You can schedule the taskflow to run according to a schedule, such as weekly, monthly, at the first of the month, and so on.

Stage: DATALOAD

General Processing Starting Event

Starting Event: ScheduledEvent

Server Date: September 2, 2010 4:09:21 PM GMT+05:30

Start Date: 09/02/2010

Start Time: 12:00 PM

Recurrence Recurrence Pattern: Monthly

Day 1 of every 1 Month(s)

The First Sunday Of Every 1 Month(s)

No End Date

End After Occurrences

End Date

End Time 12:00 PM

Used to define the scheduled times for the event to occur



TASK AUTOMATION

Adding Links

A link is the point during the execution of the taskflow at which the activity in one stage completes and the taskflow ends or control passes to another stage. A link can be unconditional, where the completion of one stage always leads to the start of another, or conditional, where the sequence of operation depends on one or more link conditions. A link instructs the system about the action to take next. In general, most stages have two links, Success and Failure. You can specify that, if the first stage is successful, the system should proceed to the second stage (receiving stage). For example, if the first stage of LoadData is successful, the system should proceed to the receiving stage of consolidation. You can specify conditions for a link.

For example, you can add a condition for a consolidation task (stage), such as Consolidation Success == 'True'.

You must enter two equal signs (==) after the variable and place single quotation marks (') around the condition that you are evaluating. The value can be True or False.



TASK AUTOMATION

Adding Links

Buttons: Add Stage, Add Link, Delete, Save, Cancel, Properties, Variables

TaskFlow: abcd Link: Link1

1 DATALOAD

Link1

General Condition

Name: BISPLINK1

Description: BISP. LINK

Sending Stage: DATALOAD

Receiving Stage: End

- 1 Click Add Link.
- 2 Select General and for Name, enter a link name. The name can contain up to 30 characters.
- 3 For Description, enter a link description.
The Sending Stage is displayed for informational purposes.
- 4 From Receiving Stage select a stage.

5 Select Condition tab if applicable, and from Variable, select a variable, for example, LoadData_Result.

To delete a condition, click Delete.

6 From Value, select Success or Failure.

7 Click Add.

Buttons: Add Stage, Add Link, Delete, Save, Cancel, Properties, Variables

TaskFlow: abcd Link: BISPLINK1

1 DATALOAD

BISPLINK1

General Condition

Variable: DATALOAD_Result

Relational Operators: Equal to

Value: Success

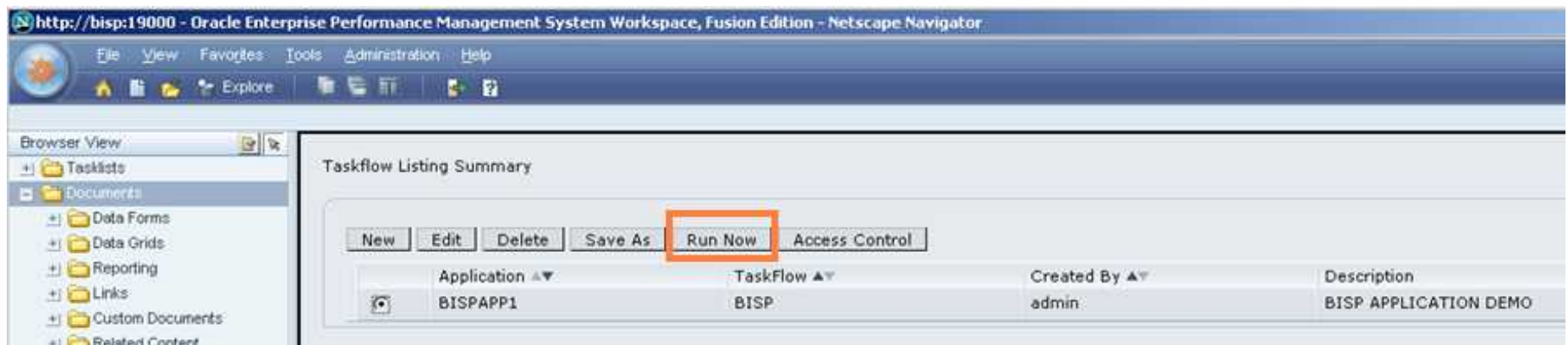
Buttons: Add, Delete



TASK AUTOMATION

Testing Taskflows

You can run a taskflow manually instead of waiting for it to start automatically. You may want to test a taskflow before the time that it is scheduled to run. Testing enables you to make adjustments to the taskflow before it actually runs



□ To run taskflows manually:

1 Select Administration > Manage Taskflows.

2 From the list of taskflows, select the taskflow to run and click Run Now.



TASK AUTOMATION

Editing Taskflows

After you create a taskflow, you can edit the taskflow description, and create, edit, or delete taskflow variables. You can also add or delete a stage or a link.

□ To edit taskflows:

- 1 Select Administration > Manage Taskflows.
- 2 Select the taskflow to edit and click Edit.





TASK AUTOMATION

Viewing Task Audit Detail

You can use Task Audit functionality in conjunction with task automation (especially for troubleshooting). Task auditing provides information on tasks that have been run.

The filters at the top of the Task Audit page can be used to select certain tasks.



Filter

Start Date	End Date	Server Selection	User Selection	Task Filter
9/2/2010	9/2/2010	All	All	All

[View](#) [Clear Log](#) [Export](#)

1 - 3 Per Page: 50

User	Activity	Time Started	Time Ended	Server	Description	Current Module
admin@Native Directory	Logon	9/2/2010 3:50:29 PM	9/2/2010 3:50:29 PM	BISP		Oracle Hyperion Financial Management, Fusion Edition
admin@Native Directory	Logoff	9/2/2010 3:50:06 PM	9/2/2010 3:50:06 PM	BISP		#@RID#@#74
admin@Native Directory	Logon	9/2/2010 3:35:49 PM	9/2/2010 3:35:49 PM	BISP		Oracle Hyperion Financial Management, Fusion Edition



TASK AUTOMATION

Viewing Data Audit Detail

The screenshot shows a web interface for viewing data audit details. It includes a 'Filter' section with the following fields:

- Start Date: 9/2/2010
- End Date: 10/2/2010
- Server Selection: BISP
- User Selection: admin@Native Directory

Below the filter section is a table with the following columns and values:

Scenario	Year	Period	Entity	Value	Account	ICP	Products	Customers	Custom3	Flow
Actual	2004	September	Stamford	USD Total	AdminExpen	[ICP None]	GolfBalls	Customer2	[None]	Increases

At the bottom of the interface are three buttons: View, Clear Log, and Export.

Use the Data Audit feature to view data changes performed by users. Use filters to view the data changes by date range, user, or dimension members. You must enable dimension members for data auditing by turning on the Enable Data Audit member attribute. The default is Off.



TASK AUTOMATION

Managing Access Permissions to Taskflows

You can assign permissions to individual users or to groups of users for individual taskflows. You must have Manage permission for a taskflow to assign permissions to it. Users inherit the permissions of the groups to which they belong. Permissions that you assign to an individual user, however, override any group permissions that the user inherits.

Assigning Write permission does not implicitly assign Read permission, and assigning Manage permission does not implicitly assign Read and Write permissions. Likewise, denying Read permission does not implicitly deny Write and Manage permissions, and denying Write permission does not implicitly deny Manage permission. You must explicitly assign all.



TASK AUTOMATION

Managing Access Permissions to Taskflows

- To assign permissions to taskflows:
 - 1 Select a taskflow and click Access Control.

Taskflow Listing Summary

New Edit Delete Save As Run Now **Access Control**

	Application ▲▼	TaskFlow ▲▼	Created By ▲▼	Description
	BISPAPP1	BISP	admin	BISP APPLICATION DEMO

You can view the permissions that are assigned to users and groups for the selected taskflow in the Access Listing window.

Access Listing for BISPAPP1_BISP_1

Add Edit Delete

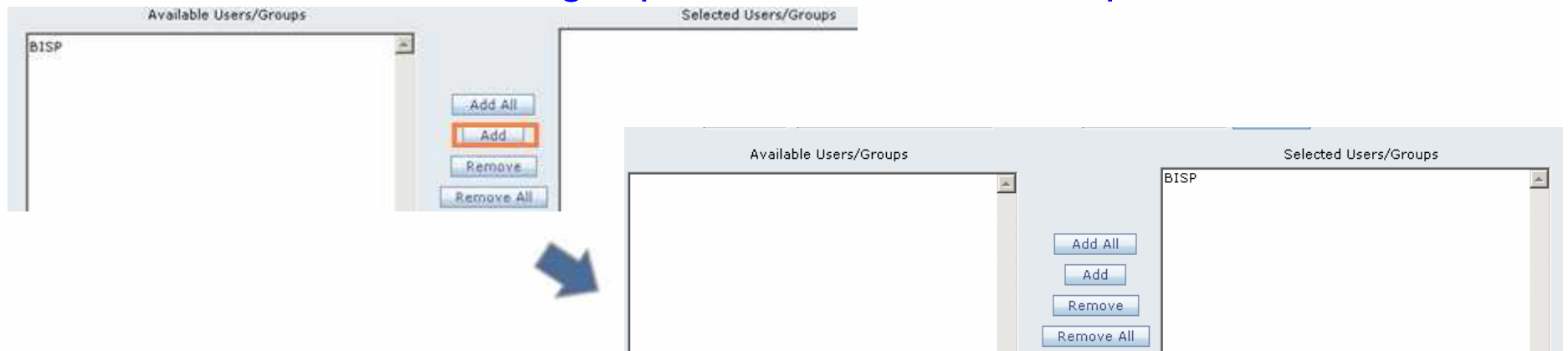


TASK AUTOMATION

To add users or groups, click Add.

The Add Principal window is displayed. Available Users/Groups lists users who are authenticated as Oracle's Hyperion® Shared Services users. If a user that you want is not on the list, contact the administrator to add authenticated users.

Click Add to move the selected users and groups to Selected Users/Groups or click Add All to move all users and groups to Selected Users/Groups.





TASK AUTOMATION

Managing Access Permissions to Taskflows

- For the Read, Write, and Manage permissions, select an access type: **Grant**, **Deny**, or **None**.
- Click Add to assign the permissions.

* represents Groups

Type of Access

Read: Grant Deny None

Write: Grant Deny None

Manage: Grant Deny None

Add Cancel

- **Grant:** Explicitly grant the permission to the user or group.
- **Deny:** Explicitly deny the permission to the user or group.
- **None:** Do not apply the permission to the user or group.



TASK AUTOMATION

Managing Access Permissions to Taskflows

* represents Groups

Type of Access

Read: Grant Deny None

Write: Grant Deny None

Manage: Grant Deny None

Add Cancel

Read : View a taskflow.

Write : Edit a taskflow.

Write permission does not automatically include Read permission. You must assign Read permission explicitly, in addition to Write permission, if you want a user to have both.

Manage : Create new users and change permissions for users.

Manage permission does not automatically include Read and Write permissions. You must assign Read and Write permissions explicitly, in addition to Manage permission, if you want a user to have all these permissions.



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